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INSTITUTE OF GEOGRAPHY AND SPATIAL ORGANIZATION

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EASTERN DIMENSION OF EUROPEAN UNION



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INTRODUCTION

Meetings of scientists held in May in the Podkarpacki region of south-eastern Poland have already entered permanently into the diary of international scientific conferences devoted to comprehensively conceived socio-economic problems of Central and Eastern Europe. The first one of such conferences, organised by the Faculty of Economics of the Rzeszów Branch of the Maria Curie-Skłodowska University, was held on 28th and 29th May 1992 in Rzeszów and it may be treated as an enterprise initiating a cycle of yearly international discussion meetings whose subject-matter has always referred to the most up-to-date processes and phenomena occurring in the socio-economic space of Central and Eastern Europe, and the related problems of Podkarpacie.

The conference this year, held at Arłamów from 25th to 29th May, was already the 12th meeting and its underlying goal was assessment of the pre-accession preparation level in the countries that are to join the European Union on 1st May 2004, and acquaintance with mechanisms occurring in the whole region of Central and Eastern Europe under the influence of changing social, cultural and economic conditions. Such changes are visible in all fields of social life and economic performance. Hence they include the natural and cultural environment of man, communication, economy, spatial organisation, etc. Changes also affect mechanisms of international co-operation, and a different meaning is gained by inter-state borders that in many cases will become borders between the European Union and the countries outside the Union. This will bear new challenges for transborder co-operation between the countries, hitherto operating in a specific geopolitical system, and for ordinary interhuman co-operation. The region where the conference of this year was held, i.e. Podkarpacie, belongs to such regions.

The subject of this year's conference "Eastern Dimension of European Union" was a kind of the scientific last will of Professor Marcin Rościszewski who passed away so prematurely. The late Professor was for many years the Deputy Head and Chairman of the Scientific Council of the Institute of Geography and Spatial Organisation at the Polish Academy of Sciences, the creator of the publishing series of Geopolitical Studies, for whom geopolitical problems lay very near His heart and who for many years was closely engaged in co-organisation of the May Scientific Conferences. He always showed assistance to the main organiser, from the very beginning, of the May Scientific Conferences, Professor Jerzy Kitowski from the Faculty of Economics at the University of Rzeszów. It is thanks to His organisational efforts the invitation to the Conference has been accepted so far by many outstanding guests from foreign and domestic scientific centres. This year over 70 participants from nine European

countries took part in the scientific meeting at Arłamów. During the conference, 56 papers were presented.

Some of those papers have become the bases for scientific works written by their authors to be included in this volume. Due to the extensive range of problems referring to the main subject of the conference, and to variety of research directions whose results are presented by the authors in their papers, the works have been divided into five topic groups, including the following:

1. European Integration Processes – 6 papers;
2. Eastern Border of European Union – 5 papers;
3. Central and Eastern Europe in the Face of European Integration Processes – 18 papers;
4. Transborder Co-operation – 6 papers;
5. Directions of Socio-Economic Transformation in New Geopolitical Conditions – 10 papers.

The problems discussed in the issue No. 11 of Geopolitical Studies, which is being handed over to our Readers, are very important from the viewpoint of the transformations occurring in the local, regional and supraregional systems of Central and Eastern Europe under influence of extension processes in the European Union. The next conference, planned for 2004, will continue discussion of problems connected with the eastern dimension of the European Union and will concern assessment of the natural environment and the socio-economic space at the moment of accession by Central and East European countries to the European Union, i.e. the so-called „opening balance-sheet”.

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PART I

EUROPEAN INTEGRATION PROCESSES

SPATIAL DIMENSION OF EUROPEAN INTEGRATION PROCESSES

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The intensifying process of civilisational development is very strictly connected with progress in technology and organisation. It is manifested in integration of the world socio-economic and cultural space. It is expressed by a fast-advancing globalisation process (Howells, Wood 1991, Kukliński 1994, Wierzbicki 1995). Within this process the basic role is played by processes of capital concentration, manifested in shaping of increasingly large and competitive industrial, financial, commercial and organisational corporations. Such companies, of supranational functions, are shaped in such places of the world space that provide the most favourable conditions for location of management seats, as well as location and development of production and service units, and in other words are marked by the highest spatial competitiveness.

In the light of the former tendencies to the socio-economic growth of spatial systems it should be assumed that also in the future the globalisation process (manifested, e.g., by organisational and decision-taking, as well as spatial concentration of capital) will spread and it will gradually cover newer and newer countries. That is, for example, indicated by the spatial concentration of managements of the world leading supranational corporations (Zioło 2001). While analysing the 500 largest world companies, it turns out that on the territory of the USA there are 187 managements of such corporations, and jointly with Canada - 202 managements of companies, while on the territory of Japan there are 102 managements of companies of this type (Table 1). Jointly, in the area of the two countries there are as many as 304 managements of the 500 largest world companies. Whereas on the territories of the leading European countries there are from 34 to 37 of them. The managements of the largest companies (from the first fifty) are seated only in the areas of 9 countries, including 17 on the territory of the USA, and 15 in Japan, i.e. jointly 32 managements, and the remaining 12 companies have their seats on the territories of 6 European countries: France, Great Britain, Germany, The Netherlands, Italy, Switzerland, and Venezuela.

Table 1. Management seats of the world leading companies in 2000.

Countries	Total	Ranks of companies in the ranking									
		1-50	51-100	100-150	150-200	200-250	251-300	301-350	351-400	401-450	451-500
USA	187	17	21	25	20	22	17	13	20	13	19
Japan	102	15	6	2	10	9	11	11	8	13	17
France	37	4	3	5	2	6	3	3	4	2	5
Britain	36	2	3	3	6	2	5	6	2	5	2
Germany	34	6	4	7	2	2	3	2	6	1	1
Canada	15			1				7	1	2	4
Switzerland	13	1	3	1	1	1	2	2	1	1	
China	11		3			2	2	1		3	
South Korea	11		1	4	1	2	1		1	1	
Netherlands	10	2	2	1	1	1	1			2	
Italy	8	2	1		2	1		1	1		
Australia	6							3	1	2	
Spain	6		1	1	1	1			1		1
Belgium	4		1				2	1			
Brazil	3				1				1	1	
Finland	2				1					1	
Hong Kong	2				1						1
Malaysia	2						1		1		
Mexico	2		1						1		
Norway	2				1		1				
Russia	2						1		1		
India	1					1					
Venezuela	1	1									
Luxembourg	1									1	
Singapore	1									1	
Sweden	1									1	
Total	500	50	50	50	50	50	50	50	50	50	50

Source: Global

A substantial concentration of economic potential of those companies results in the fact that the United States and Japan play functions of the leading

poles of the socio-economic growth in the world space. A weaker position in this respect is held by the European countries: Germany, France and Great Britain, on whose territories there are from 5 to 10 managements of such companies.¹

In such a situation European countries have had two ways of development, either to develop individually as peripheral economic systems of the two leading poles of growth, or to combine their economic potential and to create purposefully a third European pole of the economic growth. As the result of choosing the latter way, there appeared on the territory of Europe an idea of a gradual economic integration whose result are currently shaping economic, social and political structures of the European Union (Gabbe, Malchus 1995, Kukliński 1995, 1997, Moys 1995, Oziewicz 1995, Wallance 1990). In the new situation the management seats of 139 supranational companies located on the territories of the European Union countries provide an economic base for creation of the third world pole of the economic growth.

This means that processes of the European integration are stimulated on the one hand by globalisation processes, and on the other hand they result from the relations of the spatial competitiveness of the world poles of the socio-economic growth that are being shaped.

Thus, in the contemporary times three world poles of the economic growth are being developed in the world economic space: the United States with Canada, Japan and the countries of the European Union. The three poles are playing a dominant role in the world economy and they are concentrating jointly 443 managements, out of the 500 largest world companies. The remaining countries are playing a much smaller role in this respect. On the territories of the 11 remaining countries there are only 57 management seats of this type corporations, including 3 in Brazil, 6 in Australia, and in China and South Korea – 11 in each. This underlines a high differentiation of the world space concerning the degree of its competitiveness for the process of organizational and decision-taking concentration of capital and it indicates a meaningful world distance between civilisations concerning regional systems in this respect.

The presented considerations indicate that the European Union is being shaped in the conditions of the intensifying economic competition from the

¹ If we consider 100 largest world supranational corporations, it turns out that 38 of them have their seats on the territory of the United States and they include 40.2% of all incomes, 49.9% of profits and concentrate 39.6% of the working. The next rank is held by Japan, on whose territory there are 21 companies of this type and 22.8% of incomes, 16.5% of the property, and 11.9% of the working. Jointly on the territories of the two countries there are 59 managements of the dominating companies that include 63.0% of incomes, 63.5% of the property, 58.0% of profits and 51.5% of the working.

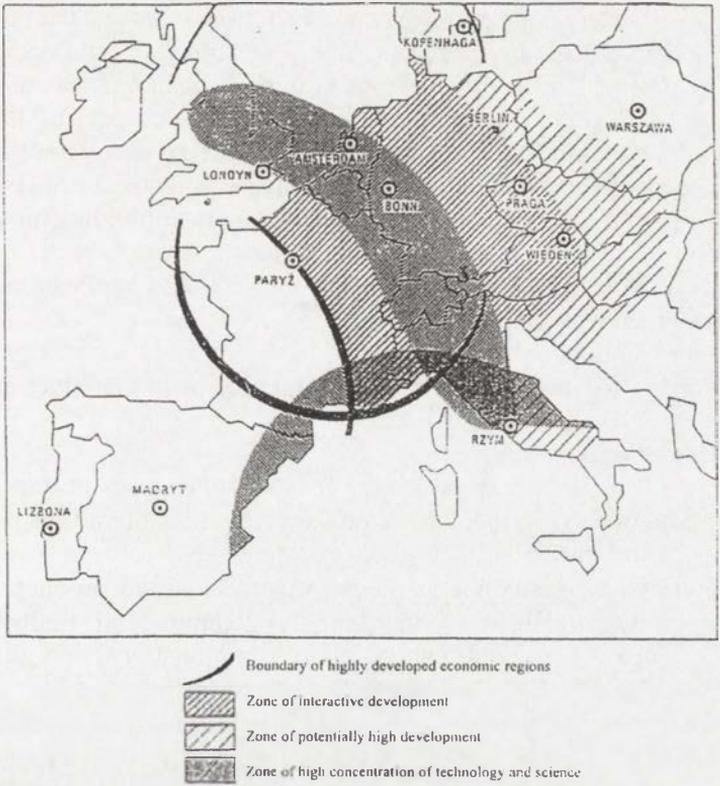
American and Japanese poles of the growth, not only concerning the offered products but also concerning extension of their influence in the space of the world market.

The contemporary socio-economic space of the European Union is also featured by a substantial differentiation in the development level. Out of the 100 largest world companies, jointly 31 managements have their seats on the territory of the European Union. The basic meaning have here companies whose 10 managements are located on the territory of Germany. They include 32.7% of all incomes of the European Union countries, 32.9% of profits and 43.2% of the working. The next ranks in this respect are held by France (7 managements), Great Britain (5) and The Netherlands (5). The area of the four countries jointly accumulates 88.1% of incomes of the largest European companies, 89.4% of profits, 88.5% of the property, and 90.9% of the working. This means that on the competitive world market the economies of those countries play the most important role and they must always take care of maintaining their most favourable position. A minor share in this respect is held by Italy, Belgium, Spain, whereas there are no managements of this type companies in the following countries: Austria, Denmark, Finland, Greece, Ireland, Luxembourg, Portugal and Sweden. Here, it is worth quoting an opinion by A. Kukliński (1995, p. 40), who says "naïve opinions, presented on the basis of an analysis, limited by subjects, of DG XVI materials, forget that in the last instance the activity of the Union is specified by interests of strong core partners, and not of weak peripheral partners".

Such processes also influence the remaining European countries, especially those that are already candidates for the European Union, but also on the East European countries that will become candidates for the Union in the coming future. Therefore, in order to build proper strategies for development of those countries it is important to get to know precisely the spatial mechanisms of the European integration. It must be underlined that the European Union makes a new quality of the European space (Kukliński 1995). In this new situation, with improper operation of the existing regional or national structures, new mechanisms appearing on the territory of Europe may lead to polarisation of conditions and level of the economic, social and cultural life, and to activation of their adverse results. As the result of the operation of polarisation processes, differentiation of the world space ensues, and consequently, in some areas a more intense civilisational development and a progressing concentration of capital may be observed, whereas in some others we can see a marked economic degradation and a deepening retardation of the civilisational development. That is why any actions in favour of levelling disproportions concerning civilisational development of the world space, as well as of regional systems, are especially important (Pietrzyk 2000).

Generally, it must be assumed that the Union's activity on the one hand polarizes, and on the other hand makes the European space more uniform. That is why we assume a thesis that reconstruction or creation of a new Polish economic and social space, as well as of the space of regional systems of individual countries cannot be made without knowledge of that complex world and European process.

Fig. 1. A new economic map of Europe



Source: Datar Reclus, after Kołodziejcki J., Parteka T. – *Polski Region Bałtycki w europejskiej strategii ekorozwoju*. Vol. 1. Uwarunkowania. Instytut Problemów Eurorozwoju, Fundacji “EUROBALTIC”, Gdańsk 1993.

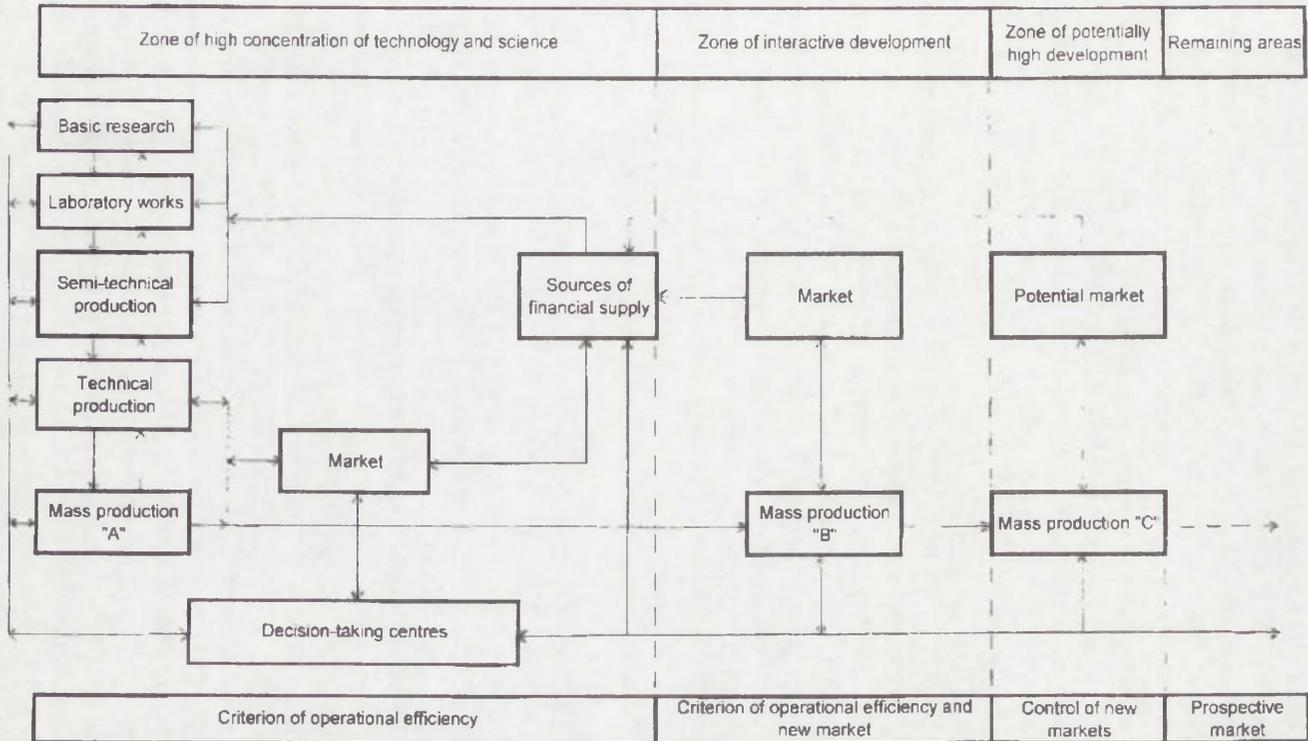
An important premise for transformations of the regional systems in Poland and also in countries of Central and Eastern Europe should be a precise analysis of the contemporary economic map of Europe, considering consequences of its transformations in relation to the regions that interest us (Fig. 1). From the viewpoint of the presently shaping functional and spatial relations, zones of different level of the socio-economic development and different func-

tions may be differentiated in the structure of the European space. They are made up by: a zone of high concentration of technology and science, a zone of interactive development, a zone of potentially high development and peripheral areas (Ziolo 1999).

The zone of high concentration of technology and science covers the area extending from central England across Belgium, The Netherlands, the western part of Germany, the eastern part of France, Switzerland and northern Italy until Rome. The zone concentrates modern industry, locates seats of managements (of decision-taking and financial institutions) that are the basic motor factor for socio-economic development. The zone stimulates and decides about directions and intensification of development in the remaining areas of the European continent, relevantly to implementation of strategic goals of the leading companies, which mainly concern shaping of raw material and market areas. The zone is featured by high abilities to generate innovations by means of (Fig. 2):

- a) undertaking on its area of new works on new productions concerning:
 - development of science concerning basic (theoretical) research,
 - implementation of basic research results into practical applications,
 - research and development activities,
 - research in laboratories,
 - undertaking of semi-technical production (experimental production),
 - launching of technical production,
 - mastering of mass production,
- b) mastering and implementation of new forms of management and organisation of production to enhance operational effectiveness of various production structures by means of:
 - elaboration of new systems concerning organisation and production, indispensable for management of increasingly complex and multifunctional manufacturing and service structures, often of supranational and global character,
 - studies on control of markets concerning new location of production and service activity, financial and capital activity, consulting activity, and others,
 - development of research and marketing activity to extend spatially and to enhance absorption of the existing markets and to search for new ones,
- c) operational improvement of financial institutions, indispensable for development of economic activity and intensification of links between businesses and institutions,
- d) location of decision-taking centres (managements of companies) or their divisions, but also location of various type plants and institutions (of production, services, finances and others) of international meaning,
- e) development of various type institutions of business environment and network infrastructure, as well as of social infrastructure for an efficient operation of the above listed segments of the zone

Fig. 2. Operation of "NEW EUROPE" zones.



Source: Own work.

The zone is featured by substantial intellectual resources of the population and concentrates the best-qualified scientific and managerial personnel who are distinguished by relative wealth and growing needs concerning conditions of life, work and rest. That is why, because of use of good conditions of the natural environment, we observe creation of a second zone of high concentration of technology and science extending along the coast of the Mediterranean Sea from western Spain across southern France to Rome.

Zones of interactive development are located in the direct neighbourhood of the zone of high concentration of technology and science on its eastern and western sides. The zone from the east covers a wide belt, extending in an arch south from the Northern Sea, until Berlin, including the Czech Republic and Austria. The zone, together with the zone of high concentration of technology and science, is featured by strong functional links concerning: the flow of new technologies, organisation of production, the flow of capital and decision-taking, connected with management of various type activities of companies and institutions. Complementary relations of the both zones (i.e. the zone of high concentration of technology and science and the zone of interactive development) provide more favourable conditions for the mutual economic growth. Intensification of links between the zones requires improvement of transport infrastructure and communication, and development of indispensable institutions of "business environment" in their areas (especially those enabling fast flows of capital and finances, and information, as well as of raw materials, semi-products and finished products). Continuous appearance of new innovation solutions in the zone of high concentration of technology and science affects transferring of mass production to factories (organisationally and financially linked with decision-taking centres of the zone) located on the territory of the zone of interactive development. At the same time profits flowing from the production and sales of mass production products are again one of the basic factors of financial supply of the decision-taking centres, including the sphere of scientific research and development, located in the area of the zone of high concentration of technology and science.

In the contemporary economic system of Europe, in the zone of interactive development was the area of the Czech Republic, whereas the area of Slovakia was located in the zone of potentially high development. It was the basic factor for the peaceful division of Czechoslovakia into two independent states (the Czech Republic and the Slovak Republic). The Czech Republic is in the zone of interactive development and is strongly linked to the European economy of the zone of high concentration of technology and science, whereas Slovakia has become independent. Thus the division gave initially the Czech Republic much greater opportunities for individual accession to the economic structures of the European Union, than jointly with Slovakia. Similarly, much better economically developed northern regions of Italy (located already in the

zone of high concentration of technology and science) have shown quite recently some tendencies to separation from less developed southern regions. At present, in order to level to some extent the existing disproportion in development, substantial part of means obtained in the northern regions is transferred in various forms to the southern regions that are retarded economically, socially and culturally.

The zone of potentially high development is an area that is becoming an object of strategic interests by the decision-taking centres located in the zone of high concentration of technology and science. The zone is located east of the zone of interactive development and it covers: the north-eastern part of Germany, the western part of Poland from Szczecin, across Poznań, Upper Silesia, until Cracow, Slovakia, western and central Hungary, and Slovenia and part of the Italian territory, south of Rome.

Along with development of intellectual and capital resources, a gradual extension of the zone of high concentration of technology and science will take place onto the territory of the present zone of interactive development. On the other hand, the present area of the zone of interactive development will cover the territories of the zone of potential development.

A manifestation of thus appearing spatial process has been the transfer of Germany's capital from Bonn, located in the zone of high concentration of technology and science, to Berlin, located on the boundary between the zone of interactive development and the zone of potentially high development. That decision enhanced to a large extent the competitive position of the city and it would accelerate the shaping process of a new capital agglomeration of European functions, based on rules for development in the zone of high concentration of technology and science. It would attract to its territory managements of leading world companies that would wish to operate in the close proximity of the centre of political administrative power of the leading state in the European Union.

Each municipal agglomeration develops in connection with its base of supplies (the zone of influence), consisting of the surrounding areas. For the proper shaping of the agglomeration of Berlin (at the assumed number of inhabitants of ca. 5 million people), the zone of influence should cover from 120 km to 150 km. Shaping of Berlin's zone of influence from the west will affect extension of the zone of high concentration of technology and science eastwards to the areas of the present zone of interactive development. Different conditions of shaping of the supply base for the Berlin agglomeration are from the eastern side. The present state border between Poland and Germany is ca. 80 km from Berlin and it constitutes a barrier for shaping of the supply base for the agglomeration. That is why in order to shape in a rational way the new spatial system, i.e. the agglomeration of Berlin and its base of supplies, it is useful to abolish the existing barrier constituted by the present state border between

Poland and Germany. The situation will be solved by Poland's accession to the European Union, hence Germany is the greatest supporter of Poland's membership in the Union. Liquidation of the political border will activate former economic links of Berlin with Szczecin, and Wrocław, and economic links with Poznań will also be intensified. This will result from spatial communication relations. At present an express train goes 3 hours and 8 minutes from Poznań to Berlin and from Poznań to Warsaw only one minute longer. The offer of Berlin, however, will undoubtedly be more attractive for economic links and inhabitants of Poznań, than the offer of Warsaw, e.g. the more competitive airport in Berlin will give them, for example, a better offer of international connections than the airport in Warsaw.

Beside the distinguished zones there are European peripheral areas that in the future will be gradually absorbed by the extending zone of potentially high development, and then by the zone of interactive development.

The distinguished European zones have been shaped as a result of operation of various factors, featured by different processes of economic growth and they are at different stages of socio-economic and cultural development. This means that uncritical transfer of patterns for economic development, e.g. from the zone of high concentration of technology and science to the zone of potential development, or peripheral areas, may likely not give positive results concerning economic growth. While building strategies for shaping regional structures, patterns for development taken from one zone must be earlier adapted to different conditions occurring in the area of another zone.

In this situation there is a question what place in the global process of transformations and the related process of the European integration Polish regions and countries of Eastern and Central Europe have at present, and what place they should have in the future.

Generally, three variants of transformations are possible:

- maintaining of the present development process and the related tendencies of transformations, which will lead to further extension of the civilisational distance in regions less developed in relation to regions of countries economically developed, because they will develop faster and faster,
- undertaking of actions aimed at multiplication of those development paths that were followed by presently developed West European regions, and as a consequence the existing civilisation distance will be maintained,
- undertaking of actions aiming at making economic development more dynamic, so that the existing civilisational distance between Polish and East European regions and economically developed European regions could be shortened.

It should be stressed that the most proper variant to be followed is the third variant whose implementation requires (Klasik 2002, Kołodziejcki 1997, Mikołajewicz 2000, Ziło 2003):

- thorough acquaintance with development paths of economically developed regions, paying special attention on the one hand to factors stimulating economic growth that occur in the process, and on the other hand to hampering barriers,
- identifying the present development paths of peripheral areas against the general process of growth in order to establish precisely factors and barriers hampering socio-economic development,
- identifying present and future strong and weak sides of individual regional structures that may or will affect their further development,
- taking rational directions of socio-economic transformations, resulting from strategic goals and internal conditions of a given regional system and its environment,
- identifying contemporary trends of transformations and their evaluation from the viewpoint of the assumed goals and possibilities of changing conditions of their implementation,
- taking proper controlling instruments,
- observation of the on-going transformation process and implementation of required corrections of the controlling instruments, aiming at acceleration of implementation of the assumed goals.

Among goals of regional policy it seems especially important to create on the territory of regions of Central and Eastern Europe:

- European centres of growth that will be shaped based on development rules of the zone of high concentration of technology and science, so that in specific fields partner's relations could be maintained with respective centres in western regions; again, those centres will stimulate transformation processes of their bases of supplies and the remaining areas of the regional structure through their systems of socio-economic links,
- reconstruction of agriculture by means of initiatives originating from the concerned farmers and leading to concentration of production (a good example may be taken here from the reconstruction ways of agriculture in Champagne that almost 70 years ago had a similar structure as the present agriculture in south-eastern Poland (Debelle, Fircowicz, Maj, Richard, Woźniak, Ziolo 1996),
- development of regional growth centres (which will aim at gradual absorption of substantial surpluses of labour resources from agriculture) and reconstruction of agriculture (towards improvement of efficiency and competitiveness of production). Such action should be undertaken simultaneously, based on comprehensive strategic concepts, e.g. based on patterns of growth poles (Ziolo 1980, 2001a).

It is possible to implement the goals exclusively at systematic elevation of the educational level, an increase in intellectual resources of the population

and co-operation in this respect of local and regional governments with scientific centres. Implementation of the goals must lead to establishment of a regional structure that will be of partner's (complementary) character, and competitive to some extent, in relation to neighbouring regions and regions in economically developed countries.

The present experiences show that many regional programmes do not go beyond the project phase, despite respective expenditures. This mainly results from a lack of extensive knowledge about transformation process of regional structures and a lack of proper diagnostic expertises, explaining previous tendencies to changes that may be used for creation of rational reconstruction directions for the existing regional structures. A very frequent misunderstanding is application of western patterns that have given good results, but in different conditions occurring in areas of various stages of socio-economic and cultural development. In works devoted to development goals for a given area it should be assumed that individual regions have specific conditions and different problems to solve. For rational restructuring of individual regions it is necessary to work out specific methods, adapted to the existing conditions and rationally established goals. In such works results of basic research, results of applied research and experiences from business practice must find their complementary places.

Non-fulfilment of the ideas will lead to intensification of marginalisation process of regional structures in Central and Eastern Europe in relation to economically developed regions in the zone of high concentration of technology and science. In the light of contemporary processes leading to economic polarisation, both in the scale of Europe and domestic scales, it is already possible to forecast that a lack of actions aiming at implementation of modern rules of socio-economic development of individual regions will lead to extension of their civilisational distance not only in relation to West European regions, but also the development level of domestic regions will be increasingly differentiated.

In creation of new behaviour for regional structures it seems very important to undertake an attempt to analyse totally (holistically) various type of conditions that in a specified degree may favour possibilities to stimulate economic development towards construction of a modern regional system or they may create certain barriers in this respect. Failure to consider totally transformation processes, also including phenomena that are socially unfavourable, may lead to substantial hampering of the on-going transformations that faced with irresponsible politicians may even result in dangerous confrontations².

² Rapacki R. (1994, p. 2) makes a hypothesis, "that in most cases personal features and mental dispositions of new authorities, which were useful in the times of fight against the totalitarian system, similarly as experiences and operational habits acquired then, under the conditions of construction of a new democratic deal are a burden rather than a factor facilitating the transformation".

It should be initially assumed that the process of socio-economic transformation and political regional systems are affected by various categories of conditions, among which we may conventionally distinguish (Zioło 2002):

- conditions resulting from global processes occurring worldwide or on individual continents,
- conditions resulting from the European situation,
- conditions common for all countries of Central and Eastern Europe,
- internal conditions in individual states, previously connected with the system of central control,
- internal regional conditions.

The distinguished categories of conditions undergo a continuous process of transformations and make up a hierarchical structure, going from the world system, through the European system to the regional system. Between the distinguished types of conditions there are specific functional links in the shape of chain and feedback connections. Depending on the scale of their intensification, they may create factors stimulating specific tendencies to transformations to be implemented by appearance of new elements, as well as by growth, stagnation, regress of the existing elements or disappearance of elements that have lost their economic base and the related functions.

In the light of contemporary tendencies to global development, transformations of regional structures should aim at gradual reduction of the civilisational distance in relation to regions of developed countries.

The basic condition for implementation of modern ideas of shaping regional systems is acquisition by the governing elites of new habits of thinking and behaviour, as well as acceptance of the thesis that without deeper knowledge of processes of global and European development, and internal conditions, it is very difficult to shape effective and competitive regional structures.

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Streszczenie

PRZESTRZENNY WYMIAR PROCESÓW INTEGRACJI EUROPEJSKIEJ

Wstępnie przyjęto założenie, że procesy rozwoju cywilizacyjnego, nawiązujące do postępu techniczno-organizacyjnego prowadzą do integracji światowej przestrzeni społeczno-gospodarczej i kulturowej. Przejawiają się one w nasilających się procesach globalizacji, które zmierzają do koncentracji kapitału w coraz większych korporacjach przemysłowych, kapitałowych, handlowych i in.. Do tych reguł nawiązuje proces integracji europejskiej, który prowadzi do wykształcenia się trzeciego światowego biegunu wzrostu społeczno-gospodarczego obok biegunu wzrostu Stanów Zjednoczonych i Japonii.

W wyniku określenia zróżnicowanej konkurencyjności poszczególnych obszarów przestrzeni europejskiej (w świetle lokalizacji siedzib zarządów wiodących firm

światowych), omówiono strefy o różnym poziomie rozwoju społeczno-gospodarczego oraz spełnianych funkcjach, a to: strefę silnej koncentracji technologii i nauki, strefę interaktywnego rozwoju, strefę silnego potencjalnego rozwoju oraz obszary peryferyjne.

Na tym tle w celu zintensyfikowania rozwoju regionów Europy Środkowej i Wschodniej, przedstawiono kierunki działań dla polityki gospodarczej i przestrzennej zmierzające do stopniowego skracania dystansu cywilizacyjnego europejskich obszarów peryferyjnych w stosunku do rozwiniętych regionów Unii Europejskiej.

SOCIO-ECONOMIC DIFFERENCES IN INTEGRATING EUROPE

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The eastern dimension of European Union – as I suppose – is the most presently appearing in its enlarging by 10 accessive countries. it means that the size of the Union will be enlarged by 738.5 thous. of sq. km and by 75 mln. of population. In historical and geographical sense it reaches far to the East. Cyprus for the present times was Orient for an European, as perripheral areas of the continent were treated the eastern coasts of the Baltic Sea. The other aspect of the eastern dimension of the Union may be presented by its opening for wide co operation with the East European countries being outside the Union. Development of partnership contacts between the UE and those which are outside the UE countries has got and will have great importance for the whole continent and its role in the world in the times of globalization in the both attitudes the eastern dimension, Poland plays an important role as the biggest of the accessive countries and the most important among the Eastern European countries with positive geopolitic position.

The aim of the paper is to draw attention to some socio-economic differences and similarities in European countries and taking place changes mainly in accordance to their importance for integration processes. I took into account 31 countries presented in the tables. For making the analysis easier the countries have been grouppped into 3 groups: 1. - EU countries (15 countries), 2. - countries which signed accessive treaty in Athens in June (10 countries), 3. - some other countries.

It should be stated that comparison of demographic potential of EU countries and the accessive ones does not point out for possibility of more important conflicts in the future. All European countries will face similar problems:(ageing of societies, increasing number of population in post productive age, immigration pressure and others). Estimations for 2015 point out that number of population in 3 groups of countries will be decreasing in EU countries – in the result of inflow from outside – the decrease will be 2.4 mln in comparison to 2000, in the accessive countries about 3 mln, in the third group about 20

mln. So population inflow may be intensified from other regions of the world what may make the ethnic structure of Europe more complicated and may cause new common problems.

Table 1. Population and employment structure

Groups of countries	Population in thous.		Employment structure in %					
	2000r.	2015r.	1995r.			2000r.		
			agriculture	industry	services	agriculture	industry	services
The EU countries:								
Austria	8 100	8000	7,0	28,0	65,0	6,5	28,0	65,5
Belgium	10 300	10 300	2,5	28,5	69,0	2,5	24,0	73,5
Denmark	5 300	5 400	3,5	25,5	71,0	3,5	26,0	70,5
Finland	5 200	5 300	7,0	26,5	66,5	6,0	27,0	67,0
France	58 900	61 600	5,0	26,0	69,0	1,5	24,0	74,5
Greece	10 600	10 300	20,5	20,5	59,0	18,0	21,5	60,5
Spain	39 500	38 800	8,0	26,5	65,5	7,0	27,0	66,0
Netherlands	15 900	16 900	3,5	21,0	75,5	3,0	20,0	77,0
Ireland	3 800	4 300	10,0	25,5	64,5	7,0	26,5	66,5
Luxembourg	442							
Germany	82 200	80 000	3,0	32,0	65,0	2,5	32,5	65,0
Portugal	10 000	9 900	15,0	30,5	56,5	12,5	34,0	53,5
Sweden	8 900	8 800	2,5	25,5	72,0	2,5	22,5	75,0
Great Britain	59 700	59 700	2,0	25,5	72,5	1,5	24,5	74,0
Italy	57 700	54 800	7,0	30,0	63,0	5,5	24,0	70,5
Total or average	376 542	374 100	6,8	26,5	66,7	4,5	25,8	69,3
The accessive countries:								
Cyprus	783							
Czech Republic	10 300	9 900	6,5	38,5	55,0	5,0	35,5	59,5
Estonia	1 400	1 300	12,0	33,0	55,0	9,0	31,5	59,5
Lithuania	3 700	3 600	20,5	28,0	51,5	17,5	28,0	54,5
Latvia	2 400	2 100	20,5	26,5	53,0	15,5	25,5	59,0
Malte	392							
Poland	38 700	38 800	20,5	31,0	48,5	19,5	31,0	49,5
Slovak Republic	5 400	5 400	8,0	38,0	54,0	7,5	37,0	55,5
Slovenia	2 000	1 900	12,5	40,0	47,5	11,0	37,0	52,0
Hungary	10 000	9 400	8,0	32,5	60,5	6,5	31,0	62,5
Total or average	75 075	72 400	12,1	29,7	47,2	10,2	28,1	50,2
Other countries:								
Belarus	10 000	9 300						
Bulgaria	8 200	7 400						
Croatia	4 400	4 200						
Russia	145 600	134 500				11,5	29,5	59,0
Romania	22 400	21 400				41,0	27,5	31,0
Ukraine	49 500	44 900	13,6	33,4	53,1	10,1	32,6	56,8

Own work: World Development Indicators 2000, The World Bank, Washington 2000; World Development Indicators 2002, The World Bank, Washington 2002, s. 18-20, 56-58.

Differences in employment structures will be of great importance in longer time perspective. Employment ratios in % in 3 branches of economy for the accessive and EU countries are different (Tab. 1). For instance for agriculture the average value for EU countries was 4.5% in 2000, for the accessive countries 10.2%, for Poland 19.5% and it was the highest in that group of countries. It should be noticed that there are great differences as to employment in agriculture among the EU countries e.g. Greece (18%), or Portugal (12.5%) In the third group the problem can be most drastically noticed in Romania where 41% of all employed in national economy work in agriculture.

Generally in Europe a progress can be observed as between 1995 and 2000 the value of the analysed ratio decreased the least in Poland by 1 point. Employment in industry in EU and the accessive countries decreased slightly by 1 point but there were different tendencies. In 2000 employment in that sector in the Union was ca. 26% of professionally active, in the accessive countries 28% It should be pointed out that decrease of employment in industry in the accessive countries was common, but that process was not so common in the EU countries. Its share in creating new work places higher than of the services – was in Portugal, Spain, Greece and Ireland. There may be a question asked if Poland and Lithuania would not follow this tendency? Though there are great delays in services development.

To know better the level of the studied countries there were collected and studied data on urbanisation level, consumption of electric energy and widespreading of some of electric technical equipment and gross domestic product (Tab.2).

As a measure of civilised development and development of individual informatics the number of telephones, including the mobile ones and pc can be taken into account The differences in telecommunication are decreasing between the EU and the accessive countries (accordingly 1200 sets per 1000 inhabitants and nearly 700 In some examples the differences are great In Sweden there are more than 500 pc per 1000 inhabitants whereas 70 pc per 1000 inhabitants are in Poland and Lithuania.

Even greater differences can be noticed while comparing gross domestic product the differences are dramatic. From one side there are Luxemburg, Denmark and Sweden in which GDP in 2000 was 42,32 and 27 thous. US \$ per person and Ukraina with 700\$.

There are also great differences within the distinguished groups. Coefficient characterizing GDP was counted for particular countries according to the average for all UE countries the coefficient for Luxemburg is 174%, for 7 countries it exceeds 100%. Particularly low it was for Greece (49%) and Spain, Portugal and Italy. Among the accessive countries only the inhabitant in Cyprus is in better condition than the inhabitant of Greece. The other countries of the

second group are in much worse situation. In Czech GDP is 22% of the mean for EU, in Poland 17%.

Table 2. Some factors concerning socio-economic level

Groups of countries	GDP in US \$ per person		GDP to the Union average	Energy consumption in Kwh per person	Urban population in %	% of unemployed in 1998-2000	Telephones (mobile ones incl.) per 1000 persons	Persaonal computers per 1000 persons
	1990	2000	2000	2000	2000		2000	2000
The EU countries:								
Austria	20 509	25 220	104,5	6 176	65,0	4,7	1 228	276,5
Belgium	19 249	24 540	101,6	7 286	97,0	7,0	1 023	344,5
Denmark	25 242	32 280	133,7	6 030	85,0	5,4	1 351	431,5
Finland	22 608	25 130	104,1	14 366	67,0	9,8	1 271	396,1
France	21 020	24 090	99,8	6 392	76,0	10,0	1 073	304,3
Greece	6 587	11 960	49,5	3 854	60,0	10,8	1 089	70,5
Spain	12 623	15 080	62,5	4 947	78,0	14,1	1 033	142,9
Netherlands	18 974	24 970	103,4	5 993	89,0	3,6	1 288	394,1
Ireland	12 775	22 960	95,1	5 011	59,0	4,7	1 077	359,1
Luxembourg	24 100	42 060	174,2	12 755			1 611	453,2
Germany	22 243	25 120	104,1	5 690	87,0	8,1	1 196	336,0
Portugal	6 048	16 990	70,4	3 616	64,0	3,8	1 095	299,3
Sweden	26 605	27 140	112,4	14 138	83,0	5,1	1 399	506,7
Great Britain	17 078	24 430	101,2	5 384	89,0	5,3	1 316	337,8
Italy	18 986	20 160	83,5	4 535	67,0	10,7	1 211	179,8
Average	18 313	24 142	100,0	7 078	76,0	7,4	1 217	322,0
The accesive countries:								
Cyprus	7 850	12 370	51,2	3 671			968	220,6
Czech Republic	3 050	5 250	21,7	4 682	75,0	8,8	802	122,0
Estonia	7 566	3 580	14,8	3 438		14,8	750	152,9
Lithuania	6 172	2 930	12,1	1 769	68,0	11,4	463	64,9
Latvia	6 978	2 920	12,1	1 851	69,0	8,4	469	140,3
Malte	6 544	9 120	37,8	3 763			814	204,4
Poland	1 631	4 190	17,4	2 388	66,0	16,7	456	68,9
Slovak Republic	2 561	3 700	15,3	4 216	57,0	18,9	519	136,9
Slovenia	8 860	10 050	41,6	5 218	50,0	7,5	998	275,9
Hungary	3 132	4 710	19,5	2 874	64,0	6,5	674	85,3
Average	5 434	5 882	24,4	3 387	56,0	12,0	691	147,2
Other countries:								
Belarus		2 870	11,9	2 704	70,0	2,0	274	
Bulgaria	6 162	1 520	6,3	2 899	70,0	16,2	440	43,9
Croatia	5 358	4 620	19,1	2 674	58,0	16,1	431	80,7
Russia	6 521	1 660	6,9	4 050	73,0	11,4	240	42,9
Romania	1 648	1 670	6,9	1 511	56,0	10,8	287	31,9
Ukraine	4 769	700	2,9	2 306	68,0	11,9	203	17,6

Own work: Statistical Yearbook 1993, United Nations, New York 1995, s. 153-168, s. 593-599; Demographic Yearbook, UN, New York 1997, s. 169-173; World Development Indicators 2002, The World Bank, Washington, s. 134.

In the group of other countries e.g. in Bulgaria it is only 6% of that for EU inhabitant and for Ukrainian inhabitant even less than 3%.

It is worth watching how the value of GDP was changing between 1995 and 2000. It was increasing in all EU countries, the quickest in Portugal and Greece. Dynamics of GDP in weaker economically EU countries is for us an optimistic signal.

Another feature distinguishing Middle and Eastern European countries from Western ones is small share of export in making national income. Nearly all countries not belonging to EU present negative balance of external trade (Tab 3). Russia is particularly distinguished with not only positive balance of external trade but also the results have been improved lately what is closely connected with great export of mineral resources, energetic mainly.

Interesting conclusions concerning European economies can be drawn from foreign trade observations. The more detailed analysis of trade connections points for the accessive countries particularly important was exchange with highly developed countries, especially with Germany and Italy. Similarly the exchange of the EU countries was taking place in the developed countries. As to Russia export to high developed countries and others was rather balanced, import from developed countries prevailed what points out that the contact with developed economy is very important for Russia. Both export and import between Russia and Belarus increased whereas with Ukraina decreased.

The size of trade exchange and cooperation among Poland and Russia, Ukraine or Belarus is not good for economic objects so there is required long term vision conditions with the eastern neighbours. New problem may appear together with demanding visas for entering Poland since July 2003 for East Europeans. This will have a negative influence on transborder trade.

Sometimes the Polish side was involved with not bad results into close to border areas and developing wider cooperation while making euroregions (M.Kozanecka 1999). It seems that at present new ideas from Union were more expected.

There are problems of development disproportions inside particular countries. Bringing into life some western examples we should mention specific situation in the south of Italy economic backwardness of Sardinia and Corsica, some regions on Pyrenee Peninsula or in the Northern Ireland in comparison to the level of economy (Weidenefeld W., W. Wessels 2002). In that part of Europe negative social results can be limited thanks to active regional policy of particular countries and EU.

In middle Europe in the times of system transformation such problems have been sharpened the closest example can be economic and social situation in Polish north-western voivodeships or in so called the eastern wall in comparison to the situation in Warsaw or in mazowieckie or wielkopolskie voivodeships. Realised in the latest years investments especially foreign, deepen those

disproportions as they are located mainly in big agglomerations and better managed regions. The situation is similar in Hungary, Russia and other countries.

Table 3. External trade in 1995 and 2001

Groups of countries	Export in mld \$		Import in mld \$		Balance in mld \$		Export in US \$ per person
	1995	2001	1995	2001	1995	2001	2001
The EU countries:							
Austria	57,6	66,7	66,4	70,4	-8,8	-3,7	7 950
Belgium		189,3		178,5		10,8	18 250
Denmark	49,8	50,5	45,0	43,7	4,8	6,8	9 528
Finland	39,6	42,8	28,1	32,1	11,5	10,7	8 230
France	284,9	294,6	281,4	292,5	3,5	2,1	5 002
Greece	11,0	9,5	26,8	29,9	-15,8	-20,4	1 009
Spain	91,0	115,2	113,3	153,6	-22,3	-38,4	2 916
Netherlands	196,3	216,1	176,9	194,9	19,4	21,2	13 132
Ireland	44,3	82,9	32,6	51,3	11,7	31,6	21 816
Luxembourg		7,9		10,7		-2,8	18 371
Germany	523,8	570,4	464,3	486,4	59,5	84,0	6 939
Portugal	23,2	23,9	33,3	37,9	-10,1	-14,0	2 300
Sweden	79,8	75,1	64,7	62,6	15,1	12,5	8 438
Great Britain	242,0	267,4	265,3	320,9	-23,3	-67,0	4 480
Italy	234,0	241,7	206,0	232,9	28,0	8,8	4 189
The accessive countries:							
Cyprus	1,2	1,0	3,7	3,9	-2,5	-2,9	1 250
Czech Republic	21,7	33,4	25,3	33,2	-3,6	0,2	2 806
Estonia	1,8	3,3	2,5	4,3	-0,7	-1,0	2 214
Lithuania	2,7	4,6	3,6	6,4	1,0	1,4	1 027
Latvia	1,3	2,0	1,7	3,2	-0,4	-1,2	791
Malte	1,9	1,9	2,9	2,6	-1,0	-0,7	4 750
Poland	22,9	36,1	29,1	50,3	-6,2	-14,2	819
Slovak Republic	8,6	12,6	8,8	14,7	-0,2	-2,1	2 222
Slovenia	8,3	9,3	9,5	10,1	-1,2	-0,8	4 350
Hungary	12,8	30,5	15,4	33,7	-2,6	-3,2	2 800
Other countries:							
Belarus	4,8	7,5	5,6	8,1	-0,8	-0,7	730
Bulgaria	5,4	5,1	5,7	7,2	-0,3	-2,1	585
Croatia	4,6	4,7	7,5	8,0	-2,9	-3,3	1 001
Russia	82,9	103,2	68,9	58,9	14,0	44,3	725
Romania	7,9	11,4	9,5	14,4	-1,6	-3,0	464
Ukraine	13,3	14,7	16,0	15,7	-2,7	-1,0	290

Own work: Direction of Trade Statistics Yearbook 2002, International Monetary Fund.

The problem of eastern orientation of EU must resemble us the situation in the eastern voivodeships and their role in the future. The problems of that close to border part of land was many times the subject of analysis during international conferences in Polańczyk and Arłamów and they were presented in post-conference publications There is a small chance for breaking the stagnant situation of close to border lands while changing them into huge economic and

political commonwealth interested in wide cooperation with the East. It should result in increased goods and passenger transportation new aims in border services, new investments in infrastructure, education in preparing new employees and others. It can also be a chance for small and middle firms interested in production and different type of services. To achieve the aim activation of Polish regional policy is required. EU experiments should be used as well as their regional policy which is characterised by elasticity and reality. Regional development stimulation in EU promotion of productive investments is particularly important as well as making infrastructure for enterprise support and that the Union cannot see the possibilities for decreasing disproportions inter regional with the help of market factors only (L. Ciamaga et al, 1999).

Concluding, it can be stated that the analysis presented that:

1. there is a great differentiation of European countries but there are also close partial directions of changes and similar problems in their socio-economic structure (loss of population, unemployment internal disproportions).
2. links of the Eastern Europe with the west European economy are relatively strong ,so the enlarging EU seems very natural. The speed of making the disproportions less will depend on the speed of economic growth and on activity of particular countries and local societies in carrying out regional policy.

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Streszczenie

RÓŻNICE SPOŁECZNO-GOSPODARCZE W INTEGRUJĄCEJ SIĘ EUROPIE

Przedmiotem analizy są wybrane elementy gospodarcze i społeczne krajów europejskich na przełomie XX i XXI wieku. W opracowaniach tabelarycznych uwzględniono 31 państw i uporządkowano je w trzy grupy: 1. kraje należące do Unii, 2. kraje które podpisały w kwietniu w Atenach dokument akcesyjny, 3. niektóre inne państwa. Celem artykułu jest zwrócenie uwagi na różnice jakie występują w krajach Europy i zachodzące w tym zakresie zmiany, głównie pod kątem ich znaczenia dla procesów integracyjnych. Zwrócono uwagę na zbyt nadal duże zatrudnienie w rolnictwie w niektórych państwach – mimo ogólnego zmniejszenia się wartości tego wskaźnika w latach 1995-2000 oraz słabszy stopień zaawansowania w krajach akcesyjnych rozwoju usług. Odnotowano również znaczny dystans cywilizacyjny pomiędzy krajami unijnymi a pozostałymi w zakresie rozpowszechniania komputerów osobistych. Jeszcze większe różnice ujawniają się przy porównaniach PKB. Odnotowane rozpiętości mają dramatyczną wymowę. Ostrość dysproporcji w tym zakresie pokazuje obliczony wskaźnik charakteryzujący wielkość poszczególnych krajów do średniej wielkości PKB dla wszystkich krajów UE. Również niekorzystnie przedstawia się bilans handlu zagranicznego w państwach akcesyjnych – większość z nich ma ujemny bilans.

Należy podkreślić, że mimo znaczących różnic pomiędzy wyróżnionymi grupami krajów zauważalny jest powolny proces wskazujący na przybliżanie się krajów akcesyjnych do unijnych. Na pewno będzie to proces długi, przyspieszenie wyrównywania różnic nastąpić może w krajach akcesyjnych po ich włączeniu do Unii Europejskiej.

THE SOCIAL CAPITAL AS THE BASIS FOR SOCIAL AND ECONOMIC DEVELOPMENT IN UNIFYING EUROPE¹

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Knowledge is the basic factor in postmodernist economical development. Modern economy is often considered in terms of “knowledge-driven economy”, or “knowledge-based economy”. The human capital is, therefore, the intellectual resource of the country, region and business (*Gorzela G., 2003*).

The investment in knowledge and education

The investment in knowledge is the basis of long-term economic development in Europe. Currently, many countries with lower-than-average investment in durable capital, belong to the group of the biggest technological investors.

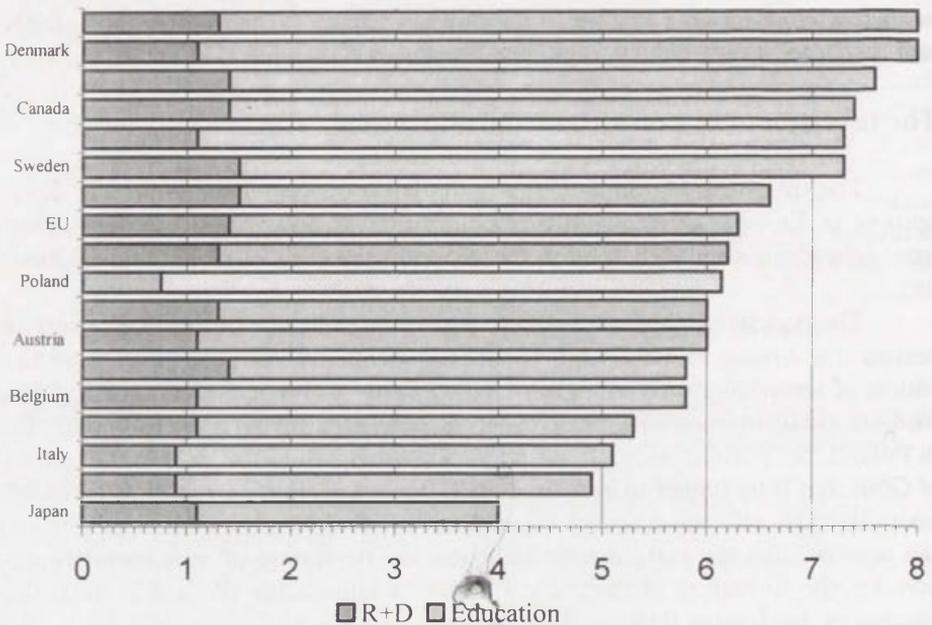
The typical example is Sweden, where the indicator of durable capital investment is lowest in the Union, but it is associated with the very high participation of knowledge investment in GNP. Similarly, France, Denmark and Finland are small investors in material actives, but they invest a lot in knowledge. In Poland, the participation in so called “knowledge investment”, in the context of GNP, is a little higher than overall OECD average, but, currently, it is in 90% assimilated by education sector. Regardless of low positive GNP/1 citizen, we can assume, that the participation indicates the beginning of new social formation, i.e. the formation of the society based on knowledge (Poland is at the beginning of professional preparation phase).

The activities which are connected with knowledge-societies concentrate in big cities. They form a network which connects economies of Central and Northern Europe. Spatial map of Europe can be described in the terms of the research and development investment participation in GNP. The concentration

¹ - Up-dated version of the article published in: Edit. K. Frysztacki, K. Heffner, 2003, In Response to Social Phenomena and Challenges, Silesian Institute in Opole, p. 60-69.

of research and development funds is spatially correlated with the concentration of best-qualified professionals. In order to avoid further growth of disproportion between the peripheral and central regions, the European Union plans investing in knowledge which will contribute to forming connections between peripheral regions with main European networks. The plan includes “new peripheries” which are forming in the process of East-and-Southward expansion. People who live in those “new peripheral zones” will be able to participate in special, enriched educational programs (Second Progress Report... 2003).

Fig. 1. The participation of “knowledge-investment” in GNP in selected OECD countries in % (Source: *Raport o stanie nauki i techniki w Polsce 1999, 2000*).



The transition to knowledge-economy and knowledge-society depends on general approach towards different dimensions of knowledge, including the availability of education.

In thirty years, the availability of education in the Union countries significantly grew, in particular, in the least developed regions. There are, however, significant differences between educational levels in member countries. Also, there are educational differences between candidate and member countries.

Table 1. The structure of population according to education, age 25 to 59, in the European Union member countries, and in candidate countries, in % (2002).

No	Countries	Low	Medium	High
	EUR (27 countries)	31	48	20
	UE in general (15 countries)	35	43	22
	Candidate countries (10 countries)	20	66	14
1	<i>Lithuania</i>	11	45	44
2	Finland,	24	42	34
3	Sweden	21	49	31
4	Belgium	39	32	29
5	England	19	53	29
6	<i>Estonia</i>	13	58	29
7	Denmark	19	55	27
8	<i>Cyprus</i>	34	39	26
9	Holand	33	42	23
10	Germany	17	58	25
11	Spain	60	17	23
12	France	36	42	23
13	Ireland	49	28	23
14	Luxembourg	37	44	19
15	<i>Latvia</i>	14	68	19
16	Greece	45	37	18
17	<i>Slovenia</i>	23	61	16
18	Austria	22	63	15
19	<i>Hungaryy</i>	27	59	14
20	<i>the Czech Republik</i>	13	75	12
21	<i>Poland</i>	18	71	12
22	<i>Słowakia</i>	14	75	11
23	Italy	52	38	10
24	Portugal	78	12	10
25	<i>Malta</i>	.	.	.

Source: *Second Progress Report...*, 2003, s. A30-A38

In several member countries, people from 25 to 59 years of age have low-level education. In 2000, 78% of the population in Portugal, 60% in Spain, and about 50% in Italy, Greece and Ireland wasn't well-educated. In North European countries, Belgium, and the Great Britain, 25% of people, age 25 to 59, have post-secondary school diplomas (university level or its equivalent).

In Central Europe, the majority of the population has only secondary education. In the Czech Republic, Slovakia and Poland, the indicator is above 70%. Based on research, we can assume, that high participation of people with secondary education contributes to the availability of higher education. It is a solid basis for increased participation of people with higher education (Ciok,

Jakubowicz, 2000). We should remember, though, that many people with secondary education graduated from secondary vocational schools, which offered basic vocational training. In fact, those schools were the extensions of primary schools, and their graduates shouldn't be really considered, and, after Poland's joining the Union, won't be considered, as high schools graduates. Vocational training doesn't comply with the Union standards, and current vocational education on high and higher levels won't be considered as complying with the Union standards. It is necessary, than, to establish appropriate strategies for the human development in those countries, in order to eliminate low qualification, which contributes to slowing down economic and social development. Candidate countries have big educational needs, bigger, than indicated.

In 30 years, the number of qualified young professionals grew in the European Union. The participation of people with university diplomas, age 25 to 34, is 7% higher than in the group of older people.

Table 2. Educational level of people in production age.

Educational level	The participation of people according to age, in %	
	age 25 – 34	age 50 – 59 lat
Low	27	48
Medium	49	35
High	24	17

Source: *Barnier M., 2001.*

The number of better educated young people significantly grows in all union countries. In particular, the growth is significant in the countries who recently joined the Union, and in Italy. In the group of people age 25 to 34, the ratio of people with secondary education, in 1999, was two times higher than in the group of people, age 50 to 59. The difference is similar in regards with the post-graduate group. Women are better motivated to obtain good education, and younger women in almost all Union countries have better education than their male partners.

In candidate countries, the number of better educated people is also growing. The ratio of young people with higher education is significantly higher than in the group of people, age 50 to 59. In Poland, gross education indicator grew three times in nominal age group from 19 to 24.

Table 3. Current education availability indicator at universities and colleges in Poland

Description	1990	1995	1997	1998	1999	2000	2001
Education indicator:							
Gross	13	22	29	33	37	41	44
Net	10	17	22	25	28	31	33

Source: *Szkoły wyższe i ich finanse w 2001 r., 2002, s. XIX.*

In Poland, each third young person now studies at the college level, and at the beginning of the 1990's, only each tenth person studied at that level. The significant growth of the number of students is connected with the fact that they are non-resident students in both state run and privately owned colleges. The participation of people with post-graduate diplomas is relatively low. The number of graduate students is significantly lower in Poland than in the European Union countries.

Social stratification in educated society is based on the division between those who have skills and qualifications, and those without any skills and qualifications. Therefore, the result of quitting a school is more significant now, than it was in the past. When a student stops studying, he/she limits his/her professional perspectives. Schools are the hearts of learning societies. Permanent education starts at the primary school level.

Unsuccessful learning is a problem in all social classes, however, the extent of failure isn't equally divided. Different studies reveal the fact that student who leave the system mostly come from low-income families, whose members had problems in the past. Many students quitting the system come from problem-families, immigrant and refugee families who failed to integrate with the society. Therefore, school quitting is connected with many factors, such as social, medical, family and financial problems. The phenomenon is only one of many cumulative elements of social degradation process. It is, however, critically important a factor. It deprives young people of qualifications and skills which they need to become successful members of the society. Solving the problem is the core goal of debates on educational system reform. It is very important a factor which contributes to economic development based on knowledge. It contributes to the maintaining stable society and stable democracy, which every one can join.

Effective educational and training systems are very important factors which influence productivity and economic development. Also, they influence the development of computer technologies. Insufficient education would negatively influence all candidate countries where vocational education doesn't comply with the needs of new economic sectors. In next ten years, the number of people with higher education should double, and that is a special challenge

for educational systems in all European countries (specialists predict the overload of all systems).

Permanent education and employment

Better employment perspectives are based on better education. That is the obvious truth everywhere in the world. In almost all European Union countries, education determines the possibility of employment. Unemployment is always lower among people with college diplomas than in the groups of people with fewer skills and lower qualifications (except in Greece and, to lesser extent, in Portugal).

Table 4. Average unemployment rate in the European Union and in Poland, according to education in % (2000).

Educational level	EU	Poland
Low	5	4
Medium	8	25
High	12	36

Source: *First Progress Report...*, 2002, www.stat.gov.pl

In some member countries, the unemployment rate among people with poor education was three to four times higher than among people with higher education. In Poland, the rate was ten times higher. Similar pattern applies to other candidate countries. The difference between unemployment rates between the groups with different education is most significant on the Czech Republic, Hungary, and Slovakia, where the possibility of losing a job by a person with poor education is seven times higher than among people with higher education. In Greece, Spain, Italy, and in several candidate countries, significant number of college graduates, age 24 to 34, has problems finding jobs, and that is in contrast with the situation of older people with similar qualifications.

The correlation between the quality of education and employment of women is even higher. Many women who don't have good education, and many men, aren't at all considered as potential employees. Therefore, the lack of education not only contributes to unemployment, but, also, it contributes to overall economic activity.

Personal income is correlated with the quality of education: the better education, the better salary. In all member countries the income grows proportionally to the level of education, and university graduates have similar income (considering cost of living) in all union countries (*M. Barnier, 2001*). We may assume, then, that there is a common graduate job market, and the mobility of college graduates grows, although, there are yet many obstacles, such as non-transferability of qualifications, and language problems. It is possible, that there

will be a tendency towards the equalisation of salaries for college graduates, and that the salaries of people with less education will remain different.

In all member countries, full-time employees with post-graduate diplomas, earn much more money than college graduates. The difference is 50% in Germany, France and Austria, and 100% in Portugal. The difference between the groups of college and high school graduates in the majority of member countries is significantly smaller (10 to 20%).

Continuous education and training influence both employment and economic competitiveness. Based on statistics, we find that the participation in professional training grows in Europe, but, we realise, too, that there are yet big differences between member countries. In 1999, only a little over 10% of employees in the European Union included in the Labour Force Survey (LFS) participated in any kind of training in recent four weeks. In 50% of member countries, participation indicator is at 5%, and in Holland, Denmark, Finland and Sweden, it is at 20%. The numbers aren't very dependable, but they suggest, anyway, that training isn't satisfactory in the countries which recently joined the Union, and in candidate countries. The demand for training differs, depending on age: they train more young than senior employees.

There is a correlation between education and training availability. In all member countries, people with better education receive more training than poorly educated employees. It is necessary, therefore, to reverse the tendency, and train more people who aren't well educated.

Almost all countries in Europe must do a lot in order to improve information-and-communication technology (ICT). Students need information-and-communication technology in order to be able to meet job market requirements. In the European Union, education system becomes more and more integrated with the ICT requirements. The problems of integration was discussed by the European Council during their meeting in Lisbon. The Council issued a report entitled "eLearning" which described the need to strengthen integration efforts. Information technology is a part of educational programs in primary and secondary schools in many union countries. It isn't easy, though, to estimate integration progress, because the data from union countries aren't balanced, and only the data from individual countries are available.

Pilot analysis by OECD indicates different ICT availability in different member countries (availability is measured according to the number of students using one computer). One computer is used by

- in primary schools, in Finland, Sweden, Denmark, from 11 to 14; in Italy, Portugal, from 50 to 150; in Poland, over 100;
- in secondary schools, in Sweden, Finland, Ireland, 7; in Portugal, 65; in Poland, 75.

In Poland, low level of computer availability in primary schools is connected with significant disproportion between city and rural schools (there are

fewer computers in rural areas). Computer availability in primary and secondary schools is lower in almost all member countries than in the United States of America. There are more computers, however, in European households than in America. In the U.S. A., there are computers in 36% of households, in Denmark 44%, in Holland 42%. In 1999, only 10% of Polish households had computers (based on the Report on Science and Education in Poland in 1999, 2000). Poland is considered as even more backward in relationship with the availability of information-and-communication technology than in the relationship with its education system.

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The resemblance between branch economic structure in developed countries and regions is growing. In all developed countries, they stress the importance of service sector, and production sectors loose their branches, which, until recently, had been considered as the source of economic power, scientific and technical development. Not only declining and traditional industries, but, also, machine and utility-oriented electronic industry are being moved to the countries and regions where labours is less expensive, and ecological standards are lower. As the result of that process, there are the following tendencies:

- job market in developed countries needs highly qualified employees;
- job market in less-developed countries, where production concentrates in low-paid, laborious sectors, needs low-qualified workers.

Globally, a country is more competitive when it is better prepared to introduce innovative ideas to its industry. In many countries, the tendency isn't strong. The countries, which easily absorb innovative technologies developed in other regions, belong to a different category. In Central Europe, highly innovative economies are associated with negative effects, such as brain drain from peripheral areas. As the result of that tendency, those areas loose their basic ability to develop. If the trend stabilises, there is a danger of even further deterioration of the area. The problem exists in many countries, including the countries which are considered as "merging markets".

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Streszczenie

KAPITAŁ LUDZKI, PODSTAWĄ ROZWOJU SPOŁECZNO – GOSPODARCZEGO JEDNOCZĄCEJ SIĘ EUROPY

Najważniejszym czynnikiem rozwoju postmodernistycznej gospodarki jest wiedza. Stąd często mówi się o współczesnej gospodarce napędzanej wiedzą (*knowledge-driven economy*) czy też opartej na wiedzy (*knowledge-based economy*). Kapitał ludzki staje się zasobem intelektualnym kraju, regionu, a także przedsiębiorstwa (Gorzelał G., 2003), a wysoki udział "inwestycji w wiedzę" w PKB staje się podstawą długookresowego rozwoju gospodarczego danego kraju. Działania związane ze społeczeństwem opartym na wiedzy koncentrują się w określonych ośrodkach wielkomiejskich dających początek gęstej sieci, która łączy gospodarki centralnej części Europy oraz krajów nordyckich (ryc.1). Wyrazem tego jest obraz przestrzenny Europy opisany udziałem nakładów na badania i rozwój w PKB. Koncentracja nakładów na badania i rozwój jest przestrzennie skorelowana z koncentracją najlepiej przygotowanych kadr. (*First Progress Report ... 2002*). W 2000 roku: 78% w Portugalii, około 60% w Hiszpanii oraz około połowa ludności Włoch, Grecji i Irlandii. Z kolei w krajach nordyckich, w Belgii oraz Wielkiej Brytanii ponad jedna czwarta osób w wieku od 25 do 59 roku życia posiada wykształcenie wyższe lub studia podyplomowe (stopień uniwersytecki lub równoważny), w krajach Europy Środkowej przeważa znacznie ludność z wykształceniem średnim. Jednak jako nie przystające do standardów europejskich i w wielu wypadkach nieaktualne ocenia się obecne kierunki kształcenia zawodowego, na szczeblu średnim i wyższym. Na tym tle uważa się, że kraje kandydackie mają większe potrzeby edukacyjne, aniżeli wynika to ze wskaźników. Wzrost poziomu wykształcenia ludzi młodych jest wyraźny we wszystkich państwach członkowskich, a także w krajach kandydackich. W uczącym się społeczeństwie stratyfikacja socjalna w coraz większym stopniu bazuje na podziale między tymi, którzy posiadają umiejętności i kwalifikacje, a tymi, którzy ich nie posiadają. Oczekuje się, że w ciągu najbliższych dziesięciu lat liczba osób zdo-

bywających wykształcenie wyższe podwoi się, co przeciąży wszystkie systemy edukacyjne w Europie.

Prawie we wszystkich państwach członkowskich UE poziom wykształcenia jest ważnym czynnikiem determinującym możliwość zatrudnienia.

W państwach członkowskich UE stopa bezrobocia osób z niskim wykształceniem była od 3 do 4 razy większa niż w przypadku osób posiadających wykształcenie wyższe. Natomiast w Polsce prawie 10-krotnie wyższa. Więż między poziomem wykształcenia i zatrudnienia jest jeszcze większa, w przypadku kobiet. Innymi słowy, poziom wykształcenia wpływa nie tylko na możliwość bycia bezrobotnym, lecz również na aktywność ekonomiczną w ogóle.

Interesujący jest związek pomiędzy poziomem wykształcenia, a wysokością dochodów. Ludzie legitymujący się wykształceniem wyższym uniwersyteckim (lub jego odpowiednikiem) osiągają podobne dochody (z uwzględnieniem kosztów utrzymania) we wszystkich państwach Unii Europejskiej (*Barnier M., 2001*). Zdaje się to sugerować wylanianie się jednolitego rynku absolwentów. Istnieją sygnały świadczące o wzrastającej międzynarodowej mobilności wśród młodych absolwentów, chociaż występuje jeszcze wiele trudności takich jak nietransferowalność kwalifikacji czy w szczególności trudności językowe. Możliwym efektem takiego stanu rzeczy jest tendencja do zrównywania zarobków absolwentów szkół wyższych, podczas gdy zarobki osób o niższych kwalifikacjach nadal pozostają różnicowane.

Edukacja ciągła i szkolenia mają zasadnicze znaczenie zarówno z punktu widzenia możliwości zatrudnienia człowieka, jak i utrzymania konkurencyjności współczesnej gospodarki. Wskaźnik udziału w szkoleniach waha się od 5% w około połowie państw członkowskich do ponad 20% w Holandii, Danii, Finlandii i Szwecji. Młodych pracowników szkoli się więcej, aniżeli osób w starszym wieku. We wszystkich państwach członkowskich osoby z lepszym wykształceniem mają więcej możliwości szkolenia się, aniżeli pracownicy gorzej wyedukowani.

W dostosowywaniu systemów edukacyjnych do technologii informatyczno-komunikacyjnych (ICT), wciąż pozostaje jeszcze dużo do zrobienia prawie we wszystkich krajach europejskich. Zapóźnienie w technologii informatyczno-komunikacyjnej w Polsce oceniane jest jako głębsze aniżeli w poziomie wykształcenia ludności.

*

We współczesnym świecie przodujące kraje, jak i regiony zaczynają się upodabniać do siebie pod względem branżowej struktury swoich gospodarek. Wszystkie przeżywają przesunięcie akcentu na usługi, a w sferze produkcyjnej pozbywają się sektorów i gałęzi, uważanych do niedawna za źródło ekonomicznej potęgi, społecznego dobrobytu oraz postępu naukowo - technicznego. Proces ten różnicuje popyt na:

- osoby wysoko wykwalifikowane przez gospodarki bardziej rozwinięte oraz na
- pracowników o niskich kwalifikacjach przez słabiej rozwinięte, w których produkcja koncentruje się w nisko opłacanych, pracochłonnych sektorach.

O przewadze danego kraju na scenie globalnej konkurencji coraz wyraźniej decydować będzie zdolność do wytworzenia innowacji występująca w szerszej skali w niewielu tylko krajach. Kraje i regiony o zdolnościach odtwórczych, polegających na praktycznej absorpcji innowacji, tworzą kolejną grupę światowych potentatów gospodarczych.

Centralnym, europejskim konstelacjom gospodarek o wysokiej innowacyjności towarzyszą negatywne efekty drenażu mózgowi pozbawiające peryferia, w tym kraje słabiej rozwinięte tego podstawowego czynnika rozwoju. Utrwalanie się tych trendów grozi postępującą marginalizacją wielu krajów, w tym także zaliczanych do grupy wschodzących rynków.

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EASTERN ENLARGEMENT AND THE LANGUAGE QUESTION IN THE EU

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Language as an instrument of communication and symbol (marker) of group identity¹ (of ethnic groups or nations) plays a crucial role in the life of any community. Its role is especially visible, and often problematic, in multilingual societies. One of such societies is the European Union. Enlargement of the EU reinforces the multilingual character of this community thus forcing it to adapt to the new situation.

The language question in the European Union has three aspects:

1. the EU principles of language policies addressed to member states
2. language(e) of communication with and within EU institutions
3. language(s) of communication of EU inhabitants

Principles of the EU language policies

Language issue in the European Union is considered as related to culture. Culture, in turn, is regarded as an unalienable symbol and element of national identity of member states and, therefore, is not subjected to EU-wide standardization and regulation. In practical terms, it means that any EU decision concerning culture (and language) must be taken unanimously by all member states and any member has the veto right. Such a mechanism is meant to prevent cultural domination of larger and stronger nations over smaller and weaker ones and thus to prevent cultural homogenisation. This prevention is vitally impor-

¹ Cf. *Essentially a mentifact and sociofact created by particular people living in a particular geo-political society at particular periods of history, for intra-group communication purposes, human language is a mirror and marker of self-image and group identity. An essential element of ethnicity – with religion and culture, language is a feature for both differentiation and identification* E.N. Emenanjo 2002: „Language Policies and Cultural Identities”, World Congress on Language Policy, Barcelona 16-20 d’abri 2002, www.linguapax.org/congres/indexcast.html

tant since preservation of cultural diversity (alongside with achieving of social and economic cohesion) is one of the two fundamental principles of the very idea of the European Union².

As a result, each member state carries out its language policy independently, and there are significant differences between them. The differences concern first of all the status of languages of ethnic (national) minorities in public life. Two countries of the "old" European Union are considered as not favourable, if not hostile, towards ethnic or linguistic minorities: Greece and France.

Greece³ denies existence of linguistic minorities on its territory and, consequently, fails to grant any right to its minorities (Albanians, Valahs, Macedonians, Pomaks, Turkish speaking orthodox) to use their languages in the public life: there are no legal organizations of those communities, no schools with teaching in their languages or teaching their languages, no media in their languages, let alone the use of minority languages in public administration. (The only officially recognized minority is the Muslim religious minority). Until recently even the use of minority languages in private life has been regarded as dangerous for the national unity and thus undesirable. In such circumstances linguistic minorities in Greece have been under pressure of cultural and linguistic assimilation and now their existence is considered as threatened. (Recently one may notice some ease in the attitude of the Greek authorities towards linguistic minorities, for instance there are signs that the Greek authorities acknowledge the very existence of the linguistic minorities in Greece, but maybe it is too late to save their languages).

As regards France⁴, its long centralistic tradition, and especially its idea of *état-nation* (nation state), make this country to identify French citizenship with French nationality⁵ and thus to deny existence of indigenous ethnic or national minorities and, until recently, to deny existence of non-French languages on its territory. Although French authorities recently recognize some non-French languages (called "regional languages") and admit their use in the public life to a very limited extent (in education, media, cultural events, but never in public administration or jurisdiction), but France is very reluctant to accept any internationally binding legal norms obliging it to protect or respect its ethnic or linguistic minorities.

² On the problem of cultural diversity vs. economic cohesion on the European and global scale cf. i.a. R. Szul (2002)

³ For a more detailed description of the linguistic situation and policy in Greece see: Leclerk 2003

⁴ A very good and detailed presentation of the language policy (and other aspects of ethnic problems) in France can be found in Żelazny W. 2000

⁵ On the difference between understanding of the notions „nation”, „state” etc. in France and in Central-Eastern Europe see e.g Poch 1997

As a result of the attitudes of those two countries, especially of France which is one of the co-founders of the EU, the EU (and its predecessors) has not been able to develop and adopt any common norm related to ethnic (national) or linguistic minorities. It is assumed that general human rights and the principle of legal equality of citizens are enough to protect rights of any individual person. It is, however, obvious that general human rights and formal equality of individuals fail to protect ethnic or linguistic minorities.⁶ (E.g. formal equality of access to education, information, public administration services etc. delivered in an official state language is discrimination against those citizens whose mother tongue is not that official language).

Paradoxically, the candidate countries (to join the EU in 2004, mostly from Central Europe) were obliged by the EU to fulfill the so called Copenhagen criteria (called "human dimension of the European integration") related to protection of human rights and rights of ethnic (national) minorities. The paradox is that those criteria had been developed by another institution (namely OSCE), and not by the EU itself and thus are not obliging for the "old" EU members. In such circumstances there is a legal and political uncertainty concerning obligations of the former candidate countries after becoming full EU members: will they be still obliged to stick to the Copenhagen criteria while the "old" 15 will not? If not, there will be a threat that some countries retreat from their obligations concerning protection of ethnic and linguistic minorities. (For instance, Latvia's plans to liquidate until 1 September 2004 teaching in languages other than Latvian in all secondary schools could be considered as an example of such a retreat).

Perspectives of the enlargement with the EU joined by some countries considered as unwilling towards ethnic and linguistic minorities, uncertainty of the validity of the Copenhagen criteria as well as the dissatisfaction with the present state of the affairs within the EU have forced proponents of the idea of protection of ethnic and linguistic minorities in the EU to launch a campaign to change the situation. A leading group in this campaign is the EBLUL⁷ (European Bureau for Lesser Used Languages – an NGO founded by the European Parliament in 1982 and closely co-operating with the EU). The immediate aim of this campaign is to change rules of voting on matters related to language policy in the EU institutions: from unanimous voting to qualified majority voting. It is hoped that the new way of voting will allow for overcoming the veto of such countries as France and Greece and thus for adopting EU standards of protection of linguistic (and ethnic) minorities. The campaign is addressed

⁶ On the question of human rights and their ability or disability to protect ethnic minorities see e.g.: Vizi B. 2002

⁷ More on this organisation and its activities can be found in its web-side: www.eblul.org

mainly to the European Convention which has to propose structural reforms of the European Union, called "European Constitution". Proponents of the change argue that EU standards of protection of ethnic and linguistic minorities are needed to better preserve European cultural and linguistic diversity, this diversity being a cornerstone of the very idea of the European integration, of the European identity and specificity. In doing so, proponents of EU standards of protection of linguistic minorities make reference to the Charter of Fundamental Rights adopted by the Nice summit in 2000, especially to its art. 22 which spells out that the EU shall protect, among other things, its linguistic diversity. The Charter, it is argued, should be transformed from a mere declaration into a binding law and should be complemented by specific acts, such as that one changing the voting system in matters related to language issues.

They also argue that the level of protection of ethnic and linguistic minorities in the EU is much lower than that envisaged by documents of other institutions. In this regard the Council of Europe's European Charter for Regional or Minority Languages⁸ is of special importance.

Probability of the change of the voting system as proposed by the defenders of linguistic minorities in the EU is very low. However, their campaign is worth mentioning for several reasons. First, it highlights the problem of the contradiction between the protection of cultural diversity at the national level (i.e. protection of cultures of the dominant nation in each member state from threats "from outside") and the protection of cultural diversity at regional or local level (i.e. protection of cultures of regions and minority ethnic groups from threat "from above" or, in another words, from forced assimilation). Second, it points out to the growing awareness and activity of minority ethnic groups and regional communities that can not any longer be ignored by national governments. Third, the controversy points out to deficiencies of the now dominant idea of law based solely on individual rights as opposed to the idea of collective rights. Forth, the dispute about the protection of linguistic minorities puts once again the question of the role of the European Union – whether it represents interests of governments of its member states (as until now) or it represents interest of the whole population.

When discussing the problem of protection of ethnic minorities and their languages in Europe, it should be noticed that this protection, as proposed by the EBLUL, the European Parliament and other international institutions and legal documents, only concerns so-called "traditional" or "autochthonous" minorities and languages. They exclude implicate or explicit (as in the case of the European Charter for Regional or Minority Languages) immigrants and their languages. The definition of "traditional" and "immigrant" minorities entirely depends on each country's decision. It doesn't mean that immigrants have no

⁸ for the text of the Charter and related documents see: www.coe.int/local

possibility to use their languages. On the contrary, in some countries they have developed media, education etc. The problem is that such institutions usually are only tolerated, without legal and financial support and that their scope of activity is very limited (without access to public administration, courts etc.). This unequal treatment of ethnic groups ("traditional" vs. "immigrant") raises the question of fairness and legality and can easily be regarded as racist practices. The problem of immigrants in Europe and the related problems of their cultural autonomy and linguistic rights vs. assimilation/integration is also going to grow.

Languages of the EU institutions

There are two kinds of languages in the EU institutions (European Commission, European Parliament, the Council, European Council, etc.): official languages and working languages⁹. Official languages are means of communication between the institutions and the citizens (which, i.a. implies that all language versions of documents have equal legal validity) as well as they can be used by politicians during official meetings. Working languages are instruments of daily activities of the EU bureaucracy.

As regards official languages, the general rule is that official all-national languages of all the member states become official languages of the EU. It is an "unnegotiable" principle. This principle stems from both political and pragmatic considerations. First, it symbolizes sovereignty and equality of the member states of the European Union. Second, it helps citizens of the EU to treat the EU institutions as something familiar and not alien or even hostile (it is especially important given the criticism of the "Brussels bureaucracy", its inefficiency, sluggishness, etc. and given the fact that the citizens may directly address the EU institutions). Third, it enables the citizens understand legal acts produced by the EU which is especially relevant since those acts affect the citizens directly (unlike documents produced by other international organizations which use to become internal law of its member states only after adoption by national authorities).

For a language to become an official language of the EU it is necessary to be an official all-national language of a member state and that this member state requests "EU officiality" for this language. This request is not negotiated. Other considerations, such as the number of speakers or degree of similarity to other languages, are irrelevant.

⁹ A lot of information on language policy in the EU as well as on the activity of translation service of the EU can be found in the web-side of the translation service of the EU: http://europa.eu.int/comm/translation/index_en.htm

For the above reasons the present EU-15 nominally has 12 “official” languages and practically 11 “official working” languages. The “official” languages are the following: Danish, Dutch, English, Finnish, French, German, Greek, Irish, Italian, Portuguese, Spanish and Swedish. All of them except Irish are also “official working” languages. It means that the officiality of Irish is very reduced – only occasionally some documents are translated into Irish, Irish is not a means of communication between the EU and the citizens neither it can be used by politicians during official meetings. It is so because Ireland didn’t request full officiality for Irish for obvious reasons: despite being nominally “official” and “national” language of the Republic of Ireland, it plays a role of symbol of national identity of Ireland rather than practical instrument of communication (in the latter function English is used).

So, other languages used on the territory of the EU are not official languages of the EU. Among those languages two categories deserve some comment.

One of those categories is a language being “national” but not “official” in a member state – it is Luxembourgish in Luxembourg. (Luxembourgish, earlier usually considered as a dialect of German, is the everyday instrument of communication, especially in oral form, while official language of the Great Duchy is French; the 1984 Constitution of Luxembourg calls Luxembourgish “national language”). From time to time the EU takes into account Luxembourgish, especially in linguistic education programmes.

The other category are “official regional” languages in the EU member states. One of them is Catalan¹⁰ - (co)official language of three autonomous regions of Spain: Catalonia, Balearic Islands and Valencia (in the latter under the name of “Valencian”). It is also a language spoken by other EU citizens – in parts of the region of Aragon, in the area of Rousillon in France and in the town of Alghero (Sardinia, Italy). (Catalan is also official language of Andorra, which is not a EU member). Catalan nationalists claim that Catalan is used by 10 millions of citizens of the EU, so more than speakers of Danish and Finnish. Regional Government of Catalonia (where Catalan nationalism is the strongest) has several times requested officiality for Catalan in the EU, but unsuccessfully, to the dissatisfaction and frustration of Catalonians.

With the enlargement of the European Union, nine new languages will become its official languages: Czech, Estonian, Hungarian, Latvian, Lithuanian, Maltese, Polish, Slovak, and Slovene. (Only Cyprus won’t bring in a new language because Greek is already an EU official language. Maltese was named a future EU official language in the “last minute” – earlier it seemed that Malta would not request its officiality because, in reality, Maltese plays a similar role

¹⁰ on the Catalan language and nationalism see: Balcells A. 1996

in Malta as Luxembourgish in Luxembourg, official language being, in practice, English).

So, the total number of the official EU languages is going to increase to 20 (or to 21 including Irish). This poses some technical problems, especially concerning translation and interpretation¹¹. The latter deserves a special comment. Synchronic interpretation (e.g. in the European Parliament) requires interpretation from all languages into all. Until now translators and interpreters have worked "in one way" – translating from a foreign language into one's mother tongue. It means that with the present 11 languages there was a theoretical need for 110 interpreters (and their booths) ($11 \times 10 = 110$). With the enlargement to 20 languages this need will grow to 380 interpreters. The expected accession of the EU by Bulgaria and Romania in 2007 would increase this number to 464. A possible accession by Croatia (it wants to join the EU together with Bulgaria and Romania) would further increase the need for interpreters to 506. One should not forget the aspirations of Turkey, Albania and other Balkan countries (Macedonia, Serbia and Montenegro, Bosnia and Herzegovina) each of them claiming it has its own separate language. Satisfying all those aspirations and claims would require a total number of 812 interpreters during EU summits.

To avoid such a development and, at the same time, to save the principles of language policy in the EU institutions, some technical changes are being prepared concerning the scope and way of translation and interpretation. As regards translation, the translation service presses functionaries to be more concise and produce less paper to be translated. As to the synchronic interpretation two techniques are going to be introduced or more widely implemented: "double way" and "relay". The former consists in interpreting in two directions by an interpreter (from and into a mother tongue), the latter (already implemented) means that interpreters do not translate from all languages into all, but from all into some (serving as "platform languages") and then from those "platforms" into all others. Those two techniques dramatically reduce the amount of necessary translators: for instance, due to the use of the "relay" system now in the EU summits only about 25 interpreters are needed instead of the theoretical number of 110. Implementation of the "double way" and "relay" systems is due not only to the need to reduce the number of interpreters and translators (and the costs) but also by the lack of qualified staff to translate from and into less popular languages.

It should be mentioned, however, that those two techniques have some deficiencies. First, the "relay" system implies that a speech is interpreted twice

¹¹ A more detailed description of linguistic problems related to the enlargement and steps taken by the translation service of the EU to cope with them, can be found in: Cunningham K. 2001, McCluskey B., 2001,

(from an original language into a platform and from the platform into all other languages) and thus makes the interpretation longer and increases the probability of mistakes and errors. Second, the “double way” system means that interpreters and translators will translate into foreign languages which always implies some errors and problems with foreign accent for the listeners. In sum, the new system of translation and interpretation is going to be a real challenge. If it doesn't work properly, the European Union will face a need for revising its internal language practice, namely reducing the number of official languages which will be something more than just a technical problem.

It is also worth noting that the enlargement of the number of languages will exacerbate the above mentioned “Catalan” question as most new EU languages have less speakers than Catalan (e.g. Maltese less than 400,000). It may deepen frustration and irritation of Catalonians thus influencing their attitude towards the Spanish state and the EU.

As regards working languages of the EU bureaucracy, they are, by virtue of tradition and informal rules, English and French, and recently, to a lesser extent, German. The inflow of new personnel from the new countries won't considerably change the situation as none of the new languages plays a role of “international” language. (One may guess that Russian can play some role in informal oral communication among officials from some Central and Eastern European countries). The staff from the new countries will probably strengthen the preponderance of English over other languages and further increase the role of German.

Languages of communication of EU inhabitants

Open borders and the common market of goods, capital services and labour imply growing interconnections of people (as businesspeople, workers, tourists, students, scholars, shoppers, politicians) from various countries of the EU and speaking various mother tongues. Only few of them can rely on interpreters or translators. In such a situation there is a growing need to know language(s) of possible partners or common language(s) (*lingua franca*). The choice whether to learn a foreign language and, if so, which one, depends on pragmatic reasons (only few people learn languages for mere curiosity) connected with a so called “language market”. Consequently, speakers of more popular and widespread languages are less inclined to learn foreign languages than speakers of less popular and lesser used ones. So, the percentage of inhabitants knowing a foreign language (or languages) is the highest in small countries with less internationally popular national languages, such as Luxembourg, Netherlands, Denmark, Sweden and Finland while this percentage is the

lowest in the UK and France¹². At the same time, for the same reasons, the most frequently known foreign languages are the most important international languages – first of all English (in all the EU countries) and languages of “big neighbours” (German in the Netherlands and Scandinavian countries, French in Spain and Italy). By far the most popular foreign language in the “old” EU is English. It should be noted that about ½ of the EU population declares knowledge of at least one foreign language. This percentage ranges from about 30% (UK) to more than 80% (some smaller countries).

The European Union, through its numerous educational programmes, tries to influence the linguistic situation on its territory. The main aim is to encourage learning foreign languages.¹³ In line with its philosophy of promoting cultural diversity, the EU tries to encourage and facilitate learning not just one foreign language (i.e. English) but creates conditions to learn all the official languages of the EU and even other languages (as Luxembourgish or Catalan).

Despite the attempts of the EU to offer a variety of languages as foreign languages to be learned (and known) by EU inhabitants, only three languages play a role as *lingua franca*: English, French and German, with the growing preponderance (as on the global scale) of English, and the declining position of French. In some areas of the EU, for specific linguistic conditions, the need for those three languages in internal communications is limited: e.g. the users of Danish and Swedish understand each other, almost the same can be said of Spaniards and Portuguese, Finns usually know Swedish.

It should be underlined that despite the high degree of knowledge of foreign languages, no national language of the EU countries is endangered by “invasion of foreign languages”. Even the least widespread and having the least status among them – the Luxembourgish (“national” but not “official” in its country) is still widely used in the everyday life and, more importantly, its social prestige and status is growing. (The same cannot be said of regional languages threatened by national languages in their respective countries). The use of foreign languages is limited to contacts with foreigners. Foreign languages do not push out national languages in their role of intranational means of communication.

The eastern enlargement of the EU will probably not produce dramatic changes in the above pictures. What seems to be sure is the need to improve the knowledge of “western” languages in the eastern part of the EU. One can expect further strengthening of the position of English as a EU-wide *lingua franca* and a consolidation of the role of German in Central Europe. (A minor improvement

¹² cf. results of an Eurobarometer investigation in 2001:

www.europa.eu.int/comm/education/policies/lang/languages/lang/eurobarometer54_en.html

¹³ For more information see

www.europa.eu.int/comm/education/policies/lang/languages_en.html

of the position of French can be brought about by the accession of Romania). For sure Czechs and Slovaks won't need an intermediation or translation. It is interesting if Poles on the one hand and Czechs and Slovaks on the other will communicate directly (using their own languages) or (and in which circumstances) will need English or German as a common language. Another question is the role of Russian in the contacts among inhabitants of Lithuania, Latvia and Estonia. Of course, the EU will extend its linguistic education programmes to its new member states and will include the new languages in its offer.

Conclusion

The enlargement of the European Union is not going to produce immediate dramatic effect on the linguistic situation of the vast majority of its inhabitants. The principle of national sovereignties in matters related to culture and language and the linguistic inertia will continue to protect national cultures and languages from invasions and replacement by foreign languages.

However, some changes will probably be sensible. The most important and immediate is going to be the impact of the enlargement on the functioning of the EU institutions and their translation services. These will have to adopt new techniques of translation and interpretation. If these techniques fail to preserve high quality functioning of these services and smooth working of the institutions, a shortening of the number of official languages will be advisable. Such shortening would, however, provoke political tensions within the Union.

The enlargement of the EU and the consequent inclusion of new languages as official languages of the Union will increase the number of official EU languages whose number of users is lower than the number of users of some regional languages not enjoying the status of "official languages of the EU". Out of the future 20 official languages (excluding Irish) the number of speakers of eight doesn't exceed 6 millions (Danish, Finnish, Estonian, Latvian, Lithuanian, Slovak, Slovene and Maltese), while the number of users of Catalan is estimated at 7-10 millions (depending on methodology of estimation). It has already provoked dissatisfaction on the side of Catalan nationalists demanding official EU status for Catalan. This dissatisfaction can only grow. Catalan demand can not be satisfied without the change of the principle of the EU that its members are only states and not regions or "ethnic nations" or without the change of the status of Catalonia (or of any other Catalan-speaking region) in the Spanish state. It seems therefore that Catalan linguistic and political demands are going to be present in the political life of Spain and the EU. Possible successes of Catalonians would encourage other ethno-regionalist (nationalist) movements.

Intensification of relationships between the new member states and the rest of the EU will strengthen popularity and knowledge of the most important

international languages, first of all English, and then German, in the former countries. It will be probably accompanied by a steady decline of the knowledge of Russian.

Growing popularity and knowledge of English or other “western” languages in the new EU member states are, however, not likely to replace local national languages in their role of means of communication and symbol of national identity. Of course, one can not exclude appearance (or enlargement) of places where other languages are used (for instance residential districts populated by immigrants). Massive replacement of national languages by an “EU-wide language” would require a concentrated deliberate language policy, similar to policies carried out by some governments in the 19th and 20th centuries inspired by the “one-nation-one-state-one-language” (or “one-nation-one-leader-one-language”, etc.) ideology. Emergence of such an ideology would require appearance of a pan-European nationalism which is unlikely in the foreseeable future.

Less clear than the fate of national languages in the EU is the fate of regional or minority languages and the attitude of the EU towards them. All options are possible: from extinction to revival and strengthening. The final outcome will, to a large extent, depend on whether the European Union will directly engage in ethnic minority protection, and on the “mood” within the EU institutions, within national and regional governments and among speakers of minority languages themselves. It is hard to predict the evolution of this “mood” as it is a result of a complex of political, psychological, sociological, economic etc. factors.

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Streszczenie

ROZSZERZENIE NA WSCHÓD A KWESTIA JĘZYKOWA W UNII EUROPEJSKIEJ

Kwestia językowa w Unii Europejskiej ma trzy aspekty: 1) ogólne zasady polityki językowej adresowane do państw członkowskich, 2) języki instytucji unijnych i kontaktu instytucji z obywatelami Unii, 3) języki kontaktów między mieszkańcami Unii.

Najważniejszą zasadą w UE jest suwerenność państw w sprawach kultury i języka. Decyzje na szczeblu unijnym mogą zapaść tylko jednomyślnie. Zasada ta broni idei różnorodności kulturowej Europy przed uniformizacją. Brak ogólnounijnych norm polityki językowej, zwłaszcza w stosunku do mniejszości językowych i występują duże różnice pomiędzy krajami w tej dziedzinie. Najgorsza sytuacja tych mniejszości spośród „starych” członków Unii jest w Grecji i Francji. Dla poprawy sytuacji mniejszości w obecnych i przyszłych krajach Unii przedstawiciele mniejszości proponują zmianę zasady głosowania w sprawach języka w UW – przejście na głosowanie kwalifikowaną większością w celu złamania weta i przyjęcia ogólnych norm ochrony mniejszości językowych.

W UE obowiązuje zasada, że jej językami oficjalnymi są wszystkie ogólnopństwowe oficjalne języki krajów członkowskich. Wynika to z równości państw członkowskich i wizerunku Unii jako przyjaznej dla obywateli. Po rozszerzeniu Unii liczba tych języków wzrosła z 11 do 20. Spowoduje to problemy, zwłaszcza związanych z tłumaczeniem. Jeśli jakość tłumaczenia obniży się i osłabi sprawność funkcjonowania instytucji, nastąpi potrzeba rewizji zasad używania języków w UE, co może wywołać problemy polityczne.

Intensyfikacja kontaktów międzyludzkich w UE powoduje wzrost potrzeby znajomości języków obcych. Średnio w „starej” UE ok. 1/2 mieszkańców deklaruje zna-

jomość co najmniej jednego języka obcego. UE w swoich programach edukacyjnych lansuje model wielojęzycznych mieszkańców. W praktyce najpopularniejszym językiem obcym jest angielski.

Integracja europejska nie spowoduje wyparcia języków narodowych przez międzynarodowe. Mniej wyraźna jest przyszłość mniejszości językowych. Wszystkie scenariusze są możliwe: od wymarcia języków mniejszości do ich utrzymania i rozwoju.

The first of these is the need to ensure that the nursing profession is seen to be a profession in its own right. This involves a number of factors, including the development of a strong professional identity, the establishment of a regulatory body, and the promotion of a public service ethos. The second is the need to ensure that the nursing profession is seen to be a profession that is committed to the highest standards of care and ethics. This involves the development of a strong code of ethics, the establishment of a regulatory body, and the promotion of a public service ethos. The third is the need to ensure that the nursing profession is seen to be a profession that is committed to the highest standards of education and training. This involves the development of a strong curriculum, the establishment of a regulatory body, and the promotion of a public service ethos.

QUALITY OF THE ENVIRONMENT AND LIFE EXPECTANCY IN EUROPE

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Indicators of sustainable development

In the face of deterioration of the environment occurring world-wide and consequent worsening of ecological living conditions, these are mostly highly developed countries and international organisations who make attempts at working out uniform criteria suitable for evaluation of sustainable development level. These criteria have been named 'indicators of sustainable development'. System of short-term indicators prepared by the OECD has found wide application in comparative studies on the international basis.

Indicators of sustainable development available from published statistical research works were used in this study. Depending on availability of the data, they refer to the one-year period of 1996-2000. All values were analysed following conversion into the units comparable in all the European countries under study. Their selection was based on availability of the data. However, many figures and particularly those related to the emission of impurities and river water pollution levels could not be compared for lack of uniform monitoring system and method of their presentation.

The aim of this study is to determine correlation between sustainable development level and subsequent life expectancy.

The following indicators have been used:

- Environment protection expenditures i.e. investment outlays and current costs in the public sector, and in the industry (Euro, per capita),
- Share of population being served by waste water municipal treatment plants as percentage of total population of the country,
- Emission of carbon dioxide accompanying power generation (tonnes per capita),
- Emission of nitrogen oxides (kg per capita),

- Consumption of mineral or chemical fertilisers in terms of pure ingredient (in kg per hectare of arable land),
- Forest areas (hectares per 1000 residents),
- Major protected areas (hectares per 1000 residents).

An assumption was made that the above mentioned indicators reflect the level of ecological development of particular country – resulting from the long-term processes of social and economic development. In this study, they were assumed to be dependent variables. In turn, life expectancy is considered an independent variable.

Interrelations between life expectancy and the indicators of sustainable development were determined by means of correlation and regression analysis with aid of the Curve Expert statistical computer programme. The study has been carried out basing on a set composed of 25 to 30 objects i.e. those European countries where relevant statistical data were both available (published) and comparable.

Determination of correlation between life expectancy and quality of the environment and cost of its protection

Life expectancy depends on many factors. Economic development level and related investment outlays for health service and the environment are among the most important ones. Moreover, social, geographic and genetic conditions (Michalski, 2000) as well as ecological, chiefly resulting from sustainable development level, are also significant.

The data applying to the last year of the 1996 – 2000 period were used for the analysis of life expectancy. Life expectancy regarding the people born in 1996 – 2000 was calculated as a corrected average value using coefficients resulting from the difference in span of life for women and men - on assumption that the death rates would remain at the existing level.

An analysis of life expectancy concerning people born in the European countries under study at the end of the nineties of the twentieth century or in 2000, allows to distinguish three groups of countries (Fig. 1). The first group includes the UE member states, with Switzerland and Norway where life expectancy is estimated at above 75 years (Portugal) and reaching nearly 80 years (Switzerland and Sweden). Moreover, residents of these countries are likely to live even longer. Russia, Ukraine and Belarus feature the worst situation where life expectancy figures amount to 66.2, 68.0 and 68.1 respectively. Remaining countries, where life expectancy is estimated at over 69 years (Latvia) up to around 76 (Slovenia) – form an intermediate group between these two. Nevertheless, all countries created on territories of the former Soviet Union as well as Romania and Bulgaria life expectancy concerning age-groups born at the end of the nineties of the twentieth century grows shorter (Michalski, 2000).

Fig. 1. Average life expectancy in selected European countries (source: Statistical Yearbook 2001)

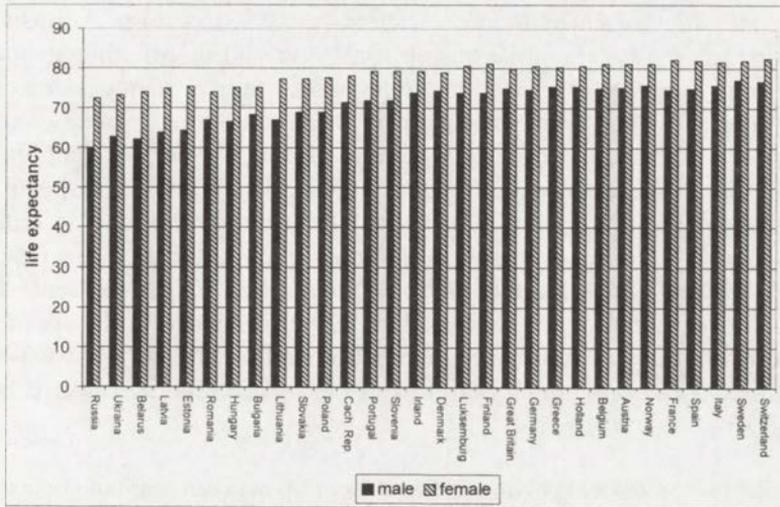
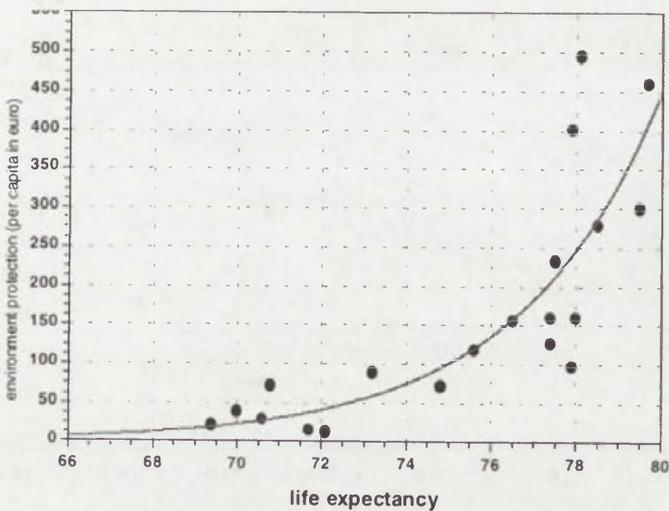


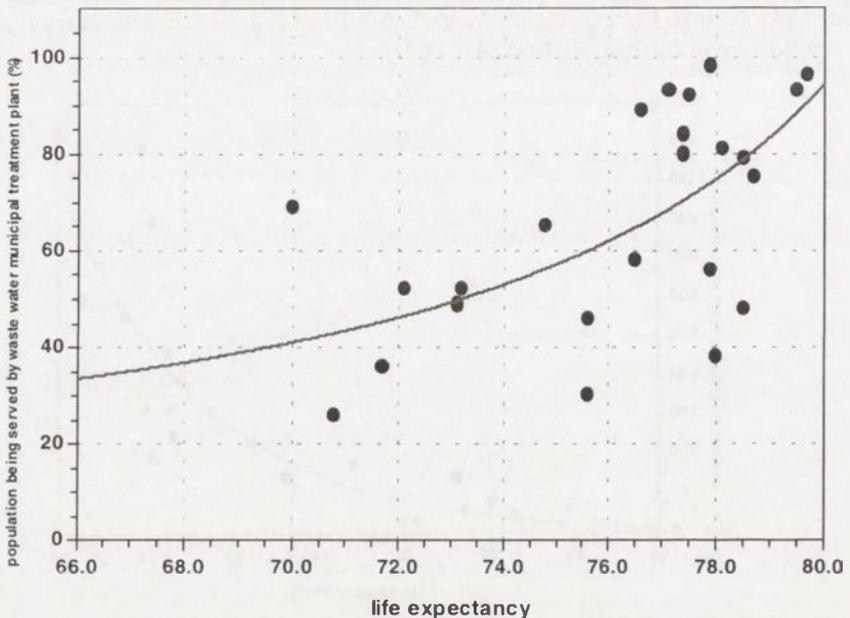
Fig. 2. Regression model applying to the relationship between environment protection expenditures i.e. investment outlays and current costs in the public sector, and in the industry and average life expectancy (source: Statistics in focus: Environmental protection expenditure in Europe, EUROSTAT, 2001).



Geometric Fit: $y = 1.486x^{0.056x}$
 Correlation Coefficient: 0.8209

Among the values under study, the relationship between life expectancy and the outlays on environment protection in the industry and the public sector features the highest correlation coefficient ($r = 0.821$) – Fig. 2. Basing on the regression model for this relationship it may be said that the bigger investment outlays on environment protection the higher is life expectancy. For example, in Switzerland – where life expectancy is the highest, these outlays amount to Euro 459 per resident, while in Sweden – Euro 300 per resident. Instead, in Poland, Czech Republic and Hungary – Euro 90, 73 and 73 respectively. Lowest investment outlays on environment protection are found in Lithuania – hardly Euro 13 per resident, and in Belarus – around Euro 15 per resident. Somewhat higher figures are recorded in Latvia (Euro 22 per resident), Romania (Euro 29 per resident) and Estonia (Euro 39 per resident). In the countries where investment outlays on the environment protection are at the lowest level, life expectancy is not only among the lowest but is also tending towards becoming even less.

Fig. 3. Regression model applying to the relationship between share of population being served by waste water municipal treatment plants as percentage of total population of the country, and average life expectancy (*source: Statistics in focus: Waste water in European countries, EUROSTAT, 2001*).

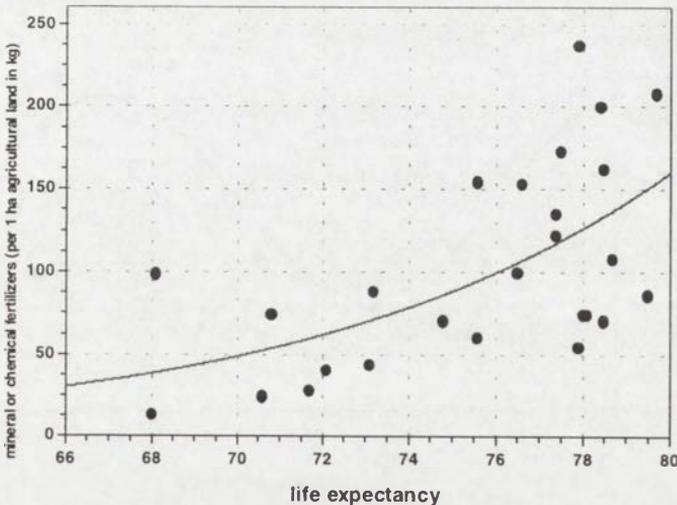


Reciprocal Model: $y = 1 / (-0.001x + 0.120)$

Correlation Coefficient: 0.5943

There are also significant relationships between life expectancy and sewage treatment (Fig. 3). Even though construction of sewage-treatment plants is closely connected with the investment outlays on environment protection, correlation coefficient is somewhat lower ($r = 0.594$) than that applying to the environment protection ($r = 0.821$). Basing on the regression model it can be said that the larger share of the population is provided with sewage-treatment plant services the bigger is life expectancy. In Switzerland and Sweden – the countries with highest average life expectancy – percentage of the population having the use of sewage-treatment plant is very high (over 90%). One may say that except for Portugal, Spain and Greece, where respectively 46, 48 and 56% of the population are provided with the services of sewage-treatment plants, this figure exceeds 75% in the remaining EU countries, while in Switzerland it is as much as 96%. Unfortunately, no data were available for Belarus, Latvia, Russia, Romania and Ukraine where the situation is certainly much worse than that found in Hungary and Slovenia with only 26% and 30% of the population provided with sewage-treatment plant services. In Poland - considerable improvement was accomplished in the recent years (Degórska, 1999). However, percentage of the population provided with sewage-treatment plant services is still low (52%).

Fig. 4. Regression model applying to the relationship between consumption of mineral or chemical fertilisers, and average life expectancy (source: *FAO Yearbook. Fertilizer 1999, FAO, 2001, according Roczniak Statystyczny, 2002*).

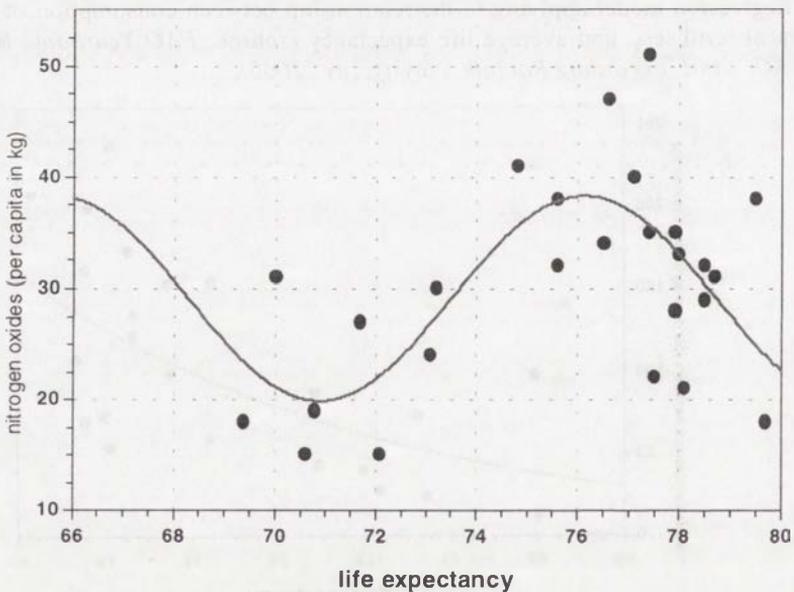


Exponential Fit: $y=0.012e^{0.119x}$

Correlation Coefficient: 0.5888

An analysis of the relationship between consumption of mineral and chemical fertilizers and average life expectancy has confirmed their interdependence with correlation coefficient $r = 0.589$. (Fig.4). In most countries where consumption of fertilizers is high also life expectancy figures are among the highest (such as the Netherlands - 236 kg/hectare, Switzerland – 208 kg/hectare, France - 164 kg/hectare of arable land). Nevertheless, in several countries where life expectancy is also high, consumption of fertilizers is less than that in Poland (Sweden – 86 kg/hectare, Spain – 70.3 kg/hectare, and Portugal – 60 kg/hectare of arable land). However, except for Belarus (where consumption of fertilizers amounts to 98 kg/hectare of arable land) in most countries of Central and Eastern Europe consumption of fertilizers is relatively low (eg. Poland - 87 kg/hectare, Czech Republic - 70 kg/hectare, Hungary - 74 kg/hectare of arable land) or very low (Romania - 24 kg/hectare, Bulgaria - 27 kg/hectare of arable land). The form of regression curve indicates that the higher is consumption of mineral and chemical fertilizers per 1 hectare of arable land the bigger is average life expectancy.

Fig. 5. Regression model applying to the relationship between emission of nitrogen oxides, and average life expectancy (*source: OECD Environmental Indicators. Towards Sustainable Development. OECD, 2001 (according: Ochrona Środowiska, 2001)*)

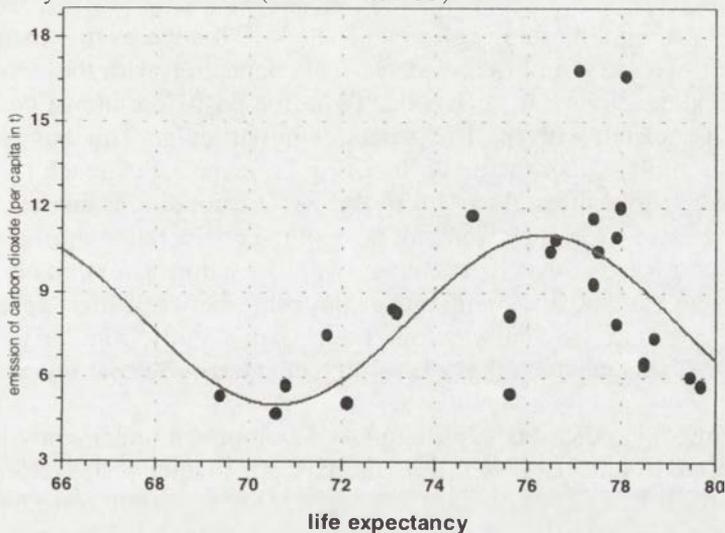


Sinusoidal Fit: $y=29.148+9.211* \cos(0.602x - 33.228)$

Correlation Coefficient: 0.6716

Interdependence between air pollution levels and life expectancy was ascertained in this study. As regards emission of nitrogen oxides, the correlation coefficient is 0.672 (Fig. 5) and is somewhat higher than that for carbon dioxide ($r = 0.617$) – Fig. 6. Emission of these two pollutants is very low in Switzerland, while also in the majority of the countries featuring highest average life expectancy figures, emission of carbon dioxide is very low as well. In turn, it is relatively difficult to establish similar relationship in respect of nitrogen oxides since high emission levels are recorded both in many countries featuring high life expectancy and in certain countries of Central and Eastern Europe. As regards countries producing largest amounts of nitrogen oxides (exceeding 40 kg per resident) and carbon dioxide (exceeding 10 tonnes per resident) their life expectancy falls into a range from about 74 to 78 years and increases after reduction of emissions only.

Fig. 6. Regression model applying to the relationship between emission of carbon dioxide, and average life expectancy (*source: OECD Environmental Indicators. Towards Sustainable Development. OECD, 2001 (according: Ochrona Środowiska, 2001)*)
Sinusoidal Fit: $y=8.035+3.005*\cos(0.551x - 29.455)$



Correlation Coefficient: 0.6165

Interdependence between life expectancy and the area of nature preservation territories per resident as well as forest area per resident in a given country was also studied. In both cases, correlation coefficients after regression model optimisation were very low ($r = 0.197$ in respect of protected areas, and $r = 0.292$ in respect of forest areas). Even though closer contacts of the humans

with nature are today strongly recommended, nevertheless, basing on statistical analysis, no direct effect on life expectancy could be determined.

Summary

Political division of Europe that took effect after the Second World War, has had decisive impact on the existing sustainable development level of individual countries. Countries of the Western Europe were first to perceive the necessity of financing environment protection. First of all, investments were made in pro-ecological infrastructure as well as land reclamation and most recently - in nature revival of the most deteriorated areas. This study shows that expenditures on environment protection are closely related to life expectancy as increasing investment outlays result also in higher life expectancy index.

From among the European countries under study unfavourable situation regarding both sustainable development level and life expectancy exists in the post-Communist countries and in Russia, Ukraine and Belarus in particular. In the countries where life expectancy is lowest, the necessity to invest in environment protection and adopt pro-ecological policies, as well as the need for suitable education are often neglected. Therefore, it appears that extreme threat to health or even to life of the residents – in connection with the very low level of ecological development - exists mainly in the post-Communist countries and those not associated with the UE structures in particular. This has been confirmed by this study. Other factors influencing life expectancy, such as: economic safety, quality of health service, lifestyles, genetic conditions are also of certain significance. However, they were not taken into consideration during this study.

Despite it is believed that contact with the nature is extremely important for health, no statistically significant relationship between life expectancy and forest area per one resident was found during this study. Similarly, no dependence of life expectancy on the area of protected territories per one resident was found.

Among the indicators of sustainable development under study investment outlays on environment protection is the factor influencing life expectancy the most. Aside from analysed indicators, other elements – not considered in this paper – have also an effect on life expectancy: eg. food habits, genetic conditions or quality of health service. However, the latter is directly connected with wealth of a country – like the outlays on environment protection.

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Streszczenie

JAKOŚĆ ŚRODOWISKA A PRZECIĘTNE DALSZE TRWANIE ŻYCIA W EUROPIE

Polityczny podział Europy jaki nastąpił w wyniku drugiej wojny światowej, wpłynął w sposób decydujący na obecny poziom ekorozwoju poszczególnych państw. Kraje Europy Zachodniej jako pierwsze dostrzegły potrzebę finansowania ochrony środowiska. Inwestowano przede wszystkim w rozwój proekologicznej infrastruktury. W niniejszej analizie wykazano, że wydatki na ochronę środowiska wykazują silny związek z oczekiwaną długością życia, gdzie wraz z wzrastającymi nakładami inwestycyjnymi wzrasta także wskaźnik dalszego trwania życia.

Spośród analizowanych państw europejskich niekorzystna sytuacja zarówno pod względem poziomu ekorozwoju jak i oczekiwanej długości życia występuje w państwach postkomunistycznych, a zwłaszcza w Rosji, na Ukrainie i Białorusi. W państwach o najkrótszym przeciętnym trwaniu życia często jeszcze nie dostrzega się potrzeby inwestowania na rzecz ochrony środowiska, prowadzenia polityki ekologicznej, a także edukacji w tym zakresie. Wydaje się zatem, że głównie w państwach postkomunistycznych, a zwłaszcza niestowarzyszonych ze strukturami Unii Europejskiej, istnieje największe zagrożenie dla zdrowia, a zatem także i długości życia, co zostało potwierdzone w niniejszej analizie. Nie bez znaczenia są także inne czynniki wpływające na długość życia jak np.: bezpieczeństwo ekonomiczne, poziom usług medycznych, styl życia, uwarunkowania genetyczne, które jednak nie były przedmiotem badań.

W niniejszej analizie stwierdzono brak istotnych statystycznie współzależności pomiędzy oczekiwaną długością życia a powierzchnią lasu przypadającą na mieszkańca, pomimo że dla zdrowia niezwykle ważny wydaje się kontakt z przyrodą. Podobnie nie stwierdzono zależności pomiędzy powierzchnią obszarów chronionych przypadającą na 1 mieszkańca a przeciętnym dalszym trwaniem życia.

Spośród analizowanych wskaźników zrównoważonego rozwoju głównym czynnikiem wpływającym na oczekiwaną długość życia jest wielkość nakładów inwestycyjnych na ochronę środowiska.

The first part of the study was a descriptive analysis of the living environment and the quality of life of the respondents. The second part was a regression analysis of the living environment and the quality of life of the respondents. The third part was a cluster analysis of the living environment and the quality of life of the respondents. The fourth part was a principal component analysis of the living environment and the quality of life of the respondents. The fifth part was a factor analysis of the living environment and the quality of life of the respondents. The sixth part was a discriminant analysis of the living environment and the quality of life of the respondents. The seventh part was a correspondence analysis of the living environment and the quality of life of the respondents. The eighth part was a correspondence analysis of the living environment and the quality of life of the respondents. The ninth part was a correspondence analysis of the living environment and the quality of life of the respondents. The tenth part was a correspondence analysis of the living environment and the quality of life of the respondents.

QUALITY OF THE LIVING ENVIRONMENT AND THE QUALITY OF LIFE

The quality of the living environment and the quality of life are two concepts that are closely related. The quality of the living environment refers to the physical and social conditions of the environment, while the quality of life refers to the subjective well-being of the individual. The quality of the living environment is a key determinant of the quality of life, and it is important to understand the relationship between the two concepts. This study aims to explore the relationship between the quality of the living environment and the quality of life of the respondents. The study is divided into ten parts. The first part is a descriptive analysis of the living environment and the quality of life of the respondents. The second part is a regression analysis of the living environment and the quality of life of the respondents. The third part is a cluster analysis of the living environment and the quality of life of the respondents. The fourth part is a principal component analysis of the living environment and the quality of life of the respondents. The fifth part is a factor analysis of the living environment and the quality of life of the respondents. The sixth part is a discriminant analysis of the living environment and the quality of life of the respondents. The seventh part is a correspondence analysis of the living environment and the quality of life of the respondents. The eighth part is a correspondence analysis of the living environment and the quality of life of the respondents. The ninth part is a correspondence analysis of the living environment and the quality of life of the respondents. The tenth part is a correspondence analysis of the living environment and the quality of life of the respondents.

HEALTH SITUATION IN POST-COMMUNIST EUROPEAN COUNTRIES WHICH ARE CANDIDATES

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Introduction

The European Union authorities divided post-communist European countries into three groups: (1) those which in 2004 (most likely) will become its members, (2) those which have such a chance by 2010 and (3) those which have not initiated the negotiations yet. The division of these countries was made according to economic, political and social criteria. This division is illustrated by Fig. 1.

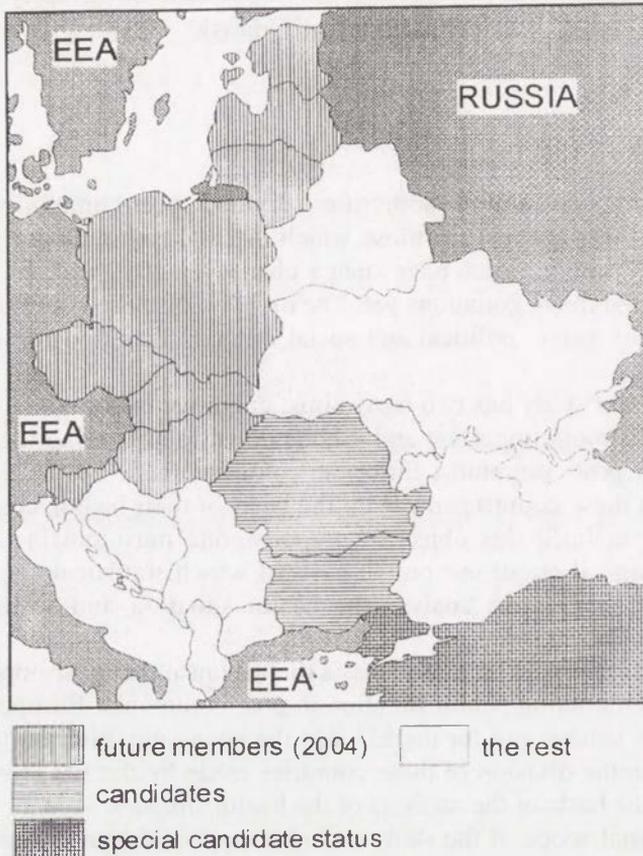
The present study has two basic aims: cognitive and methodological. The cognitive aim is more important and it boils down to answering the question: is the division of post-communist European countries made by the EU similar to the division of these countries made on the basis of their health situation? However, in order to fulfil this objective properly, one must satisfactorily answer two methodological questions: on the basis of which statistical data (including: how credible) should one analyse the health situation and which analytical method should one apply?

The study is based on a hypothesis that because the most important group of factors differentiating health situation in post-communist European countries is of economic nature, and for the EU also the economic criterion was the most important, then the division of these countries made by the EU is similar to the one made on the basis of the analysis of the health situation.

The spatial scope of the study includes the former union republics of the former USSR (Estonia, Latvia, Lithuania, Belarus, Moldova, Ukraine), the former European satellite countries of the former USSR (Poland, the Czech Republic, Slovakia, Hungary, Rumania, Bulgaria), the former union republics of the former Yugoslavia (Slovenia, Croatia, Serbia and Montenegro, Macedonia, without Bosnia and Herzegovina, for which there are no credible data) and Albania. The temporal scope is limited to the year 2000 (in a few cases data from 1998 or 1999 were used). The data used in the study come from databases

made available by the WHO Copenhagen Regional Office and the World Bank (Washington), sometimes they were completed with the data coming from national statistical yearbooks.

Fig. 1. Division of post-communist European countries according to their eligibility to join the European Union



Methods of work

The first stage was to choose appropriately variables describing the health situation. This stage of the analysis is always problematic since almost always there is a discrepancy between the data which should be included in the analysis and the available ones. An additional problem is a danger of excess. Basing on publications describing variables included in analyses of a health situation (see Cz. Andryszek, 1993; L. Dumitrache, I. Armas, 1998; T. Dutkiewicz et al., 1997; A. A. Keller, W. I. Kuvakin, 1998; G. Moon, 1994, L. T. Szewczuk,

1997), finally eight variables were chosen: life expectancy at birth [in years]; female–male difference in life expectancy [in years]; SDR of circulatory system [per 100000]; SDR malignant neoplasms [per 100000]; infant deaths [per 1000 live births]; tuberculosis incidence [per 100000]; viral hepatitis B [per 100000]; syphilis incidence [per 100000]. The level of correlations (Pearson) between the variables was average or low.

An incredibly vital issue is the quality of statistical data and methods of finding mistakes appearing in them. Literature on the subject is extensive (see O. Devine, R. G. Parrish, 1998; C. P. Farrington, A. D. Beale, 1998). Yet, the lack of good studies on this subject by medical statisticians from the former USSR is puzzling. It is the statistical data from this area (plus Bulgaria and Rumania) that raise the most doubts as to their credibility. Finally, it is assumed in the analysis that statistical data coming from Albania, Belarus and partially Moldova and Ukraine are questionable due to generally practised there “improving on” the statistics (a claim based on informal talks with researchers from these countries). Also questionable are statistical data coming from Serbia and Montenegro as well as from Macedonia (in this case it results from recent wars in the region and the fact that national governments do not have control over the whole area of these countries).

Fig. 2. Division of post-communist European countries according to their health situation (Ward’s method, Euclidean distance).

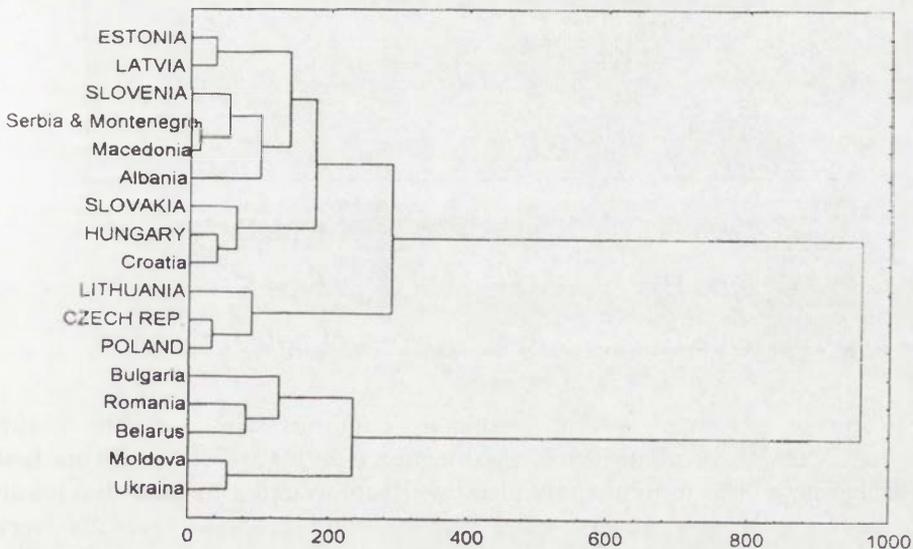
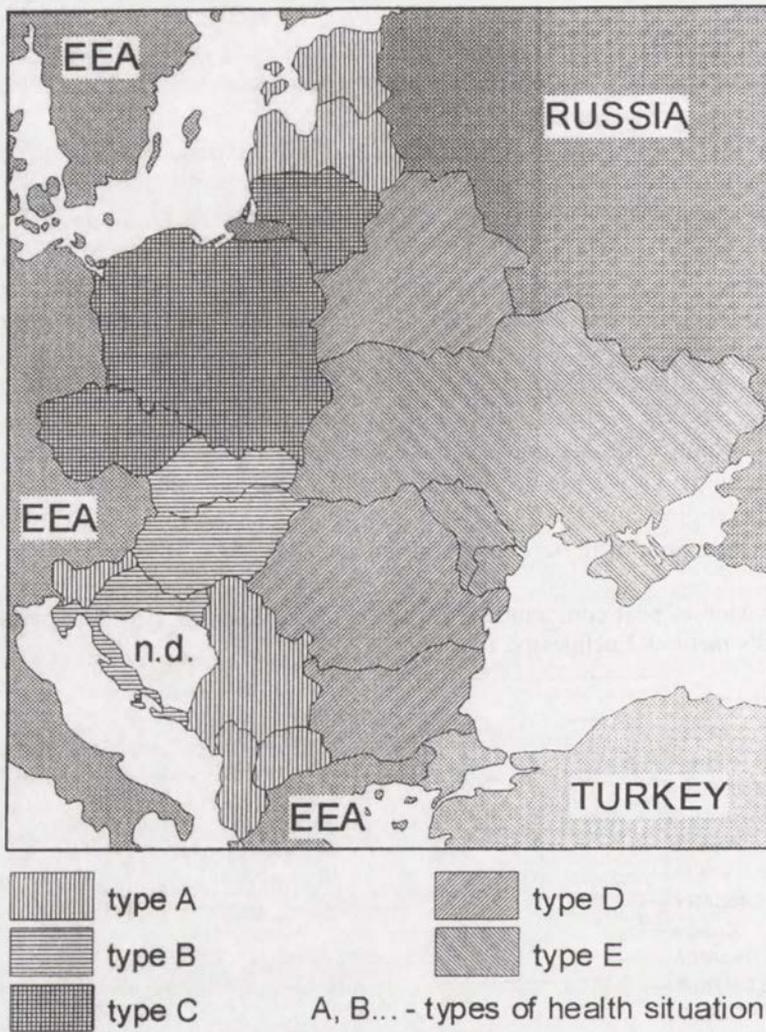


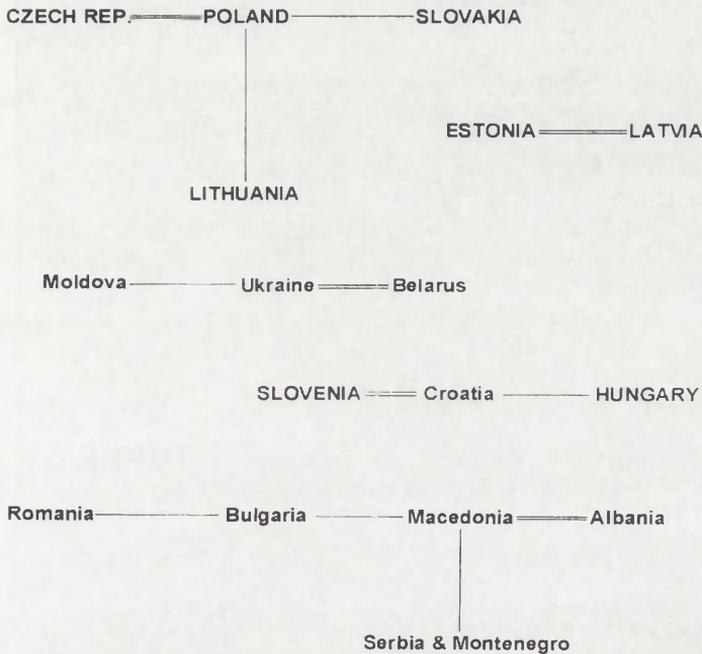
Fig. 3. Division of post-communist European countries according to their health situation (on the basis of results from Fig. 2.).



The second stage was differentiating countries with a similar health situation. Methods of multi-factor classification (see J. Parysek, 1982) are best applicable here. The present study also uses them (Ward's method, Euclidean distance). The results are presented in Fig. 2. and 3. Similar results were achieved by using other multi-factor classification methods by grouping. The comparison of Fig. 1 and Fig. 3 shows completely incompatible groups of analysed countries. Because such big differences between the division made by the EU and the division based on a health situation are rather unlikely,

a multivariable analysis method was used. In order to do so, first Kendall's tau correlation matrix between countries was built, and then, using Mc Quitty's method, cores were isolated to which other countries were added (Fig. 4.). Although this method is more applicable to reduce the number of variables used in an analysis (see J. Runge, 1992), it seems to be equally successful also for other purposes. The comparison of Fig. 1 and Fig. 5 shows that the achieved result is satisfactory.

Fig. 4. Division of post-communist European countries according to their health situation (tau Kendall correlation matrix and Mc Quitty's method).

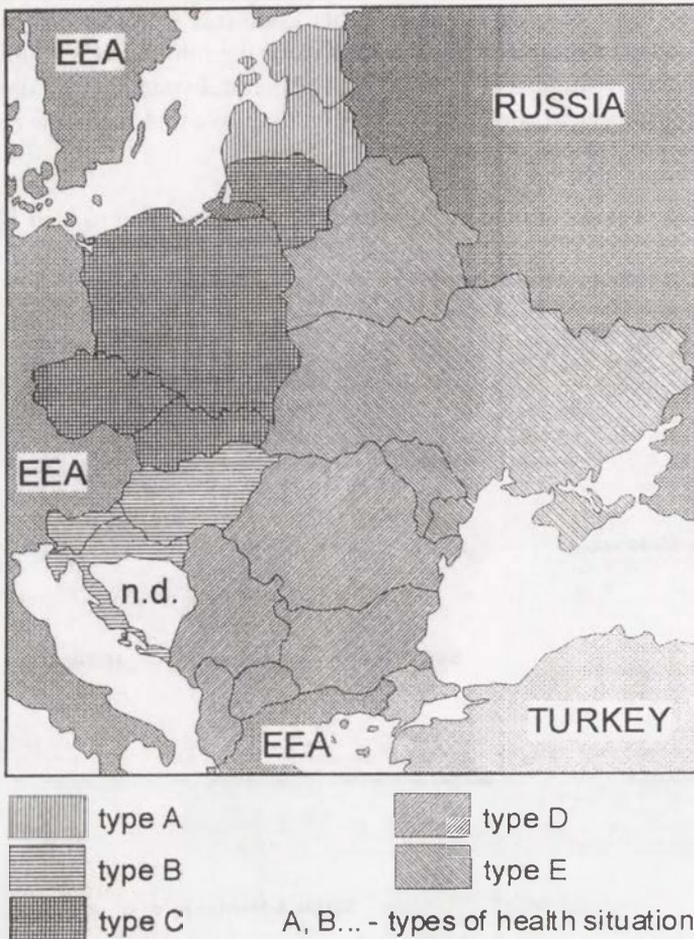


Analysis of health situation

A division of post-communist European countries according to their health situation was taken for the analysis. The division was made on the basis of the correlation matrix method (Kendall's tau) and Mc Quitty's method.

Five groups of countries with distinct types of health situation were differentiated (Fig. 4. and 5.). Type A comprises Estonia and Latvia. They are characterized by high female-male difference in life expectancy; average SDR of circulatory system and infant deaths, high syphilis incidence and very high viral hepatitis B.

Fig. 5. Division of post-communist European countries according to their health situation (on the basis of results from Fig. 4.).



Type B comprises Hungary, Slovenia and Croatia. They are characterised by high life expectancy at birth, but very high SDR malignant neoplasms, with simultaneous very low infant deaths and syphilis incidence.

Type C comprises four countries: Lithuania, Poland, the Czech Republic and Slovakia. Their common characteristics are high life expectancy at birth and low infant deaths, low or very low SDR of circulatory system and low tuberculosis incidence (except for Lithuania with a very high level).

Type D is numerous, it comprises Rumania, Bulgaria, Macedonia, Serbia and Montenegro, Albania. They are characterised by average life expectancy at birth and a small female–male difference in life expectancy, very low infant deaths and very low SDR malignant neoplasms.

Type E comprises: Belarus, Ukraine and Moldova. They are characterised by short life expectancy at birth and very high infant deaths, with simultaneous low viral hepatitis B, high tuberculosis incidence and very high syphilis incidence.

The worst health situation of a society is characteristic of countries included in type D. The best one is in countries included in types A and C. The average one is in countries qualified in types B and E. These countries were included in average types for a variety of reasons. Whereas with reference to Latvia and Estonia the reason lies in an average economic situation and the appearance in these countries of negative health trends observed in all countries of the former USSR (although in other countries appearing with a much stronger intensity - STD and STI as well as high infant deaths are particularly referred to here), in the case of countries from type D an average health situation stems from an interaction between the economic situation and cultural influences. Poor economic situation would probably cause poor health situation. However, cultural influences, primarily better eating habits, result in a better health situation than one might expect. This is particularly visible with reference to SDR malignant neoplasms, and less so with reference to SDR of a circulatory system).

There is a distinct correlation between the division made by the EU and the division according to health situation. Countries belonging to types A and C will all become new members of the European Union. Yet, from the countries included in group B only Croatia will not become an EU member soon. In this case, however, the reason is not in the economic or social situation, but in political conditions (a recent war and a nationalist policy of the former president).

Countries included in type D are Balkan states with similar living conditions. What differentiates them politically is recent wars (Macedonia, Serbia) and considerable riots (Albania). These negative phenomena appeared on a much lesser scale in Rumania and Bulgaria.

Countries with a health situation of type E are countries of the former Soviet Union which to this day have not implemented any significant social, political and economic reforms, and which currently have a much worse economic situation. They have no chances to become soon members of the European Union.

Conclusions

In course of the carried out analysis, there appeared to be a very high interdependence between the results and the adopted analytical methods. Still, if one takes reasonable diagnostic variables, their possible changes do not significantly influence changes in the analysis. It is so because a bad (or good) health situation does not appear selectively. This means that there are hardly any cases

when in one aspect the health situation of a given society is very good, while in another one it is very bad. True, there are exceptions to this rule (mainly stemming from cultural differences) but they are very rare. Still, a separate issue is the credibility of statistical data.

Adopted for the analysis division of post-communist European countries according to their health situation (Kendall's tau correlation matrix and Mc Quitty's method) is largely compliant with a division of these countries made by the European Union. It is not surprising since the EU divided these countries mainly according to economic criteria. This is economic factors that influence the strongest a differentiation of a health situation in the region (see T. Michalski, 2001), while cultural factors are of secondary importance. Within the next few years (after several countries of the regions join the European Union) one should expect further differentiation in the health situation between new EU members and the remaining states. The worst situation will invariably be in the countries of the former USSR which have no chances to join the EU in the foreseeable future.

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Streszczenie

SYTUACJA ZDROWOTNA W KRAJACH KANDYDACKICH POSTKOMUNISTYCZNEJ EUROPY

Praca opiera się na hipotezie, że ponieważ najważniejsza grupa czynników różnicujących sytuację zdrowotną w europejskich państwach postkomunistycznych jest natury ekonomicznej, a według Unii Europejskiej również kryterium ekonomiczne było najważniejsze – zatem podział tych państw w oparciu o analizę sytuacji zdrowotnej powinien być zbliżony do klasyfikacji dokonanej przez Unię Europejską.

Zakres przestrzenny opracowania obejmuje obszar byłych europejskie państw socjalistycznych (bez Rosji, NRD oraz Bośni i Hercegowiny). Zakres czasowy ograniczono do 2000 r. (w nielicznych przypadkach użyto danych dla 1998 lub 1999 r.). Do analizy wzięto osiem zmiennych diagnostycznych, ostatecznie do wyróżnienia zbliżonych typów zdrowotnych zastosowano macierz korelacji (tau Kendalla) i metodę elementarnego połączenia Mc Quitty'ego.

Wyodrębniono pięć grup krajów różniących się sytuacją zdrowotną. Do typu A zaliczono Estonię i Łotwę. Typ B obejmuje Węgry, Słowenię i Chorwację. Do typu C należą cztery kraje: Litwa, Polska, Czechy oraz Słowacja. Liczny jest typ D, do którego zaliczono Rumunię, Bułgarię, Macedonię, Serbię i Czarnogórę, Albanie. W typie E znalazły się: Białoruś, Ukraina i Mołdawia. Najgorszą sytuacją zdrowotną społeczeństwa charakteryzują się państwa zaliczone do typu D. Najlepszą kraje należące do typów A i C. Natomiast pośrednią państwa zakwalifikowane do typów B i E. Przy czym znalazły się one w pośrednich typach z różnych przyczyn. O ile w odniesieniu do Łotwy

i Estonii za przyczynę upatruje się tu średnią sytuację ekonomiczną oraz występowanie w tych państwach negatywnych trendów zdrowotnych, notowanych we wszystkich państwach byłego ZSRR (choć w innych krajach występujących z dużo większą siłą, chodzi tu przede wszystkim o STD i STI oraz wysoką umieralność niemowląt). O tle w przypadku państw zaliczonych do typu D – pośrednia sytuacja zdrowotna wynika z połączenia słabej sytuacji ekonomicznej (która raczej warunkowałaby złą sytuację zdrowotną), lecz wpływy kulturowe (przede wszystkim zdrowsze zwyczaje kulinarne) powodują, że sytuacja zdrowotna jest lepsza, niżby należałoby się spodziewać (szczególnie wyraźnie to widać w odniesieniu do umieralności na nowotwory).

Widać wyraźną zgodność podziału dokonanej przez Unię Europejską z podziałem sytuacji zdrowotnej. Kraje należące do typu A i C w całości będą nowymi członkami Unii Europejskiej. Natomiast w spośród państw zaliczonych do typu B jedynie Chorwacja nie zostanie w najbliższym czasie członkiem Unii Europejskiej. Lecz w tym przypadku przyczyną tego faktu jest nie tyle sytuacji społeczna czy gospodarcza, lecz uwarunkowania polityczne (niedawna wojna oraz nacjonalistyczna polityka byłego prezydenta).

PART II

EASTERN BORDER OF EUROPEAN UNION

PART II

EASTERN BORDER OF EUROPEAN UNION

EASTERN BOUNDARY OF LATIN CIVILISATION IN EUROPE

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The subject matter related to the enlargement of the European Union and to the shift of its eastern border constitutes a multi-aspect problem domain. Scholars dealing with this domain pay attention mainly to the economic and social consequences. The issue of the extent, to which the new eastern boundary of the enlarged European Union refers to the civilisational divides, crossing the European continent, is much less taken up. It is known, at the same time, that the different reaches of the various civilisation and culture related circles, associated primarily with the religious roots of the population, exert an essential influence on the mutual relations between the states and the nations. That is why consideration of this problem domain has an importance of not just cognitive, but also political character.

The problems associated with the origins of emergence of particular civilisations in the historical and geographical perspective have come to constitute a very popular theme in the scientific literature as well as in journalism. The reason for this interest lies in the work of Samuel P. Huntington¹. The book was a famous best selling item on the market. It was translated to numerous languages and stirred up a stormy scientific debate. Conform to the popular opinion it explains not only many historical events, but also the course to date of the political transformations in the world. Further, it was commonly admitted that it could constitute the basis for the construction of the geopolitical projections into the future. The initial views on the infallibility and universality of the Huntington's work led thereafter to the undermining of its scientific value and to the sharp criticisms. The intellectual ferment thus formed turned out to be very creative, since numerous very valuable elaborates resulted from it, dealing with the respective issues in historical philosophy, geography, political science and sociology.

¹ S.P. Huntington, *The Clash of Civilisations and the Remaking of the World Order*, Simon & Schuster, 1997.

S. P. Huntington was not, as it is often maintained in popular presentations, the pioneer of knowledge of the character and distribution of various civilisations, and their influence on the fate of world's population. It was a Polish historian, Feliks Koneczny², who was beyond doubt the founder of the consistent concept of the supreme role, played by the civilisation factor in the development and transformations of the societies and states. In his book, first published in 1935, he presented in a comprehensive and synthetic manner the question of variety and multiplicity of civilisations and cultures of the world's population, and tried to determine the scale of their influence on the course of historical and political events.

S. P. Huntington considers in his book individual large civilisations of the world in the spatial perspective. In particular, he determines the boundary between the Latin and Byzantine civilisations in Europe. Let us follow here the reasoning of the author cited: *The fullest and the most convincing answer is provided by the great historical divide, separating for centuries the faithful of the western Christianity from the Muslim and Orthodox peoples. It dates back to the time of division of the Roman Empire in the 10th century. Its course has not much changed for at least past five centuries. In the North it follows the current border between Finland and Russia, then the boundaries of the Baltic states with Russia, crosses western Belarus' and divides Ukraine into the Uniate (Greek-Catholic) West and the Orthodox East, and then crosses Romania, where it separates Transylvania, with the Catholic Hungarian population, from the rest of the country. In former Yugoslavia it goes along the boundaries between Slovenia and Croatia, and the remaining republics. Within the Balkans it coincides, of course, with the historical boundary between the Austria-Hungary and the Ottoman Empire. It is the cultural border of Europe, and in global terms, after the termination of the Cold War, it constitutes the political and economic frontier of Europe and the West* (S. P. Huntington, 1997, pp.232-233 of the Polish translation).

The description here quoted was illustrated by the attached map, entitled "Eastern boundary of Western civilisation", on which the line dividing western Christianity from the Orthodox Christianity and Islam was depicted. Conform to the information provided, the map represented the state as of the year 1500. Both the map shown and the reasoning accompanying it require a critical reaction, since they give rise to substantial opposition. The text referred to states that the divide has not much shifted for at least last five hundred years. Yet, contrary to this statement of S. P. Huntington, the boundary was not stable. Thus, five hundred years ago, at around the year 1500, it was much more to the West than shown on the map. The Orthodox Church reached Rzeszów, Zamość

² F. Koneczny, *O wielości cywilizacji* (On the multiplicity of civilisations; in Polish), Warszawa 2002.

and Białystok. After the Union of Brest' (1596) and the establishment of the Uniate (Greek-Catholic) Church, during the consecutive two centuries, the area up to the river Dneper in the East was organisationally subordinated to Vatican, and the fact that it politically belonged to the Polish-Lithuanian Commonwealth had an enormous impact on the cultural image of this area. After the downfall of the Commonwealth, during the entire 19th century, the situation was undergoing gradual evolution. The liquidation of the Uniate Church and the tsarist struggle against the Polish cultural influence formed the field of confrontation between the Western European and Eastern European culture. Yet, the Orthodox re-conquest was an historical fact, associated with the gradual recession of the influence of Polish culture and Catholicism towards the West. The subsequent, 20th century brought also a significant political instability, which resulted in the significant cultural and civilisational consequences. In the inter-war period (1920-1939) the Polish-Soviet boundary, determined in the Treaty of Riga, divided the areas of a clearly different cultural character. It can be said that it was ultimately the year 1945 that constituted the decisive historical dividing point, having introduced the eventual separation, existing until today. Similarly, in the south-eastern Europe the boundaries between Catholicism, Orthodoxy and Islam have undergone during the last five centuries essential shifts. The expansion of Islam had clear historical phases, while the ethnic frontiers within the Romanian-Hungarian borderland have also been deeply transformed owing to the colonisation and wars.

The map, sketched by S. P. Huntington, does not correspond, either, to the current division of civilisations. It is overly simplified. This is especially visible in its central part, where the boundary is constituted by a straight line, crossing along a meridian Ukraine and Belarus'. It requires a verification and a more precise definition, based on the clearly defined criteria (see Map no. 1).

It appears that these objectives will be best served by the method of historical-political analysis. Consideration of the ethnic and cultural image of the populations inhabiting the regions constituting the borderlands between, on the one hand, Catholicism and Protestantism, and the Orthodox Church on the other, will constitute the fundamental prerequisite allowing for the relatively precise definition of the boundary dividing Europe into the one living within the sphere of the western values, and the one referring to the so-called heritage of the East. It is known that this line passes roughly between the Barents Sea and the Adriatic. Yet, its more precise course gives rise to numerous controversies. This great cultural divide, although most important, is not the only one. We can namely mention here the boundary separating the Eastern Slavonic populations of Orthodox religion from other Orthodox peoples, but speaking a Romance language. The language boundary on the Dnester river is not too distinct, since it crosses the ethnically mixed areas, yet it separates the peoples not only using a different alphabet, but also referring to a different historical past. The

great divide mentioned, stretching from the Lappland to the Dalmatian coast, separating the Western Christianity from the Eastern one, has some four thousand kilometres. It starts in the North at the Norwegian-Russian border and then follows the political boundary separating the Protestant Finland from Karelia, belonging to the Russian Federation. The areas situated to the East of this border, which was established ultimately in 1945, are now inhabited mostly by the Russians. The ancient inhabitants of these territories, like the Karelians, were gradually adopting Orthodox Christianity and undergoing Russification. Their number is nowadays quite small and they live in dispersion. That is why the Finnish-Russian border is at the same time a political, ethnic and economic barrier. The region of Vyborg, which is on the western side of the divide on the map of S. P. Huntington, is currently, after the area had been incorporated into the Soviet Union in 1945, and the Finnish population, both Protestant and Orthodox, had been removed from this territory, took on a purely Russian character. It differs only slightly ethnically and culturally from the remaining Russian territories, located around St. Petersburg. The boundary, separating Orthodox Christianity from Protestantism, reaches the Bay of Finland to the West of Vyborg.

The subsequent segment of the divide is relatively easily determined. It can be assumed, with a certain simplification, that it separates Estonia and Latvia, on the one hand, from the Russian Federation on the other. On the western side we have the traditionally Protestant countries, associated with the Latin culture, while the eastern side is inhabited virtually uniquely by the Orthodox Russian population. Since both Estonia and Latvia belonged for a long time to the Russian, and thereafter to the Soviet Empire, essential demographic and national changes took place on the territories of these two countries. In both of them, having become sovereign since a dozen years, a significant Russian minority lives, actually dominating in some of the border-adjacent areas (like in the region of Narva). We should also mention that the south-eastern part of Latvia, the so-called Latgale (Latgale), has an exceptionally inhomogeneous denominational and ethnic structure. It is a peripheral area, within which five ethnic domains interact, namely the Latvian, Polish, Lithuanian, Belarusian and Russian. This province (the historical territory of the Polish Inflants) is inhabited by the Catholic Latvians, Poles and Lithuanians. Catholics dominate slightly, but the province is inhabited also by numerous Protestant Latvians, as well as by the Orthodox Russians and Belarusians. It can be expected that the fact that Latgale belongs now to Latvia will result in a stronger integration of this borderland region with the Latvian core territory. After the disintegration of the Soviet Union and the appearance of independent Estonia and Latvia, conditions arose for the Estonian-Russian and Latvian-Russian borders to take on a more permanent character and to assume a bigger significance, not only po-

litical and economic, but also ethnic and cultural, dividing western and eastern parts of Europe.

Fig. 1. Eastern boundary of the western civilisation



The entire Catholic Lithuania belongs integrally to the western European culture. The situation is more ambiguous and complex within the territory

of western Belarus'. The Belarusian areas, adjacent to Lithuania, constitute an integral part of the historical region of Vilna. The area is dominated by the Catholic population, admitting Polish nationality. Despite the fact that they speak in everyday life the dialects of the Belarusian language, or have undergone in the Soviet period the language-wise Russification, they are traditionally emotionally attached to Polish culture, and in terms of religion – to the Latin Christianity. No distinct boundary between Orthodoxy and Catholicism exists on this area. The actually observed wide transitory Catholic-Orthodox belt has always been under the influence exerted by both the western and eastern cultures. A similar situation exists in the northern part of the Polish-Belarusian borderland, in the Grodna-Wołkowysk region. In spite of the slight domination of the Catholicism, Orthodox Christianity plays an important role here, as well. More to the South, in the vicinity of the Białowieża Forest, and in the entire Polesie, the Belarusian population of Orthodox denomination dominates in a decisive manner.

World War II brought significant ethnic changes on the area of historical East Prussia. Until 1945 this province belonged to Germany. It was mainly inhabited by the Germans, with Poles and Lithuanians constituting ethnic minorities. The population inhabiting this region was Protestant, except for the Catholic Warmia and partly the Peri-Vistulian region. There was no doubt, then, that this entire territory made a part of the western European civilisation. After the World War II, East Prussia was divided into the northern part, incorporated into the USSR, and the southern part, which became a part of Poland. Polish population of Catholic religion flowed into the southern part, while the Russian population of Orthodox roots, subject to intensive atheist indoctrination, moved into the northern part of East Prussia. Consequently, the former area of East Prussia took on a dual character. The southern part has not in broader terms changed its image and still belongs with respect to civilisation to the western, Latin Christianity. On the other hand, the northern part (the district of Kalininograd) belongs not only politically, but also in terms of civilisation, to eastern European culture. Thus, a distinct enclave emerged, differing by the denominational as well as custom and cultural specificity from the surrounding areas, inhabited by the Roman Catholic populations (Polish and Lithuanian). Nowadays, this small area should be considered as belonging to the Eastern Slavonic Christian Orthodox civilisation.

Ukraine, similarly as Belarus', has been over centuries the object of military rivalry between Catholic Poland and Orthodox Russia. The Ukrainian lands became after the Union of Lublin (1569) an integral part of the Polish Crown. This brought essential civilisation and culture related, as well as ethnic, consequences. The transformations, which, anyway, had started yet before, found their full expression in the Union of Brest' (1596), which established the Greek-Catholic Church. After the eastern lands of the Polish-Lithuanian Com-

monwealth had gone under the Russian occupation, the tsarist authorities liquidated this church. It preserved its influence and significance only in the Austrian Galicia. Ultimately, a distinct religious boundary between the Orthodox Volhynia and Greek-Catholic Galicia took shape. Simultaneously, a clear divide took shape of the North-South orientation, between the Roman Catholic Lublin region and the Orthodox Volhynia. This is the prerequisite for drawing the boundary between Catholicism and Orthodoxy. It goes from the town of Drohiczyn along the river Bug up to the town of Hrubieszów. Then, it departs from the contemporary Polish-Ukrainian border and reaches the river Zbrucz along the boundary, which separated in the 19th century the Habsburg and the Romanov Empires.

Quite complex ethnic and cultural situation exists in Transcarpathian Ukraine (until the World War II called Subcarpathian Ruthenia). Ukrainians, who live there (called until not so long ago Ruthenians) are mainly Greek Catholics. This province belonged for close to 1000 years to Hungary (until 1918), then, in the inter-war period, it was a part of Czechoslovakia, and only in 1945 was incorporated in the Ukrainian Soviet Socialist Republic. This area has been for centuries subject to Hungarian influence, and the southern, lowland part is until today inhabited by the Hungarians. The Greek Catholic Ruthenian population preserved the traditional Byzantine liturgy. They belonged to the Greek Catholic diocese in Uzhorod, which was subordinated – with preservation of organisational autonomy – directly to Vatican. A very important event was constituted by the liquidation of the Greek Catholic Church on these areas by the Soviet authorities after the World War II. Following the downfall of the communism and the restoration of the religious freedom the reconstruction of the Greek Catholic Church took place. The history of the last millennium, as well as the current situation, motivate to place the transcarpathian district of Ukraine – similarly as eastern Galicia – on the western side of the divide, crossing Europe from North to South.

More even to the East than Transcarpathian Ukraine there is the region of Bukovina, having gone through quite a complex political history. In the 19th century it was entirely a Crown Land of the Austrian Empire. In between the world wars it belonged to the Kingdom of Romania. It was divided up in 1940, and this division, into two parts, was confirmed after the World War II. The northern part of the province, in which Ukrainians dominated, was incorporated in the USSR and made a part of the Ukrainian SSR. The southern part, in which Romanians dominated, remained within Romania.

The entire territory of Bukovina was traditionally mainly populated by the faithful of the Orthodox Church. This peripheral region was, however, inhabited by the representatives of numerous central European nations: Ukrainians, Romanians, Jews, Germans, Poles. There was a well-known university in the capital of the province, Czerniowce (until World War I – German-speaking,

in the inter-war period – Romanian, and after the town was incorporated in the USSR – Ukrainian and Russian were the languages of teaching). All this indicates that Bukovina was always situated at the touching point of diverse cultural influences. An important role was played by the metropolitan seat of the independent (“auto-cephalic”) Orthodox Church, established in Czerniowce in 1875. It had a high cultural significance, and tried to refer to the Byzantine tradition. The province as a whole constitutes an integral part of the eastern, Orthodox Europe.

The Hungarian-Romanian ethnic borderland is very vast. This is associated with the history of Transylvania, which belonged until the conference in Trianon (1920) to Hungary. The province was inhabited by Hungarians, Romanians and Germans. Incorporation in Romania after the conference in Trianon, and then after the World War II, significantly weakened the position of local Hungarians, who preserved their ethnic area only in the eastern part of Transylvania. Thus, an enclave of western Christianity appeared, located in the very heart of Romania, separated from Hungary by the area inhabited by the Orthodox Romanians. This enclave is gradually shrinking. In the recent years this is mainly due to the emigration of the Transylvanian Germans to Germany. The Hungarian Szekely’s preserve their identity and do not undergo Romanisation. It can therefore be assumed that the boundary between the Latin and Byzantine Christianity runs approximately along the current Hungarian-Romanian boundary, with the enclave inhabited by the Hungarian Szekely’s classified as belonging to the western side. Similarly, the areas located in the north-eastern Romania, close to the border with Hungary and Ukraine, preserved an important Hungarian minority. An analogous ethnic situation exists in Banat – the province situated in the south-western Romania. After the World War I distinct Romanisation processes have been observed there. Despite this, the region cannot simply be classified as belonging to the Orthodox Byzantine culture. The northern province of the present-day Yugoslavia (Serbia), that is – Voivodina – had been until World War I politically and ethnically Hungarian. Currently, Serbs dominate, but in the North of the province the Catholic Hungarian population still dominates.

To the South of the contemporary Hungary and Romania the areas inhabited by the Southern Slavonic peoples are situated. These areas have been over the centuries crossed by the boundary separating the spheres of influence of Rome and Byzance. On the western side of the great divide the Catholic nations of Croats and Slovenians took shape. On the eastern side – three Orthodox Slavonic nations: Serbian, Bulgarian, and, relatively recently, Macedonian. This development was largely due to the cultural and political conditions. The ethnic setting was additionally complicated by the long period of subordination to the Ottoman Empire, which has left a significant number of Muslims. They concentrate mainly in Bosnia and Herzegovina, around Sarajevo, as well as around

Bihać and Cazin. The Dalmatian Coast, stretching along the Adriatic, is inhabited by the Croats. The cruel war between the Serbs, Croats and Muslims ended with the establishment of a small, but ethnically homogeneous state of the Bosnian Muslims, inimical towards the Catholic Croats and the Orthodox Serbs.

Owing to the long period of Turkish domination large territories took shape in the south-eastern Europe – besides Bosnia and Herzegovina – of definitely Muslim character. Thus, the majority of Albanians (except for the few Catholics in the region of Shkodra in northern Albania, and the Orthodox population at the border with the Greek Epirus) are the followers of Islam. Likewise, almost entire Yugoslav province of Kosovo is inhabited by the Muslim Albanians. The representatives of this nationality inhabit, as well, the western part of Macedonia. Hence, a large region took shape on the Balkan Peninsula, inhabited by the faithful of Islam of Albanian nationality, who differ culturally and in terms of civilisation from their Christian neighbours. These, however, are not the sole Muslim areas in Europe. After the World War I Turkey preserved a part of its territory to the North of Dardanelles and Bosphorus. This area is virtually exclusively inhabited by the Muslim Turks. An important Turkish minority remained in Bulgaria (in the Rodope mountains and in the north-eastern Bulgaria). Except for the Turkish-speaking Muslims, Bulgaria is also the homeland for the Bulgarian-speaking Muslims, the so-called Pomaks. Yet, both these groups amount to just 10% of the population of Bulgaria, and thus cannot change the overall cultural character of the Orthodox Bulgaria.

The considerations here presented indicate that the entire territory to the South of the Carpathian Mts. is extremely diversified in ethnic, language and denominational terms. Difficult delimitation problems face any scholar endeavouring tracing of the great divide, in view of the existence of multi-cultural areas, which cannot be unequivocally classified as belonging to the East or to the West. That is why it is hard to carry out a precise delimitation procedure. Yet, all this does not change the basic fact of existence of the North-South divide, crossing the central-eastern Europe.

The analysis of the ethnic settings within the territory of central-eastern Europe demonstrated that the boundary between the Eastern and Western Christianity is in principle not simply linear. There exists in many places a broad intermediate zone, within which the western and eastern civilisations exerted their influences. In the course of history these zones moved from the West to the East, or vice versa. We can show nowadays only few segments, on which this boundary is sharply defined. In this context we can mention the Finnish-Russian border, the Polish-Ukrainian border on the river Bug, and the difference between Galicia and Volhynia. Along the remaining parts of the divide here considered, splitting Europe, there exist entire regions, which belong simultaneously to the West and the East (like western Belarus', Voivodina, or Banat). Simultaneously, owing to the changes of the political boundaries, two

enclaves, separated from their cultural motherlands, took shape. The first of them, belonging to Russia, is the district of Kaliningrad (German Königsberg, Polish Królewiec). There is also a large region in the centre of Romania, inhabited in its vast majority by the Hungarian population. When speaking of such islands we should not omit, neither, the culturally distinguishing areas inhabited by the faithful of Islam on the Balkan Peninsula (see Map no. 2).

Fig. 2. Boundary between the Latin and the Byzantine civilisations in Europe



The proposition of the threat of conflicts between the civilisations, or between the varieties of different civilisations, which would impact in a decisive

manner on the future fate of the globe is very much pronounced in the book of Samuel P. Huntington. This leads to the need of recognising the potential for emergence of the crisis situations in Europe, brought about by the oppositions resulting from the differences of cultures or religions. It can be supposed that in the era of intensifying processes of the universal, lay, globalising, and consumption-oriented nature, any kind of conflict between the various Christian denominations in Europe seems to be less and less probable. The thus strongly formulated proposition, though, can be questioned. Not so long ago we have witnessed the fratricidal fighting between the Catholic Croats and the Orthodox Serbs. The antagonism between these two nations is still very strong. In spite of this, however, a new war in Bosnia and Herzegovina is little probable. Such a conclusion can be drawn, in particular, from the fact that the poly-ethnic areas, having been the sources of conflict, were liquidated. On the other areas of the Catholic-Orthodox interaction the situation is normalised and should not give rise to apprehensions. Similarly, the conflicts between the Catholics and the Protestants go into oblivion. The North Irish conflict is an exceptional, local case, which does not bear an influence on the general shape of relations between the Protestantism and Catholicism. It can therefore be expected that the custom and culture differences existing between the Catholics, Protestants and Orthodox Christians will become increasingly fuzzy in the integrating Europe.

An important community of the faithful of Islam exists on the Balkan Peninsula, otherwise dominated by the Orthodox Church. This particular community is constituted by the Albanians, Bosnians and Turks. The relations between them and the Orthodox Serbs, Macedonians, and – albeit to a somewhat lesser degree – Bulgarians, have the character of a historical confrontation. The total number of Muslims in this region comes close to 10 million. Most of them are Albanians (around 6 million). Albanian population demonstrates a very high demographic dynamics, coupled with territorial expansion. Albanians are gradually pushing back the Serbs and the Macedonians. The ethnically Albanian territories are expanding. An illustration of this process is brought by the case of Kosovo, which became Albanian and Muslim. An important part of western Macedonia has also come under the domination of the Albanians. The consequences are not just of purely geographical nature. The evolution of the ideological attitudes drives towards the confrontation and to the struggle for dominance. The causes of this struggle lie not only in the religious and cultural differences, but also in the political ones. Yet, the slogans referring to the religious unity are better carriers, and are more easily comprehended, and so are commonly made use of. A definite cause-and-effect mechanism emerges, having as its roots the differences between the ethnic groups belonging to the different cultural and civilisational quality circles. It is in this sense that the forecasts of S. P. Huntington, speaking of the approaching conflicts between the nations belonging to different civilisations, may become true.

In connection with the above conclusion the conduct of a comparative analysis between the civilisational and cultural divisions of Europe and the geographical setting of the future European Union appears to be a well justified task. It namely turns out that the future eastern boundaries of the extended European Union do to a large extent coincide with the denominational divide of the European nations. The eastern reach of the European Union, which in quite a near future will be equivalent to the eastern boundaries of Finland, Estonia, Latvia, Lithuania, Poland, and Hungary, is very much an approximation of the boundary separating the nations associated with the historical heritage of Rome and Byzance. This will bring essential political consequences. Such a boundary, namely, will have not just an economic and social dimension, but also the one referring to civilisations and cultures.

Streszczenie

WSCHODNIA GRANICA CYWILIZACJI ŁACIŃSKIEJ W EUROPIE

Punktem wyjścia do analizy jest odwołanie do znanej książki S. P. Huntingtona, w której autor przewiduje, że w przyszłości nastąpi konfrontacja między głównymi cywilizacjami na świecie. Antagonizmy te są zdeterminowane przede wszystkim przynależnością do odmiennych konfesji religijnych.

W następnej zasadniczej części artykułu przedstawiono zaproponowane przez S. P. Huntingtona rozgraniczenie dzielące Europę na dwie części. Granica ta przebiega od Morza Barentsa do Adriatyku. Po zachodniej stronie tej granicy usytuowane są narody katolickie i protestanckie, nawiązujące do zachodniej spuścizny rodowodu łacińskiego, zaś po wschodniej narody prawosławne, związane tradycyjnie z Bizancjum. Stwierdzono jednoznacznie, że wydzielona przez S. P. Huntingtona granica jest uproszczona i wymaga dokładnej weryfikacji merytorycznej. Została ona przez autora zrealizowana. Analiza układów etnicznych na obszarze Europy Środkowo-Wschodniej ujawniła, że granica między chrześcijaństwem wschodnim a zachodnim nie ma w zasadzie charakteru linearnego. Istnieje na wielu obszarach szeroka strefa pośrednia, na której oddziaływały wpływy kulturowe cywilizacji łacińskiej i bizantyńskiej. Dodatkowo, w rezultacie zmian granic politycznych uformowały się duże enklawy oderwane od swoich macierzystych obszarów kulturowych. Jest to obwód kaliningradzki oraz wschodni Siedmiogród. Autor zwraca również uwagę na ukształtowanie się na Półwyspie Bałkańskim obszarów zamieszkałych przez wyznawców islamu.

W zakończeniu tego swego artykułu autor zastanawia się, czy istnieje możliwość konfrontacji między różnymi konfesjami w Europie. Zakłada, że istnieje pewne niebezpieczeństwo trwania konfliktów etnicznych na Półwyspie Bałkańskim.

EASTERN BORDER OF EUROPEAN UNION – OPPORTUNITIES AND THREATS

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In this paper, due to the imposed size, an attempt has been made to characterise synthetically specific features of the eastern border of Poland, which in a close perspective will become the external border of the European Union. Although the discussed problems have a rich subject literature, yet so far the research attention has concentrated on the multi-aspect analysis of transborder infrastructure, personal border traffic, and transborder traffic of transport means¹. Whereas in the subject literature only sporadically some attempts have been made to research transborder criminality, readmission of foreigners and infrastructure assuring protection of the state border (the network of watch points and border checkpoints of the Border Guard)².

¹ The following publications may be mentioned here:

1. Komornicki T.: *Granice Polski. Analiza zmian przenikalności w latach 1990-1996* [Borders of Poland. An Analysis of Changes to Permeability in the Years 1990-1996]. „Geopolitical Studies”. Warszawa 1999, vol. 5;
2. Pastuszak Z.: *Przejścia graniczne i ruch graniczny w obszarze Euroregionu Bug* [Border Crossings and Border Traffic within the Euroregion Bug], „Euroregion Bug”, vol. 7, Norbertinum, Lublin 1997;
3. Kitowski J.: *Polish Eastern Border in Perspective of European Integration Processes – Obstacles and Dangers* [in:] Eastern Borders of European Integration Processes (ed. J. Kitowski). “Papers and Monographs of the Department of Economy No. 19.” Rzeszów 2000, pp. 107-144.
4. Kitowski J.: *Czas oczekiwania na odprawę pojazdów samochodowych na drogowych przejściach granicznych w drugiej połowie 1999 roku* [Waiting Time for Clearance of Car Vehicles at Road Border Crossings in the Second Half of 1999], [in:] „Prace Komisji Geografii Komunikacji PTG”. Warszawa-Rzeszów 2000, vol. VI, pp. 27-52.

² Cf.: J.Kitowski: *Nielegalna migracja transgraniczna w południowo-wschodniej Polsce* [Illegal Transborder Migration in South-Eastern Poland [in:] Problemy regionalnej współpracy transgranicznej [Problems of Regional Transborder Co-operation] (ed. J. Kitowski). Rzeszów 1996, pp. 179-197; J.Kitowski, H.Czajkowski: *Przestępczość transgraniczna w Polsce – uwarunkowania, tendencje i społeczne skutki* [Transborder Criminality in Poland – Conditions, Tendencies and Social Effects [in:] Społeczne

Table 1. Infrastructure of Border Guard

Unit of Border Guard	Length of section in km	Number of border checkpoints			Number of watch points		
		As of			As of		
		31.12.2001	31.12.2002	2.01.2003	31.12.2001	31.12.2002	2.01.2003
Warmińsko – Mazurski	198.6969	4	4	4	11	10	7
Podlaski	342.2607	6	6	6	15	16	11
Nadbużański	457.6402	5	5	5	15	14	10
Bieszczadzki	370.1900	5	5	5	17	18	15
Karpacki	399.1876	9	9	9	18	17	10
Śląski	352.2700	8	9	9	16	17	7
Sudecki	230.6700	6	5	5	14	11	5
Luzycycki	280.7971	7	6	6	16	14	9
Lubuski	194.7750	7	6	6	14	12	5
Pomorski	168.3536	8	8	7	11	7	2
Maritime	454.5393	6	6	6	9	8	3
Checkpoint Okęcie		1	1	1			
Extramural Dept. of Head Command of BG		2 dept.	3 dept.	3 dept.			
TOTAL	3 449.3804	72	70	71	156	144	84

Source: Data of the Border Guard. Own work.

The eastern border of Poland, as the future external border of the European Union, is protected by the following units of the Border Guard: Warmińsko-Mazurski (on the section of 199 km – the border with Russia), Podlaski (342 km – the border with Lithuania and with Belarus), Nadbużański (458 km – the border with Belarus and with Ukraine), and Bieszczadzki (236 km – the border with Ukraine³). As of the beginning of 2003 r. (Table 1) the discussed border section had the following infrastructure:

- a) The Warmińsko-Mazurski Unit of the Border Guard - 7 watch points: Lelkowo, Górowo Iławieckie (since 2 Jan. 2003 it has taken over competence and personnel of the watch point of Świadki Iławieckie), Sępólno, Barciany, Węgorzewo, Banie Mazurskie and Dubeninki, and 4 border checkpoints: Elbląg, Braniewo (since 2 Jan. 2003 it has taken over competence and personnel of the watch point of Braniewo), Bezledy (since 2 Jan. 2003 it has taken over competence and personnel of the watch point of Bartoszyce) and Goł-

koszty migracji transgranicznych [Social Costs of Transborder Migrations] (ed. J. Kitowski). Rzeszów 1997, pp. 85-119.

³ „Straż Graniczna” [“Border Guard”] 1998, No 8, p. 19 and J.Kitowski: *Nielegalna migracja transgraniczna w Polsce w latach 1990-1996* [Illegal Transborder Migration in Poland in the Years 1990-1996] [in:] *Komunikacja a otoczenie* [Communication and Environment] (ed. S. Dziadek). „Studia Ekonomiczne”. Wyd. Akademii Ekonomicznej im. K. Adamieckiego, Katowice 1999, vol. 7, pp. 59-72.

- dap (since 2 Jan. 2003 it has taken over competence and personnel of the watch point of Gołdap),
- b) The Podlaski Unit of the Border Guard - 10 watch points: Wizajny, Rutka Tartak, Puńsk, Płaska, Lipsk, Nowy Dwór, Krynki, Białowieża, Dubicze Cerkiewne and Mielnik, and 6 border checkpoints: Budzisko (since 2 Jan. 2003 it has taken over competence and personnel of the watch point of Szypliszki), Ogrodniki (since 2 Jan. 2003 it has taken over competence and personnel of the watch point of Sejny), Kuźnica Białostocka (since 2 Jan. 2003 it has taken over competence and personnel of the watch point of Sokółka), Bobrowniki (since 2 Jan. 2003 it has taken over competence and personnel of the watch point of Gródek), Siemianówka (since 2 Jan. 2003 it has taken over competence and personnel of the watch point of Narewka) and Czeremcha (since 2 Jan. 2003 it has taken over competence and personnel of the watch point of Czeremcha),
- c) The Nadbużański Unit of the Border Guard - 13 watch points: Janów Podlaski, Kodeń, Dołhobrody, Sławatycze, Włodawa, Zbereże, Dorohusk, Skryhiczyn, Horodło, Hrubieszów, Kryłów, Łaszczów and Lubycza Królewska, and 5 border checkpoints: Terespol (since 14 Oct. 2002 it has taken over competence and personnel of the watch point of Terespol), Sławatycze, Dorohusk, Hrebenne and Hrubieszów,
- d) The Bieszczadzki Unit of the Border Guard - 11 watch points: Horyniec, Lubaczów, Korczowa, Kalników, Hermanowice, Huwniki, Wojtkowa, Ustrzyki Dolne, Lutowiska, Ustrzyki Górne and Stuposiany, and 3 border checkpoints: Korczowa, Medyka (since 14 Oct. 2002 it has taken over competence and personnel of the watch point of Medyka) and Krościenko.

In 2002 the borders of Poland were crossed by almost 191.5 million people, including 83.7% based on their passports, 15% within the small border traffic, and 1.3% within the simplified traffic and as service people of transport means. The personal border traffic fell down by 16.2% in relation to the previous year, whereas this fall was over twice lower at the eastern border and it amounted to 7.1% (including the almost 15% fall at the border with Belarus). The share of the eastern border in the personal border traffic was 15.3% in total, including 17.9% in the passport traffic (no small border traffic), and in the so-called simplified traffic –11.6%. The Border Guard refused the entry right into the territory of Poland to 51,814 persons (a fall by 5.4% in relation to the previous year), including as many as 78.6% at the eastern border. In the discussed group of states the greatest share had the section of border with Belarus – 43.0% and with Ukraine – 35.5%. In relation to the previous year the number of refusals of entry into the territory of Poland fell by 1.1% at the eastern border, including by over 20% at the border with Lithuania and by almost 20% at the border with Ukraine. The number of entry refusals increased, however, at the border with Russia – as many as by 54.1% and with Belarus – by 2.6%.

Table 2. The arrested by the Border Guard itself for crossing the state border in breach of the regulations.

Specification	Years		Structure in %	Growth rate in %
	2001	2002		
IN TOTAL	6 185	5 372	100.00	- 13.14
▪ citizens of Poland	2 532	2 286	42.55	-9.72
▪ foreigners	3 653	3 086	57.45	-15.52
▪ from Poland	3 330	2 801	52.14	-15.89
▪ to Poland	2 855	2 571	47.86	-9.95
A. Outside border crossings	3 696	3 010	56.03	-18.56
▪ from Poland	1 564	1 196	22.26	-23.53
▪ to Poland	2 132	1 814	33.77	-14.92
B. At border crossings	2 489	2 362	43.97	- 5.10
▪ from Poland	1 766	1 605	29.88	-9.12
▪ to Poland	723	757	14.09	4.70

Source: as for table 1.

Table 3. The arrested for crossing of the state border in breach of regulations (cbb) and for attempting to cross the state border in breach of regulations in 2002.

Citizenship of	Total	Border section				
		Eastern	Southern	Western	Maritime	Air
Poland	2 286	61	931	1 098	63	133
Ukraine	573	79	33	399	14	48
The Czech Rep.	502	0	500	2	0	0
Afghanistan	383	153	4	225	0	1
Russia	366	61	55	247	1	2
China	149	53	86	9	0	1
Vietnam	146	62	19	62	0	3
Lithuania	88	23	1	61	2	1
Belarus	43	9	3	26	0	5
TOTAL	5 372	660	1 843	2 562	96	211
Including citizens of countries bordering Poland in the east	1 070	172	92	733	17	56

Source: as for table 1.

The share of the eastern border (in the traffic of transport means) reached 17.4% in 2002, including buses – 33.2%, trucks - 25.1%, and passenger cars – 16.2%. At the eastern border, however, the greatest intensity of passenger car traffic fell to the border section with Ukraine – 37.7%, of buses – also to the same section – 39.7%; whereas the greatest intensity of trucks fell to the border with Lithuania – 40.9%. We can notice that the eastern border is distinguished

by a lower fall in relation to all sections of Poland's borders, by traffic of transport means – lower by 14.8% and by passenger cars – lower by 14.5%. At the discussed section of the border, however, there was a faster increase in truck traffic by 6.7%, and in buses (an increase by 4.2%, whereas that traffic fell by less than 1% in total). The greatest dynamism at the eastern border characterised the bus traffic at the border with Russia (an increase by 30.2%) and the truck traffic at the border with: Ukraine (by 18%), Lithuania (by 13.1%) and Belarus (by 12.4%). It was also possible to see a fall by over 10% of passenger car traffic at the border with Belarus.

In 2002 the Border Guard stopped for crossing and attempt of crossing of the state border in breach of regulations (Tables 2 and 3) 5,372 persons (a fall by 13%), including 660 persons at the eastern border, constituting 12.3% of the total number of the arrested (a fall by 16.5%). Most of them attempted to cross the border outside crossings - 56% (a fall by almost 1/5). We can see a proceeding process of tightening of the western border against illegal migrants, and it is evidenced by a 23.5% fall of the number of the stopped outside border crossings in the direction of Poland.

The greatest number of persons was stopped at the border section with Ukraine (497), whereas at the remaining sections of the discussed border the number oscillated from 49 (with Russia) to 63 (with Belarus) – cf. Table 4. Interesting conclusions can be formulated based on a careful analysis of the data included in the Table 2, earlier referred to. Among the arrested by the Border Guard as many as 42.5% constituted Poles, out of whom every second one was stopped while attempting to cross illegally the border with Germany. Whereas citizens of the countries bordering Poland in the east constituted almost 20% of the total number of the stopped (out of whom only 16.1% at the border with Poland). Over 2/3 of the discussed group (68.5%) were stopped at the border with Germany, including 399 citizens of Ukraine, 247 – of Russia, 61 – of Lithuania and 26 citizens of Belarus (Table 3). We can notice that at the Polish eastern border 58.4% of the total number of the arrested due to the discussed reason were citizens of India, 42.5% - citizens of Vietnam, 40% - of Afghanistan, 35.6% - of China, and 26.1% - citizens of Lithuania.

The Border Guard stopped for illegal crossing of the border (or its attempt) outside the crossings 3,010 persons, out of whom on the average every fourth one was Polish, and every third one was attempting to cross illegally the border with Germany. We can notice that in total citizens of Poland, the Czech Republic and Slovakia amounted to 45% of the discussed group of migrants. Apart from the mentioned, the most frequently stopped were citizens of Afghanistan (380 persons), of Russia (300), of Ukraine (157), of China (142), of Vietnam (130) and of India (112 persons). Whereas at the border crossings 2,362 persons were stopped, including 2/3 at the border with Germany. In the discus-

sed group of the arrested the dominant were Poles (63.6%) and citizens of Ukraine (416 persons, i.e. 17.6%).

Table 4. The arrested for crossing of the state border in breach of regulations (cbb) and for attempting to cross the state border in breach of regulations in 2002.

a) at the eastern section						
Citizenship	TOTAL	Including at the eastern section	Russia	Lithuania	Belarus	Ukraine
Poland	2 286	61	1	12	30	30
Afghanistan	383	153	7	11	135	135
Belarus	43	9	2	5	2	2
China	149	53	0	0	53	53
The Czech Rep.	502	0	0	0	0	0
India	113	66	0	1	65	65
Lithuania	88	23	23	0	0	0
Russia	366	61	7	6	29	29
Ukraine	573	79	0	3	76	76
Vietnam	146	62	4	4	53	53
Jointly citizens of countries bordering Poland in the east	1 070	172	32	14	107	107
TOTAL	5 372	660	51	63	497	497

b) at the remaining sections						
Citizenship	Slovakia	The Czech Rep.	At the southern section	Germany	Maritime	Air
Poland	292	639	931	1 098	63	133
Afghanistan	0	4	4	225	0	1
Belarus	1	2	3	26	0	5
China	83	3	86	9	0	1
The Czech Rep.	32	468	500	2	0	0
India	0	0	0	47	0	0
Lithuania	0	1	1	61	2	1
Russia	0	55	55	247	1	2
Ukraine	5	28	33	399	14	48
Vietnam	7	12	19	62	0	3
Jointly citizens of countries bordering Poland in the east	6	86	92	733	17	56
TOTAL	536	1 307	1 843	2 562	96	211

Source: as for table 1.

Table 5. Number of the arrested in 2002, based on provisions of the statute on foreigners.

Arrested persons	Number of arrested persons	Reason for arresting			
		Lack of required documents	Work without permit	Commercial activity without permit	Others
Jointly	8 204	3 942	1 321	1 424	1 517
Citizens of countries bordering Poland in the east	3 551	1 058	708	790	995
Share in %	43.3	26.8	53.6	55.5	65.6
Russia	588	479	32	26	51
Lithuania	72	52	6	11	3
Belarus	523	106	53	214	150
Ukraine	2 368	421	617	539	791

Arrested persons	Number of arrested persons	Procedure towards arrested persons				Refused decision about deportation	Decision about deportation
		Motion of deportation	Decision obliging to leave territory of RP	Committed to another agency	Released		
Jointly	8 204	5 811	2 433	204	316	15	5 796
Citizens of countries bordering Poland in the east	3 551	1 714	1 711	84	79	5	1 709
Share in %	43.3	29.5	70.3	41.2	25.0	33.3	29.5
Russia	588	505	82	7	29	0	505
Lithuania	72	48	19	1	4	0	48
Belarus	523	207	278	34	7	0	207
Ukraine	2 368	954	1 332	42	39	5	949

Arrested persons	PROCEDURE AGAINST PERSONS AGAINST WHOM THERE WAS A MOTION OF DEPORTATION				
	Deported	Placed in guarded centre	Detained to be deported	Released	Committed to another agency
Jointly	1 616	632	739	2 735	89
Citizens of countries bordering Poland in the east	562	69	98	979	6
Share in %	34.8	10.9	13.3	35.8	6.7
Russia	44	47	31	377	6
Lithuania	6	4	1	37	0
Belarus	118	4	11	74	0
Ukraine	394	14	55	491	0

Source: as for table 1.

The Border Guard stopped in 2002, based on the regulations of the statute on foreigners⁴, 8,204 persons (Table 5), including 3,551 citizens of the countries

⁴ Statute of 25 June 1997 on foreigners (*Journal of Law* No. 114, item 739 with subsequent amendments).

bordering Poland in the east (43.3%), out of whom the greatest number constituted citizens of Ukraine (2,368 persons, i.e. 28.9% of the total number of the arrested and respectively 66.7% of the number of the arrested citizens of the neighbouring countries).

Table 6. Readmission in the years 2001-2002

Border section	Deported from RP		Admitted by RP					
	Foreigners		In total		Citizens of RP		Foreigners	
	2001	2002	2001	2002	2001	2002	2001	2002
In total	5 954	4 836	7 623	5 281	5 399	3 425	2 224	1 856
Including at the eastern section	3 576	2 824	35	39	29	25	6	14
Russia	46	29	1	0	0	0	1	0
Lithuania	102	110	7	4	6	1	1	3
Belarus	636	536	9	12	8	6	1	6
Ukraine	2 792	2 149	18	23	15	18	3	5

Source: as for table 1.

Citizens of countries bordering Poland from the east constituted over half of the arrested foreigners' number due to commercial activity without permit – 55.5% (including citizens of Ukraine – 37.85%) and work without permit – 53.6% (including citizens of Ukraine – 46.7%). Lack of required document was the reason for arresting 1,058 citizens of the countries bordering Poland in the east (26.8%), including the most numerous group of Russia's citizens (45.3% of the total number of the arrested, due to the discussed reason, inhabitants of the countries bordering Poland from the east).

Almost 2/3 of all the stopped due to other reasons than the mentioned ones so far, constituted in 2002 citizens of the eastern neighbours of Poland. Citizens of the discussed group of states amounted to over 70% of the number of the arrested citizens who were granted a decision obliging them to leave the territory of Poland (1,711 persons, including 1,322 citizens of Ukraine). A decision of deportation from Poland was taken towards 1,709 citizens of the countries bordering Poland from the east (including 949 citizens of Ukraine), constituting 29.5% of the general number of the foreigners who were granted a decision about deportation and 48.1% of the stopped citizens of the countries bordering Poland in the east. In relation to the persons who were covered by a motion of deportation, in fact 562 citizens of our eastern neighbours were deported and they constituted 34.8% of the total number of the deported foreigners. The share of the discussed group of citizens in the total number of foreigners who were covered by a motion of deportation was in the group:

- a) of the released – 35.8% (including 491 citizens of Ukraine and 377 citizens of Russia),
 b) of the detained (to be deported) – 13.3% (including 55 citizens of Ukraine),
 c) of the placed in a guarded centre – 10.9% (including 47 citizens of Russia).

Table 7. Readmission from Germany in 2002.

Citizenship	Jointly	Legal entry to RP					Illegal entry to RP					
		Total	Csbbr with RP			Total	Csbbr with RP			Csbbr to RP		
			At bc	Outside bc	At non-est. pl..		At bc	Outside bc	At non-est. pl..	At bc	Outside bc	At non-est. pl..
IN TOTAL	1 713	684	10	588	86	1 029	3	841	185	3	54	972
Incl. citizens of countries bordering Poland in the east	642	536	10	476	50	106	0	86	20	2	14	90
Russia	423	325	3	281	41	98	0	80	18	1	13	84
Lithuania	4	3	0	3	0	1	0	1	0	0	1	0
Belarus	10	9	0	9	0	1	0	1	0	0	0	1
Ukraine	205	199	7	183	9	6	0	4	2	1	0	5

Source: as for table 1.

Table 8. Directions of foreigners' deportation from Poland in 2002..

Specification	Jointly	Russia	Lithuania	Belarus	Ukraine	at the eastern section	at the southern section	Germany	Maritime	Air
	4 836	29	110	536	2 149	2 824	886	83	4	1 039
Incl. citizens of countries bordering Poland in the east	2 301	26	79	436	1 673	2 214	29	9	0	49
Russia	185	25	7	98	45	175	8	2	0	0
Lithuania	74	1	70	0	0	71	1	1	0	1
Belarus	341	0	0	328	4	332	2	4	0	3
Ukraine	1 701	0	2	10	1 624	1 636	18	2	0	45

Source: as for table 1.

Within readmission (Table 6) 4,836 persons were committed from Poland (a fall by 19%), including 58.4% at the eastern section (one year before the share was 60.1%). The most frequent cases of readmission occurred at the border with Ukraine. In 2002 2,149 persons were committed, constituting 44.4% of the total number of the persons committed from Poland and as many as 76.1% of the number of the committed at the eastern border. At the discussed section of the eastern border we can observe, in the aspect of readmission, a visible asymmetry, as only 35 persons were committed to Poland (including 25 citizens of Poland). It is worth mentioning here that to Poland, within readmission, 699

citizens of Russia, Lithuania, Belarus and Ukraine were committed, including 642 at the border with Germany and 52 at the southern section (including 51 at the border with the Czech Republic). Among the discussed group citizens of Russia (461 persons) and of Ukraine (220 persons) were dominant. Out of the total number (642) of our eastern neighbours committed to Poland from Germany (Table 7), 536 entered Poland legally, out of whom 476 made an illegal attempt to force the Polish-German border (and 50 crossed the border in a non-established place). Whereas out of 106 foreigners (readmitted from Germany), who entered Poland illegally, as many as 98 were holders of Russian passports.

Table 9. Reasons for deportation of foreigners from Poland in 2002.

Citizenship	Total	Reason for deportation				
		Csbbbr	Illegal stay	Illegal work	Lack of financial means	Art.13 of statute on foreigners
N TOTAL	4 836	1 592	1 172	576	118	1 378
Incl. citizens of countries bordering Poland in the east	2 301	160	554	388	105	1 094
Russia	185	34	59	11	5	76
Lithuania	74	23	2	0	1	48
Belarus	341	8	94	73	9	157
Ukraine	1 701	95	399	304	90	813

Source: as for table 1.

In 2002 4,836 foreigners were deported from Poland, out of whom 47.6% constituted citizens of the countries bordering us in the east (Table 8). Among the deported citizens of Ukraine were dominant, and they constituted 35.1% of the total number of the foreigners deported from Poland and respectively 73.9% of the number of our eastern neighbours. We can notice specific differences in the structure of the reasons for deportation from Poland of all foreigners and citizens of the countries bordering Poland in the east. The most frequent reasons for deportation from Poland of foreigners (Table 9) were: crossing of the state border in breach of regulations (32.9%), violation of art. 13 of the statute on foreigners (28.5%), illegal stay (24.2%) and illegal work (11.9%). Whereas our eastern neighbours most frequently had to leave the territory of Poland due to violation of art. 13 of the statute on foreigners (47.5%), illegal stay (24.1%) and illegal work (16.9%). The discussed disproportion caused that the share of citizens of the states – eastern neighbours of Poland was 89% of the total number of the foreigners deported due to lack of financial means, 79.4% of the violating the provisions of art. 13 of the statute on foreigners,

67.4% of the deported due to illegal work, and 47.3% of the deported due to illegal stay.

The deported foreigners most frequently left the territory of Poland across the eastern border (58.4% - cf. Table 8). In that number citizens of Ukraine were dominant, constituting 78.4% of the total number of foreigners forced to leave Poland across the eastern border and 96.2% of the discussed number of citizens from states bordering Poland in the east.

There is a hampering influence on intensification of transborder criminality of refusal procedure, by the Border Guard, forbidding foreigners entry into the territory of Poland (against those who do not meet the required criteria). In 2002 the Border Guard did not allow entry to Poland for almost 52,000 persons (Table 10), constituting an over-5% fall in relation to the previous year. As many as 78.6% of cases of entry refusal fell to the eastern border, including 62% to the section of the border with Belarus and Ukraine (despite the fall of the number, in case of Ukraine by nearly 20%).

Table 10. Refusals of foreigners' entry into Poland in the years 2001 - 2002

Border section	Years		Structure in 2002 in %	Growth rate in %
	2001	2002		
POLAND	54 798	51 814	100.0	- 5.4
including:				
EASTERN	41 182	40 732	78.6	- 1.1
▪ with Russia	5 259	8 103	15.6	54.1
▪ with Lithuania	725	578	1.1	- 20.3
▪ with Belarus	17 049	17 499	33.8	2.6
▪ with Ukraine	18 149	14 552	28.1	-19.8
SOUTHERN	3 471	2 227	4.3	- 35.8
▪ with Slovakia	1 575	781	1.5	- 50.4
▪ with the Czech Rep.	1 896	1 446	2.8	- 23.7
WESTERN	7 532	7 423	14.3	- 1.4

Source: as for table 1.

In 2002 the Border Guard stopped smuggling valued 106 million zł (an increase by 17%), out of which 71.8% fell to the eastern border (Tables 11-14). To the discussed border section fell: 88.1% of the discovered alcohol smuggling, 81.6% of car smuggling (as per their value) and 73.4% of cigarette smuggling. The eastern border was also featured by a higher dynamism, in relation to the state border as the total, of the overall discovered smuggling values – by 8.25%, including smuggling of cigarettes – by 13.33% and of alcohol – by 7.35%. At the eastern border almost 2/3 of the discovered smuggling value fell to the border with Ukraine (37.8%) and Belarus (28.3%). Almost ¾ of the alcohol smuggling value at the eastern border were stopped at the border with Ukraine (an increase by 117.25%). Car smuggling was most often discovered at the border with Belarus (50.8%) and Ukraine (28.1%), whereas cigarette smu-

gging – at the border with Russia (50.3%, meaning an almost three-time increase in value of the discovered smuggling in relation to the previous year). In the discussed period of time we could observe a consistent process of tightening the border with Lithuania, and it found confirmation in a dynamism fall of the discovered smuggling: of alcohol (by 51.6%), of cars (by 3.75%) and of cigarettes (by 2%).

Table 11. Value of smuggling discovered by the Border Guard in the years 2001 – 2002 (in zlotys).

Border section	Years		Structure in 2002 in %	Growth rate in %
	2001	2002		
POLAND	90 597 734	106 024 505	100.00	17.03
Including:				
EASTERN	60 764 031	76 126 280	71.80	25.28
▪ with Russia	7 331 689	19 352 386	18.25	163.96
▪ with Lithuania	6 492 200	6 435 062	6.07	-0.88
▪ with Belarus	24 148 650	21 569 329	20.34	-10.68
▪ with Ukraine	22 791 492	28 769 503	27.13	26.23
SOUTHERN	10 357 034	5 833 127	5.50	-43.7
▪ with Slovakia	2 667 365	1 198 756	1.13	-55.1
▪ with the Czech Rep.	7 689 669	4 634 371	4.37	-39.7
WESTERN	9 515 433	8 647 919	8.16	-9.1
▪ including outside border zone	1 507 788	5 123 970	4.83	239.8

Source: as for table 1.

Table 12. Smuggling of cars discovered by the Border Guard in the years 2001 – 2002

Border section	Years				Structure in 2002 in %	Growth rate in %
	2001		2002			
	Number	Value in zł	Number	Value in zł		
POLAND	1 344	45 889 264	1 280	37 974 210	100.00	-17.25
Including:						
EASTERN	767	36 739 914	821	31 003 300	81.64	-15.61
▪ with Russia	39	989 000	119	1 629 100	4.29	64.72
▪ with Lithuania	96	5 103 050	93	4 911 800	12.93	-3.75
▪ with Belarus	357	19 398 680	353	15 752 200	41.48	-18.80
▪ with Ukraine	275	11 249 184	256	8 710 200	22.94	-22.57
SOUTHERN	246	3 886 200	182	2 468 504	6.50	-36.5
▪ with Slovakia	43	1 305 700	34	707 400	1.86	-45.8
▪ with the Czech Rep.	203	2 580 500	148	1 761 104	4.64	-31.8
WESTERN	175	2 641 850	146	2 221 406	5.85	-15.9
▪ including outside border zone	1	40 000	15	555 100	1.46	1287.8

Source: as for table 1.

Table 13. Smuggling of cigarettes discovered by the Border Guard in the years 2001 – 2002 (in zlotys)

Border section	Years		Structure in 2002 in %	Growth rate in %
	2001	2002		
POLAND	14 368 534	28 888 320	100.00	101.05
Including:				
EASTERN	9 890 717	21 203 603	73.40	114.38
▪ with Russia	4 496 338	14 528 181	50.29	223.11
▪ with Lithuania	1 086 280	1 064 611	3.69	-1.99
▪ with Belarus	1 539 505	2 408 082	8.34	56.42
▪ with Ukraine	2 768 594	3 202 729	11.09	15.68
SOUTHERN	432 888	614 383	2.13	41.9
▪ with Slovakia	48 230	31 960	0.11	-33.7
▪ with the Czech Rep.	384 658	582 423	2.02	51.4
WESTERN	3 301 093	2 483 126	8.60	-24.8
▪ including outside border zone	54 100	1 380 136	4.78	2 451.1

Source: as for table 1.

Table 14. Smuggling of alcohol discovered by the Border Guard in the years 2001 – 2002 (in zlotys)

Border section	Years		Structure in 2002 in %	Growth rate in %
	2001	2002		
POLAND	14 675 419	25 073 074	100.00	70.85
Including:				
EASTERN	12 390 554	22 079 480	88.06	78.20
▪ with Russia	1 786 546	3 067 436	12.23	71.70
▪ with Lithuania	79 100	38 293	0.15	-51.59
▪ with Belarus	3 001 449	2 628 865	10.48	-12.41
▪ with Ukraine	7 523 459	16 344 886	65.19	117.25
SOUTHERN	1 130 859	746 511	2.98	-34.0
▪ with Slovakia	322 426	174 330	0.70	-45.9
▪ with the Czech Rep.	808 433	572 181	2.28	-29.2
WESTERN	538 595	284 734	1.14	-47.1
▪ including outside border zone	59 430	801 874	3.20	1249.3

Source: as for table 1.

The share of the eastern border in the number of the instituted investigations was 40% in 2002, whereas it was slightly smaller in the number of the suspected and amounted to 32% (Table 15). At the described border section, the investigation was most often instituted for violation of art. 63-67 of the penal and financial code (import into the Polish customs area of goods bearing no excise sign) (73%) and for avoiding the customs duties (smuggling – 48%). On

the average every second attempt to organise crossing of the state border in breach of regulations (art. 264 §2 of the penal code) took place at the eastern section of the Polish state border, whereas the number of the instituted investigations for illegal crossing of the border (art. 264 §1 of the penal code) was almost 7 times lower than at the western border.

Table 15. Instituted investigations as per border section in 2002.

Specification	In total	Including border section:		
		Eastern	Southern	Western
Number of investigations	10 379	4 132	1 705	3 283
Number of suspects	5 625	1 783	973	2 223
Investigations as per legal qualification:				
▪ crossing of border in breach of regulations (art. 264 § 1 of pc)	2698	230	668	1 524
▪ art. 63-67 of pfc	2 533	1856	245	
▪ avoiding customs duty (smuggling - art. 85-96 of pfc)	2 275	1 082	419	
▪ forgery of documents (art. 270 pc)	1 039	178	64	588
▪ assistance in csbbr – art. 18 § 3 pc)	384	4	38	336
▪ crossing of sbbr by force – art. 264 § 2 pc	194	38	64	42
▪ organising of crossing of sbbr – art. 264 § 3 pc	101	48	8	42

Source: as for table 1.

In 2002 the Border Guard achieved the target condition of securing the external border of the European Union. The number of watch points increased by 15 in the years 2000-2002 (exclusively at the eastern border), including by 7 at the border with Ukraine. Since the moment of accession control at the internal border will be gradually abolished, first at the Polish-German border (the internal border will be protected at the same time, e.g. by consultation points of the Border Guard). At all sections of the land border the average density of the Border Guard's watch points will meet standards of the European Union – a requirement of maximum 25-kilometer distance between watch points.

Adaptation of the organisational system of the Polish border services to the binding rules in the European Union is a difficult and costly task. The Union's assistance for Poland concerning integration will amount to ca. **0.3%** of GDP, whereas **Poland's costs of adaptation to the Union's standards** concerning environmental protection standards, infrastructure development and labour standards are evaluated at **7%** of GDP yearly. The European Union presented Poland 13 directives concerning our border that must be met in order to assure safety on the Union's external borders and to facilitate legal turnover of goods and flow of persons. In order to meet the Union's regulations Poland noticed termination of agreements on visa-free traffic with 15 countries. It is estimated that Poland will issue ca. 3.5 million visas yearly. Visas for citizens

of Russia and Belarus (paid) and Ukraine (free) will be introduced since 1 October 2003 (initially it was planned since 1 July).

The Polish customs services will be also responsible for payment control of export subsidies within the Single Agricultural Policy. The border administration will also have its share in collection of means for the membership fee paid to the budget of the European Union. The fee is to include revenues from VAT, excise and customs duties. The Polish customs must also shorten the time of border clearings to two hours. It is assumed that it will be possible thanks to universal application of simplified procedures. Thanks to them carriers will be able to clear themselves at the border, and possible procedures will be applied after crossing at internal customs points. At present in Poland only ca. 700 firms out of 120,000 firms engaged in international trade take advantage of such possibilities. At the eastern border Poland is going to make clearances in commodity traffic jointly with customs services of neighbouring countries. Some **threats** must be noticed in accomplishment of this aim, in the light of the previous experience. It is assumed as optimal checking of 5% of transports crossing the eastern border and covering by extra-border controls 10% of transports from abroad. Along with an increase in dynamism of border traffic at our eastern border, after taking over the function of the external border of the European Union, an increase in transborder criminality should be expected, such as: organised illegal migration (especially from countries of Asia and Africa), smuggling of alcohol, cigarettes, drugs, weapons and ammunition, smuggling of cars coming from theft on the territories of Poland and Western Europe, committed by special international criminal groups, and of cars reported as lost, to the CIS countries, inflow to Poland of members of criminal groups coming from the CIS countries and transfer of their activity to the territory of our country, and especially to the regions of more important communication routes, and the phenomenon of corrupting officers of border services by international criminal groups.

It should also be expected that transborder criminality will be surely transferred from the western border to the eastern one. Moreover, at the moment when Poland becomes the member of the European Union, a change in character of illegal migration should be expected, from transit migration (to rich countries of the Union) to the target one to Poland. At the same time it should be stressed that our eastern border will constitute **the longest** land section of the external border of the European Union, protected by one country (having from 1,143 km, if Lithuania is admitted to the European Union at the same time as Poland, to 1,245 km). Moreover, the external borders of the European Union will not be automatically the same as the borders of the Schengen area (an agreement of 19 June 1990, assuming, e.g., that internal borders may be crossed at any place and at any time without any control of persons).

Streszczenie

WSCHODNIA GRANICA UNII EUROPEJSKIEJ – SZANSE I ZAGROŻENIA

W artykule podjęto próbę syntetycznej charakterystyki specyficznych cech granicy wschodniej Polski, która w nieodległej perspektywie stanie się zewnętrzną granicą Unii Europejskiej.

Udział granicy wschodniej w osobowym ruchu granicznym ogółem wyniósł 15,3%, w tym w ruchu paszportowym 17,9% (brak małego ruchu granicznego) oraz w tzw. ruchu uproszczonym 11,6%. Straż Graniczna odmówiła prawa wjazdu na terytorium Polski 51814 osobom, z czego aż 78,6% na granicy wschodniej. Udział tej granicy w ruchu środków transportu osiągnął w 2002 r. 17,4%, w tym autobusów 33,2%, samochodów ciężarowych 25,1% oraz samochodów osobowych 16,2%.

Straż Graniczna zatrzymała za przekroczenie i usiłowanie przekroczenia granicy państwowej wbrew przepisom 5 372 osoby, w tym na granicy wschodniej 12,3%. Większość usiłowała przekroczyć granicę poza przejściami – 56%. Zauważamy postępujący proces uszczelniania, przed nielegalnymi migrantami, granicy zachodniej.

W 2002 r. zatrzymano, na podstawie przepisów ustawy o cudzoziemcach, 8204 osoby, w tym 3551 obywateli państw graniczących z Polską na wschodzie (43,3%), wśród których najliczniejszą grupę stanowili obywatele Ukrainy (28,9%). Obywatele państw graniczących z Polską od wschodu stanowili ponad połowę liczby zatrzymanych cudzoziemców z powodu prowadzenia działalności handlowej bez zezwolenia oraz wykonywania pracy bez zezwolenia.

W ramach readmisji przekazano z Polski 4836 osób, w tym na odcinku wschodnim 58,4%. Najczęstszymi powodami wydalenia z Polski cudzoziemców było przekroczenie granicy państwowej wbrew przepisom (32,9%), naruszenie art. 13 ustawy o cudzoziemcach (28,5%), nielegalny pobyt (24,2%) oraz nielegalna praca (11,9%).

Straż Graniczna udaremniła przemyt wartości 106 mln zł, z czego 71,8% przypada na granicę wschodnią. Na omawiany odcinek granicy przypada 88,1% ujawnionego przemytu alkoholu, 81,6% przemytu samochodów (według ich wartości) oraz 73,4% przemytu papierosów.

W 2002 r. został osiągnięty przez Straż Graniczną docelowy stan zabezpieczenia zewnętrznej granicy Unii Europejskiej. Liczba strażnic wzrosła w latach 2000-2002 o 15 (wyłącznie na granicy wschodniej), w tym o 7 na granicy z Ukrainą. Od momentu akcesji będzie stopniowo znoszona kontrola na granicy wewnętrznej, w pierwszej kolejności na granicy polsko-niemieckiej. Na wszystkich odcinkach granicy lądowej przeciętna gęstość strażnic Straży Granicznej spełni standardy Unii Europejskiej.

Unia Europejska przedstawiła Polsce 13 wytycznych dotyczących naszej granicy, które należy bezwzględnie spełnić, w celu zapewnienia bezpieczeństwa na wewnętrznych granicach Unii oraz ułatwienia legalnego obrotu towarowego i przepływu osób. Aby dostosować się do unijnych regulacji Polska wypowiedziała umowy o ruchu

bezwizowym z 15 krajami. Polska zamierza na granicy wschodniej dokonywać odpraw w ruchu towarowym wspólnie ze służbami celnym sąsiednich państw. Jako optymalne przyjmuje się sprawdzanie 5% transportów przekraczających wschodnią granicę oraz objęcie kontrolami pozagranicznymi 10% transportów z zagranicy. Wraz ze wzrostem dynamiki ruchu granicznego na naszej wschodniej granicy, po przejęciu funkcji granicy zewnętrznej Unii Europejskiej, należy oczekiwać wzrostu przestępczości transgranicznej: zorganizowanej nielegalnej migracji (zwłaszcza z krajów Azji i Afryki), przemytu alkoholu, papierosów, narkotyków, broni i amunicji, przemytu samochodów pochodzących z kradzieży na terenie Polski i Europy Zachodniej, dokonywanego przez wyspecjalizowane międzynarodowe grupy przestępcze, oraz samochodów zgłaszanych jako utracone, do krajów Wspólnoty Niepodległych Państw, napływu do Polski członków grup przestępczych wywodzących się z krajów WNP i przenoszenie ich działalności na terytorium naszego kraju, a zwłaszcza w rejonach ważniejszych szlaków komunikacyjnych oraz zjawiska korumpowania funkcjonariuszy służb granicznych przez międzynarodowe grupy przestępcze.

Należy także oczekiwać, że przestępczość transgraniczna nieuchronnie przesunie się z granicy zachodniej na granicę wschodnią. Ponadto, z chwilą uzyskania przez Polskę członkostwa Unii Europejskiej, należy się spodziewać zmiany charakteru nielegalnej migracji z tranzytowej na docelową do Polski. Wschodnia granica Polski będzie stanowić **najdłuższy** odcinek lądowy zewnętrznej granicy Unii Europejskiej ochraniający przez jedno państwo. Ponadto zewnętrzne granice Unii Europejskiej nie będą się automatycznie pokrywać z granicami obszaru Schengen.

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TRANSPORT AND TARIFF PREREQUISITES FOR THE DEVELOPMENT OF THE EASTER AREAS OF POLAND IN THE ASPECT OF INTEGRATION PROCESSES

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Introduction

The European Union membership is a strategic objective of Poland. Reaching economic, social and spatial cohesion with other European countries constitutes an important reason for Polish integration aspirations¹. It is of great importance to use a pre-accession period to get prepared for the EU accession and to undertake key activities whose effects will condition a balance of benefits resulting from the opportunity to participate in the decision processes of the united European community.

Polish transportation and tariff system belongs to the spheres whose adjustment to the European Union standards may be deemed as priority determinants of integration processes. Integration with the European Union means a necessity to face fundamental problems of the European policy and to implement the EU programmes.

Since the very beginning of the European Community transportation sector has been perceived as a crucial factor that determines emergence of a homogenous market. As a result of its transit location in Europe Poland enjoys transportation infrastructure corridors of a continental importance. In the east of Poland they include:

- Corridor I: Helsinki - Tallinn - Riga - Kowno - Warsaw (including a branch line from Kowno via Kaliningrad to Gdansk),
- Corridor II: Berlin - Warsaw - Minsk - Moscow - Niznyj Nowograd, and
- Corridor III: Dresden - Wroclaw - Katowice - Krakow - Lwow - Kiev.

Along the corridors it is possible to observe processes of concentration of different business activities resulting in spatial transformations and regional

¹ *Narodowy Plan Rozwoju 2004 – 2006 (National Plan of Development 2004-2006)*. A document passed by the Cabinet on 14 January 2003, Warszawa 2003.

development. The transformations in question will also bring about a qualitative change of eastern areas of Poland. Polish eastern border areas are different than western or southern ones. Differences include a peripheral location, a low level of urbanisation, large share of farming areas and forests, worse living conditions that result from much poorer economic development, high rates of migration and a low level of natural environment degradation². Having completed the accession process the eastern border of Poland will become the longest external land border of the European Union. Polish customs will have to accept a responsibility for security provision simultaneously ensuring correct realisation of control procedures as far as people and goods crossing borders are concerned.

Polish accession to the European Union requires high expenditures on transportation and functioning of customs administration. They are mainly connected with a development of infrastructure and adoption of the EU regulations that concern security, technical standards, environmental protection, etc.

This article is an attempt to analyse selected activities that adjust Polish transportation and tariff system to the EU standards. It is possible to agree with a hypothesis that development opportunities of the Eastern border areas in Poland depend on the influence level and scale of macro and microeconomic factors in transportation and customs that refer to infrastructure, harmonisation of standards and regulations and adjustment of transportation companies and Polish customs administration to the integration with the European Union.

Adjustment activities within transportation to meet the European Union standards

Adjustment of the Polish transportation system to the European Union requirements poses a challenge that results in treating the EU transportation policy and legislation as the prerequisite for transportation development.

The European Union Strategy for Sustainable Development adopted in June 2001 is one of the key documents that characterise the European Union policy. This document enumerates six major threats to the functioning of the European society including transportation-related issues. The most important problems the European transportation policy is being concentrated on include restoring inter-sector equilibrium, disposing of transportation system "bottlenecks" and prioritising of users in the transportation policy.

Restraining expansion of car transportation services in order to strengthen other branches of transportation including mostly railway should be carried out

² M. Zdulski: *Polskie doświadczenia we współpracy transgranicznej*. Realizacja Funduszu Małych Projektów PHARE CBC. Copyright by Stowarzyszenie Gmin Polskich Euroregion Nysa. Jelenia Góra 2002, p. 198.

by means of improving their competitiveness on the transportation market and supporting investments oriented at these particular branches of transportation. Main instruments that are going to be used to reach these objectives are as follows³:

- performing internationalisation of external costs of transportation;
- establishing a homogenous system of tolls in road transportation;
- prioritising investments in public, railway, and combined transportation, coastal craft and inland navigation;
- reconsidering the development plans of the trans-European networks - based on the substantial limitation of financial means granted within the European Union structural funds to support road transportation; and
- continuing a liberalisation process of the European aviation and railway market.

As a result of the adopted strategy a White Book was prepared. It shows directions of the transportation policy until 2010⁴. Separating economic growth from the volume of efficiency indicators by increasing effectiveness of functioning of transportation means is a key objective presented in the Book. What is more, a so-called railway revolution i.e. opening of a market of railway services in the Trans European Railway Freight Network (TERFN) in 2003 and in the whole network of the enlarged European Union in 2008 was comprehensively discussed. According to this document railway recovery requires involving railway in the common market – so mainly opening national markets of freights (for coasting services as well), optimising railway infrastructure utilisation and improving quality of services rendered.

Declarations that refer to estimates of external costs of transportation understood as social costs generated by transportation means but not covered by individual carriers are of much importance for the European transportation market and a position of railway companies that organise freights to compete with road transportation. External costs that are generated while carrying out transportation are related with the sources of their generation including accidents, noise, exhaust, climate change, change in nature and landscape, additional costs in urban areas, extra costs related with production of energy and transportation means, and construction and maintenance of transportation infrastructure⁵. Any catalogue that describes factors generating external costs should also include

³ A. Skala-Poźniak: *Aktualne kierunki polityki transportowej*. „Przegląd Komunikacyjny”, 5/2002.

⁴ *Biała Księga Komisji Europejskiej pn. Europejska polityka transportowa w horyzoncie do 2010 r.: czas wyborów* (COM (2001) 370).

⁵ A. Wielądek: *Koszty zewnętrzne transportu* [in] *Współczesne technologie transportowe*. Praca zbiorowa pod redakcją L. Mindura, Politechnika Radomska, Warszawa 2002, pp. 409-411.

traffic intensity and its related notion – congestion. There is no doubt that these costs are of a measurable value and they belong to social costs.

Nowadays participation of particular branches of transportation in external costs whose effects are manifested in such sectors of economy like healthcare, environment, etc. do not directly influence prices of services that are offered by different branches of transportation. There are no universal and efficient systems of calculating these costs. As a result car transportation enjoys a relatively huge participation in generating external costs although it does not bear costs proportionally to the costs it generates. Such a situation results from the fact that road transportation occupies a position that is somehow privileged on the market of transportation services. Therefore differences in tariffs together with not including external costs generated by particular branches of transportation constitute problems that have to be solved. Elaboration by the EU institutions of a system of charges related with a compensation of external costs that are generated by particular branches of transportation will positively influence future relations on the transportation market.

Specific domestic conditions and Polish transportation policy are also of much importance for the future of the Polish transportation market and for the functioning of entities that carry out freights within this market. Principles and directions of regulating Polish transportation market generally follow rules that are binding in the European Union. It means market liberalisation that would include consumer protection principles, antimonopoly law and strict observance of law. Instruments that are to help implement these rules include separation of public administration from economy and processes of ownership transformation in companies⁶. However, changes in transportation – although they follow European trends – have to be characterised by specific domestic conditions.

Adjustment of Polish transportation to the EU economic principles that are focused on companies should first of all include acquisition of abilities to function on the international markets. Subject relations in the market economy are not characteristic for integration only. They by their nature refer to profits that constitute foundations of the market economy. Market generates corporate behaviour. Companies have to react quickly to adopt changing demands and tastes of customers, innovations and better quality of services provided. Functioning of business entities, their strategies together with scope and scale of business ventures are all influenced by many factors that create external and internal conditions. Aspirations of Polish transportation companies to function

⁶ *Polityka transportowa państwa na lata 2001-2015 dla zrównoważonego rozwoju*, Ministerstwo Transportu i Gospodarki Morskiej, Warszawa, październik 2001 r., (The State Transportation Policy for the Sustainable Development, Ministry of Transportation and Marine Economy, Warsaw, October 2001), p. 6.

on the European and global markets require mastering of an ability to find a proper place in structures of the international exchange. Transportation companies that wish to find their beneficial position will be made to create new competencies and adopt new patterns of carrying out business activities. Their adjustment abilities will be manifested by, inter alia, the level of adopting and implementing modern technologies, equipment and production organisation that guarantee quality, cost and tempo of production required by the European Market, and also by acquiring principles of modern marketing in everyday practices of management. For Polish transportation companies it also means a necessity to implement - and in majority of cases - to create modern models of organisation, management and communication with the market. Adaptation process starts from taking on a constant rule that would determine all activities to be undertaken. According to this rule it is necessary to introduce indispensable adjustments that ensure flexibility of a company on the basis of permanent collection and analysis of information on market participants' actions and determination of own assessments and resulting from them market behaviours. Transportation companies have to acquire skills of creating and stimulating probable systems of regulation of global market actors valuing their importance and the scope of innovativeness. Major fields of adaptation of global market principles are realised on the following four levels of functioning⁷:

- management level;
- economic and financial level;
- marketing level; and
- motivation level.

Directing adaptation within management of transportation companies is first of all based on carriers' capacity to face changing market environment. Adaptation within the economic and financial level covers problems of a financial accumulation ability and autonomous generation of processes of transportation means regeneration. Within the marketing level it means carrying out research on preferences and behaviour of demand spheres and analysing of competitive behaviour. Motivation level involves issues related with patterns of the European Union remuneration levels and social protection of labour conditions. Each of the discussed levels constitutes an integral issue in the adjustment processes as far as the European Union requirements are concerned, and that is why some packages of legal regulations have to be adopted by Polish economy within negotiation procedures.

⁷ K. Szałucki: *Mechanizmy adaptacyjne polskich przedsiębiorstw transportowych wobec rynku globalnego* [in] *Dostosowanie polskiego transportu do Unii Europejskiej. Wyzwania dla przedsiębiorstw*. Praca zbiorowa pod red. D. Rucińskiej. Wydawnictwo Uniwersytetu Gdańskiego, Gdańsk 2001., pp. 46-47.

Reaching full membership in the European Union requires harmonisation of Polish legal regulations that would result in the high quality of transportation services provided. The European Community created a consistent regulation system of a transportation sector. Supporting entrepreneurship a model of positive behaviour is being promoted and condition of fair competition and customer protection are being determined. Common concepts that are worked out in the legislation and that refer to homogenous rules that govern establishment of transportation companies, access to the profession of a carrier, technical, social and fiscal harmonisation altogether enable reaching internal cohesion of a transportation system and – simultaneously - functioning of a homogenous market. Regulative system of transportation is created not only by means of regulations that refer to the very sector e.g. railway law but also by means of legislation of a more general nature like fiscal law, labour law, antimonopoly law or regulations that protect customers, etc.

For the time being Polish transportation companies have to function in a complicated economic and market situation. There is a shortage of indispensable regulations and such a situation reduces efficient performance on the domestic and international markets. Legal gaps and inconsistencies together with inefficient actions that are undertaken by the ministry in order to improve competitiveness of Polish companies may turn out to be a major limitation in the relatively short perspective of Polish accession in the integrated transportation structure. Such circumstances do not facilitate undertaking of constructive actions in the macroeconomic scale. What is even worse, they radically discourage majority of small companies of the transportation sector from undertaking necessary substantial changes and difficult revaluations with reference to the approaching moment of entering transportation structures of the European Union.

Liquidation of a competitive gap is the most important element of shaping Polish economy in the conditions of integration. It has to be remembered that a competitive advantage may be of a multilevel - qualitative, quantitative, pricing or informative - nature. In the Polish transportation policy a question of transportation services quality used to be poorly highlighted what differs it diametrically from the transportation policy of the European Union. It is in the interest of Poland to undertake a common strategy of improving transportation quality by means of changing behaviour of carriers⁸. Neglecting of this task may lead to widening of a competitive gap between Polish and Union transportation entities. Another problem lies in the fact that Polish entrepreneurs should acquire abilities to observe the market, especially as far as changes of needs are concerned. Market information should become a fundamental factor of a market

⁸ B. Kromer: *Skutki integracji Polski z UE w sferze systemowej transportu*. „Przegląd Komunikacyjny”, nr 11/2002.

success for transportation companies. Furthermore apart from rendering high quality services, transportation companies should find customers. Integration of Polish transportation with the European Union will result in the development of a competitive transportation market that is customer oriented.

Polish transportation companies' ability to adapt and opening of transportation markets as a result of integration processes are interrelated by some risk. The risk accompanies business activities both while entering the Union market in the association period and during undergoing integration processes just after the EU enlargement. Risk assessment and its reduction depend on the situation of a given company and the way its market environment is recognised in different aspects: technological, economic, social, legal or political ones⁹. Technological risk is a major problem of transportation companies. In the short period it is reflected in the barrier that makes companies adjust their services to competitors who utilise more advanced technologies. In the long run it may be perceived as some uncertainty of technological progress whose changes are difficult to foresee.

In the market economy crisis situations are a common phenomenon for many transportation companies. Competitive market, change in the financial situation of contractors, dramatic decline in demand for freights, lack of means to renew fleet, etc. lead to inconsistency between existing vision of a company, implemented strategic policy and changes that take place in the environment. It is a situation that requires carrying out some changes or a major modification of the company's present plan of action. Each implementation of a new venture may finally turn out to be an opportunity for a transportation company that will perceive it as a market success. It may also be a failure. Current situation of majority of transportation companies in Poland including threats that hamper processes of reorientation undoubtedly proves that these companies must immediately undertake restructuring and adjustment activities that are adequate to the requirements of the homogenous market – of course if they want to be able to sustain their present positions on the transportation market¹⁰. Polish transportation companies are characterised by very diversified development capacities. Some of them function effectively in the present transition conditions and enjoy adequate strategic potential – such a situation allows for forecasting their development. However other companies keep trying to overcome different difficulties that are characteristic for the market economy. For these companies

⁹ M. Wierzińska: *Ryzyko w gospodarce rynkowej*. Wydawnictwo Uniwersytetu Marii Curie-Skłodowskiej, Lublin 1996, p. 16.

¹⁰ A. Szewczuk: *Przedsiębiorstwo transportowe w okresie transformacji rynkowej – szanse i zagrożenia*. [in] *Wspólna Europa. Szanse i zagrożenia dla transportu*. Praca pod red. W. Januszkiewicza. TRANS'95. Kolegium Gospodarki Światowej, Warszawa 1995, p. 132.

development is not a key issue. They simply want to survive and maintain - at least partially – present position on the transportation market.

Transformations of the Polish customs system vs. the European Union requirements

East and Central Europe countries' accession (including Poland) to the European Union will alter an economic map of the European continent. The map will be divided into two regions: countries united by the customs union and those that are not included in the integration processes i.e. Russia, Belarus or Ukraine. As a result of the accession process Polish borders will become external and internal borders of the European Union. In both cases there are necessary adjustment activities to be undertaken within:

- harmonization of customs and duties law;
- more effective organisation of customs administration; and
- compatibility of the information technology systems.

Customs regulations refer to the following basic issues:

- 1) implementation of bans and quantitative limitations together with other elements of foreign trade in goods control including permits, concessions, special trade and others;
- 2) utilisation of legal and financial instruments in form of duties and other tariffs including total or partial customs exemptions, tariff quotas, tariff ceilings or border taxes in form of taxes on goods and services and excise duties;
- 3) utilisation of particular forms of domestic or integration association market protection from excessive inflow of goods into the Polish customs area or from import of goods at dumping prices by means of utilisation of protective measures that may be implemented due to undertake protective procedure;
- 4) introduction of goods into the Polish customs area and recognition of their customs destination (customs clearance, free customs area or duty free bonded warehouse, sending goods back out of Polish customs area, destruction of goods or goods renouncement for the State Treasury) and declaring goods for adequate clearance procedure;
- 5) implementation of particular customs procedures including:
 - a) procedure of letting goods enter trade;
 - b) transit procedure;
 - c) export procedure;
 - d) economic procedures;
- 6) customs liability;
- 7) customs control and customs inspection;
- 8) running business activity in form of a customs agency; and

9) customs proceedings.

The structure of customs law presented above directly results from the Act dated 9 January 1997 – The Customs Code¹¹ – that came into force on 1 January 1998. The Act conforms to the regulations of the Community Customs¹². Moreover basic legislation sources that are currently binding in Poland include:

- the Act dated 29 November 2000 on foreign trade in goods, technologies and services of strategic nature for the State security and for maintaining international peace and security and amendments¹³;
- the Act dated 11 April 2001 on protection against the excessive import of goods into the Polish customs area¹⁴;
- the Act dated 21 June 2001 on protection against the excessive import of some textiles and clothing into the Polish customs area¹⁵;
- the Act dated 24 August 2001 on protection against import of dumping goods into the Polish customs area¹⁶;
- the Act dated 21 June 2002 on protection against import of subsidised goods into the Polish customs area¹⁷;
- the Act dated 26 September 2002 on administration of foreign trade in goods and amendments of the Act – Customs Code and other amendments¹⁸.

Legislation works to reach complete harmonisation are still in progress. Subsequent amendments of the Customs Code introduced, inter alia, an opportunity for implementing simplifications in customs procedures and facilities while submitting customs declarations, standardisation of conditions that apply while providing guarantees, extension of a catalogue of situations when allowance of compensative goods is carried out on the basis of a total duty exemption¹⁹.

The first day of Polish accession will bring a necessity to follow directly regulations of the Community Customs Code together with executory provisions and other legal acts that refer to customs in form of the Council or the EU Commission ordinances (regulating e.g. issues of customs exemptions, control of import of pieces of art, fighting fake and pirate goods) and finally the Euro-

¹¹ Journal of Laws Nr 75 item 802 as later amended

¹² Council Regulations EEC No 2913/92 of October 1992 establishing the Community Customs Code OJ 1992, L 302.

¹³ Journal of Laws Nr 119 item 1250 as later amended.

¹⁴ Journal of Laws Nr 43 item 477 as later amended.

¹⁵ Journal of Laws Nr 110 item 1188 as later amended.

¹⁶ Journal of Laws Nr 123 item 1352 as later amended.

¹⁷ Journal of Laws Nr 125 item 1063.

¹⁸ Journal of Laws Nr 188 item 1572.

¹⁹ A. Grabowska: *Kodeks celny po europejsku*. „Rzeczpospolita” 23 April 2003 r.

pean Union agreements concluded with third parties. It has to be noted that a harmonisation process of customs legislation is facilitated by Poland's and the EU countries' membership in such international organisations as the World Trade Organisation (WTO) and the World Customs Organisation (WCO) and in the same customs conventions like e.g. SAD, WPT, Istanbul or Kyoto.

Polish Membership in the European Union necessitates a verification of numerous agreements and what is more it requires ceasing trade carried out on the basis of economic agreements concluded in the past. It means that Polish trade with partners representing the integration association is going to be facilitated. However trade with other countries will have to be regulated by the EU principles.

Structural adjustment of Polish customs administration to functioning within the European Union structures and conditions is another important area of integration activities. Although the Community law does not interfere with administrative structures of particular member countries some standards have been worked out. The standards in question refer to some areas of activities like organisation and management of border control of trade, travellers who cross borders and means of transportation. These standards provide for emergence of such solutions and structures that will ensure both effective control of external borders of the European Union and efficient servicing of international trade carried out in compliance with the law.

Changes in organisation of Polish customs administration effective since 1 May 2002 were introduced by the Act dated 20 March 2002 on transformations in customs administration and amendments of some acts²⁰. This regulation – apart from provisions that introduce restructuring transformations in the customs administration and liquidate the Central Customs Office²¹ - includes changes in the customs code, the Act on Civil Service and twenty other acts. Executory acts that make it possible for the customs administration to function in the new structure were issued as well.

Reorganisation of customs administration resulted in the following system of competencies of particular customs bodies:

- in the customs section of the ministry of Finance four departments were created:
 - 1) Department of Tariffs whose responsibilities include servicing of a legislation process, supervision over standardisation of application of regulations by customs administration, analysis of judicial decisions of courts,

²⁰ Journal of Laws Nr 41 item 365.

²¹ Position of the Chairman of the Central Customs Office as a customs institution was abolished by the Act dated 30 April 2002 on changes in organisation and functioning of governmental administration bodies and their agendas and some amendments (Journal of Laws Nr 25 item 253). However principles and forms of a new body were supposed to be determined by a new act.

dealing with issues related with international agreements and activities that aim at harmonisation of customs law;

- 2) Department of Organization of Customs Service that deals with monitoring and analysing of foreign trade, evaluating of ongoing performance of the Customs Service, preparing answers to Members' of Parliament queries, organisation of trainings, co-operation with media on customs affairs, planning and realising of the Customs Service budget;
- 3) Department of Customs Control that evaluates and supervises functioning of customs chambers and offices, undertakes activities to fight and prevent customs crime; and
- 4) Department of Excise Duty whose tasks include preparing suggestions of guidelines for the government within the excise duty, monitoring foreign trade of goods subject to excise duty, preparing customs bodies to function as fiscal bodies authorised to collect excise duty and co-operation with the European Union Excise Duty Committee.

The Minister of Finance is responsible for undertaking adequate actions in such individual customs cases like providing Binding Tariff Information and Binding Information on Origin, dealing with representation in customs affairs;

- central level is represented by the Director of the Chamber of Customs who apart of his local competencies is responsible for individual proceedings within granting permits to use TIR transit procedure on the whole Polish customs area. The Director also makes decisions in cases of protection of intellectual property with reference to the import of goods;
- regional level is represented by directors of regional chamber of customs who – together with their whole executive powers – function as the second appeal instance for decisions and provisions issued by the first instance (heads of customs offices). They also grant transit permits that refer to the transfer of rights and responsibilities of those who run bonded warehouses, application of so-called simplified procedures according to the WPT convention, application of securities, refunds and exemptions of customs and finally they accept guarantee deposits from customs agencies;
- local level is represented by heads of customs offices together with their whole executive powers whose competencies include control of vehicles that perform international transportation as far as those vehicles weight and weights per axle or other specific traffic regulations are concerned. They also accept customs declarations and grant transit permits.

Such organisation enables concentration of chambers of customs on strategic tasks that concern rationalisation of customs offices location and enlargement and strengthening of functions of statistical analyses.

The range of issues that refer to preparation of Polish customs service to perform duties in the conditions of the European Union market is really exten-

sive. Customs officers who are currently employed in border customs offices may have to face new responsibilities that are connected - inter alia - with working in mobile and operational groups, controlling within the common agricultural policy or fighting illegal employment. Controlling tasks of mobile groups will be realised on the EU area within borders of the Republic of Poland. The groups' responsibilities will include among others controlling of observance of customs law regulations and other regulations that concern import and export of goods - in particular goods of non-community status. The mobile groups will also undertake controls of trade in banned or restricted goods including drugs, radioactive materials, pieces of art, etc. Moreover customs administration will realise tasks connected with operational activities that aim at fighting customs, fiscal and currency crimes.

The Parliament Commission of Public Finances is still working on the final version of the so-called consolidation act. The act provides for giving customs services numerous new competencies including in particular competencies of a fiscal body, extension of execution powers and - first of all - many tasks connected with performing specific excise duty supervision and taking over authorities to label goods with treasury stamps of the excise duty.

Integration means abolition of customs barriers. However it does not equal abolition of supervision over trade in goods within the European Union. The accession will bring registration of Polish trade with the EU countries by means of the INTRASTAT system that has been functioning in the Union since 1 January 1993²². The system will only be used for statistical purposes. The Central Statistical Office will store data sent by entrepreneurs who trade with the EU countries. Each importer and exporter who declares carrying out trade with the EU for VAT purposes and who exceeds pre-determined value thresholds²³ will be obliged to send (monthly) statistical declarations to regional offices of the Central Statistical Offices or submit appropriate documents electronically to the Warsaw headquarters. The system has to be provided with information on goods exported out of the European Union to another state and transported into such a state or processing under customs supervision in a member country but aimed for another EU country, ships and airplanes whose ownership is transferred from a person based in one country of the Community to another person based in another EU country, etc. The system will not cover entrepreneurs who are exempt from submitting periodic tax declarations, companies and individuals who trade in goods subject to transit, goods in bonded

²² European Economic Community Act Nr 3330/91 dated 7 November 1991 on statistics of trade in goods among member countries of the European Union.

²³ These are quantitative limits according to which information transfer may be suspended or limited. Statistical thresholds binding for the whole reporting year are separately determined by member countries of the European Union.

warehouses, goods that are temporarily let to be traded and some goods that are excluded from statistics.

INTRASTAT system of statistics is a common and standardised system of the EU member countries. At the same time flexibility of the system allows for including specific needs and solutions of particular European Union countries. Hitherto functioning system of reporting trade exchange by means of SAD will be used on the eastern border of Poland. It is important that methodological assumptions of statistical research within the INTRASTAT system are comparable with methodological assumptions of foreign trade statistics based on information coming from SAD documents. Therefore these two systems are based on guidelines provided by the statistics methodology of trade in goods worked out by the United Nations Department of Statistics.

While negotiating Polish membership in the European Union an issue of equipping Polish customs offices with tools of modern information technology was suggested as one of the prerequisites for Polish customs services' taking on of customs control on the future western border of the Community. At present the following systems are being prepared for implementation: NCTS, ISZTAR2, TQS, EBTL, ISPP and SEED.

It has to be stressed that all chambers of customs use a system of financial, fiscal and accounting settlements – ZEFIR. By the end of this year the system application will have been installed on the central level simultaneously completing projected IT investments in this field. At the same time a system of processing of customs declarations – CELINA is being implemented all over Poland. While utilising of the system numerous benefits were observed including shortening of documents registration to 10 seconds, shortening of dealing with customs documents to approximately 30 minutes, limitation of “subjective” treatment of declarations and an immediate access to information on the present status of a document²⁴.

Another important problem – increase in capacity and rationalisation of border procedures - is undertaken by bodies that participate in the Strategy of Integrated Border Management in 2003-2005 passed by the Council of Ministers. A number of actions that aim at minimising difficulties while crossing borders were undertaken. In the last period new border crossings in Korczowa, Krościenko and Zosin were built and the ones in Dorohusk, Gołdapia, Kuźnica, Bobrowniki and Kukuryki were modernised. There are plans to rebuilt border crossing in Kozłowicze and Hrebenne. These undertakings do not fully solve problems of lengthy border procedures. There are more factors of significant nature that affect waiting time for clearance including different control mechanisms on the border and application of various customs procedures by customs services from countries behind the Eastern border of Poland.

²⁴ *Celina wytrwale do przodu.* „Monitor Prawa Celnego” 4/2003 r.

Conclusions

Balancing benefits and costs of economic integration faces numerous difficulties because of unknown real effects of integration. Generally both literature of the subject and official governmental documents pay attention to the fact that advantages for the whole economy and society outweigh drawbacks²⁵. However it does not mean that in the dimension of particular branches this proportion is going to be repeated. It may be assumed that in case of the transportation system and customs system as well – because of serious underdevelopment of infrastructure – expenditures that are necessary for adjustment will initially exceed direct benefits within some years after integration as a result of capital inflow and an increase in business effectiveness. Having entered the European Union Poland may face an effect of accumulation of negative factors and such a scenario should be taken into consideration. On one hand these negative factors will include consequences of implementation of standardised legislation and on the other – effects of functioning in a totally new system of the common market and forced adjustments of organisational and technological nature that result in the increase in general costs to be borne.

Approaching membership of Poland in the European Union lead to the increase in value of information on the Union financial help. However, first of all one has to realise that these means will not meet expectations and their utilisation involves completion of numerous conditions including the following ones:

- compatibility of projects with the European Union policy;
- compatibility of projects with national and regional development programmes;
- preparing plans that determine methods and directions of utilising financial aid means;
- ensuring effectiveness of utilising means to be received; and
- overcoming barriers that are related with organisational and legal preparation of investment.

Getting access to the European Union funds is difficult and requires intensification of restructuring transformation and increase in knowledge necessary to construct projects that are compatible with the transportation policy of the European Union and also with national and regional programmes of development.

²⁵ *Raport w sprawie korzyści i kosztów integracji Rzeczypospolitej Polskiej z Unią Europejską*. Rada Ministrów, Warszawa 26.07.2000 r. (Report on benefits and costs of integration of the Republic of Poland with the European Union. The Council of Ministers, Warsaw 26.07.2000).

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Streszczenie

TRANSPORTOWO-CELNE UWARUNKOWANIA ROZWOJU OBSZARÓW WSCHODNICH POLSKI W ASPEKTCIE PROCESÓW INTEGRACYJNYCH

W artykule podjęto próbę syntetycznego ujęcia wybranych aspektów procesu dostosowawczego w dziedzinie polskiego transportu i systemu celnego do unijnych standardów. Przyjęto tezę, iż rozwój obszarów wschodniego pogranicza Polski zdeterminowany jest poziomem i skalą oddziaływań czynników makro- i mikroekonomicznych w sferze transportu i obsługi celnej, które dotyczą zagospodarowania infrastrukturalnego, harmonizacji norm i przepisów prawnych oraz dostosowania przedsiębiorstw transportowych i polskiej administracji celnej do integracji z Unią Europejską. Wiąże się to z koniecznością poniesienia poważnych wydatków obciążających finanse publiczne. Ważne jest także pozyskanie funduszy unijnych, których zagospodarowanie i efektywne wykorzystanie jest szansą dla wspierania rozwoju obszarów przygranicznych oraz integracji Polski ze wspólnotą państw zachodnich.

FUTURE SCENARIOS OF POLAND'S EASTERN BORDERLANDS

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Introductory notes

The future of Polish borderlands is undoubtedly associated with Polish integration into the European structures. A. Kukliński¹ emphasises that the process of eliminating all borders promoted by the European Union is very simple in a physical/material sense but very complex and lengthy as far as institutions, economy and people's conscience. Future scenarios of Poland's eastern borderlands refer to those more complicated and multidimensional processes. Many future scenarios seem to be very plausible but it is certain that:

- the future of new regions as well as the whole Europe will be much different than its today,
- the range of transformations of Poland's eastern borderlands will involve global rather than individual development.

It seems that regardless of any set future scenarios and implementing the idea of a common European market, common currency and the policy of the development equalization, current discrepancies in the development of Poland's eastern borderlands will still be detectable for many years. This must be considered while formulating any scenarios for this region. Long-lasting consequences of the establishment of former borders of partitioned Poland is the best example. Referring further back, the authors of „Contract for the Eastern Wall”² state „the legacy of the past – as far as transportation routes, the urban system and the level of urbanisation as well as the agrarian culture- dates back to times before the partitions of Poland. The time of the partitions of Poland led to further intensification of those considerable discrepancies”.

¹ Kukliński A., *Transformacja przestrzeni europejskiej (Discursive Article)*, Local and Regional Studies, Wydawnictwo Naukowe „Scholar”, Nr 1(1)/2000, p. 27

² Gilowska Z., Gorzelak G., Jałowicki B., *Kontrakt dla Ściany Wschodniej. Założenia*, Muncipium, Warszawa 1999, p. 20.

That is why, in future scenarios for regional networks we should:

1. provide for new global and regional processes and occurrences, which will indirectly determine the level of uncertainty about future development of the region. In European scenarios and those of Poland's eastern borderlands it may well be the idea of the EU discontinuation of granting subsidies for agriculture. .
2. take into account worldwide and European external conditions hitherto existing. In practice, it refers to development tendencies of globalisation, competition and economic innovations as well as informative and civic society. It is worth mentioning that these are mainly metropolises that make the centre of those processes. Thus, transformation trends indicate a metropolitan course of modern development processes.
3. recognise the future, that is, the level and mechanisms of regional development. The mechanism of functioning of regional networks generates different regional sensitivity to changes and, as a result, directly determines their future. A given response of a region to changes constitutes, besides unknown external conditions, the second component of uncertainty about predicting the future of spatial systems.

Combining those three elements together may generate various future scenarios. It needs to be emphasised that a scenario is, in a way, a concept of the future which results from different proportions of existing mechanisms and tendencies of development as well as probable new processes and occurrences in the future. This intuitive model of the future is usually an alternative system of a multiplicity of existing processes and predicted changes. Therefore, a scenario is not a simple description of the future, but rather a logical sequence of future events, processes and development directions, all resulting from the level of regional openness and its susceptibility to external and internal changes.

Hence, we create future scenarios to:

- identify the future much earlier and to specify the symptoms of future occurrences and processes
- show future conditions of development and the range of possible changes,
- identify possible directions of development and turning points, which are usually indicative of critical moments in any regional development,
- formulate spatial and regional policies and strategically manage regional networks,
- prepare for undertaking any action facilitating chances or for making attempts to prevent any dangers and threats.

Polish eastern borderlands

Regional material and immaterial resources are usually characterised by spatial continuity. Therefore, they may form the basis for separating bigger areas with similar development resources. For Polish regions, S Kurowski³ mentions two basic pivot lines of neighbourhood that is a parallel one- with west-east direction and a meridional one-with north- east direction. The former points to historical conditions of development and the later to natural differentiation. It appears that historical conditions are more important to the level of regional development of the voivodships than natural ones. In the context of historical conditions of development and a resulting differentiation between the level of development, we can distinguish two kinds of voivodships- located on the left bank and the right bank of the Vistula River. The voivodships of Poland's eastern borderlands, located on the right bank of the Vistula, will soon become the external border of the European Union.

All the regions of Poland's eastern borderlands show a very low level of development. The main problem of these regions is a marginal development, which means that the regions are neither able to generate development nor to absorb facility grants. Backwardness in development of those voivodships is so extensive, even in comparison to western voivodships, that they are not able to increase their competitiveness without external assistance.

It is well worth mentioning, that the regions which are open systems will always strive to maintain balance by creating new internal structures, allowing them to take any opportunity created in their surroundings. On the present level of development of Poland's eastern borderlands, the problem resolves itself into accelerating the process of systemic transformation, as automatic historical changes in stable regional structures and relations with the surroundings is usually very time-consuming. Structural adjustment to European standards must, thus, focus on the development of the sector of financial services, institutions assisting business innovative and enterprise. To guarantee access to information and contacts with international economy for the regions, it is necessary to develop information technology, telecommunication and information networks.

It seems that the future in the context of the European integration and a necessity of making up a deficiency in development will create chances of increasing unity of those regions with European regions. It is, however, indispensable to increase access to and intensiveness of utilisation of all regional resources both material and immaterial ones.

³ Kurowski S., *Zróżnicowanie przestrzenne gospodarki polskiej w 1974 i 1989 roku*, Towarzystwo Naukowe KUL, Lublin 1997, p. 17.

Individuality of regional development

Regional resources don't guarantee directly any development dynamics. Thus, different regions don't compete with one another for natural or material resources. They compete for the location of specific economic sectors, business centres, technological parks, airports, motorways and highways. A competitive region is the one whose quality of area will be able to create spatial promoters of development, which, in turn, will attract capital investors, innovators, tourists and specialists. Regions have always competed for adapting the area in the best possible way to make it attractive for investment, work, education, settlement and recreation.

Therefore, discrepancies in the development of Poland's eastern borderlands result not only from historical conditions of different regional resources, but also from the quality of adaptation of the region and ways of combining these resources. This mechanism determines the susceptibility of the region to any changes and possibilities of recovering its balance after changes.

The future of Poland's borderlands will be directly determined by a current level of development and also, and most of all, by its susceptibility to changes resulting from Polish integration into the EU. Current changes in one of the parts of European area may produce various results in other parts of the system or any similar consequences, but developed from other development paths. It is obvious that any change in the regional system or in the surrounding may lead to the instability of the system in many different ways. Opening Europe to the regions of Poland's eastern borderlands creates new opportunities for development but also constitutes many threats resulting from this openness. It is worth emphasising that even though a given change may be an impulse from outside, the reaction of the system to this change is always based on the rules of functioning of the whole regional system. This susceptibility to changes directly determines the future of regions.

Any susceptibility to changes results from a type of functional connection between various constituents of a regional system. It seems that a linear (additive) way of connecting a cause and effect interdependence is difficult to implement for regions. Linear interdependence means that, in the same conditions, a given cause leads to the same effects. This linear model hardly ever fits ideally to an analysed reality but it makes it possible to manage and predict the future state of such a system, given the initial conditions.

The difficulty in predicting the future results from non-linear mechanisms of regional development. These are those non-linear connections which determine high susceptibility of the region to any changes. Thus its immediate result which is uncertainty. It is obvious that uncertainty cannot be a determining quality of linear systems, which assume that a given cause leads to the same effect of a change. Therefore, uncertainty is only typical for multiplying sys-

tems which are generated by non-linear rules of connections between features and conditions of regional development. Non-linearity of connections and, thus, a very high susceptibility, makes even the slightest change in initial conditions lead to many different scenarios of development.

Regional systems, which are typically non-linear, can thus be chaotic in nature. It is the second, except uncertainty, component of new external conditions a component of uncertainty in predicting the future of regional systems. Determining chaos, as a property of non-linear dynamic systems, cannot be separated from the whole regional system. Thus, it must be treated as one of the components of regional development, the one shaping the future. The mechanisms of chaos are, therefore, recognised not to eliminate this phenomenon but rather to manage these chaotic systems efficiently, and, as a result, predict possible performance of regional systems.⁴

It is very difficult to predict future reality of Poland's eastern borderlands after integration into European structures mainly because of the phenomenon of determining chaos in regional systems. It is equally difficult to describe the future of these areas using the analysis of the past. A completely new quality will be created after the integration into European structures and this quality is not subject to any analogies in terms of time and space. Scenarios of the development of new phenomena can, therefore, be created on the basis of opinions using experts' knowledge, experience and imagination.⁵ Scenarios of future development of regional systems are, thus, an effect of possible conditions, both global and regional, properties of examined spatial systems and, in a way, the imagination of the authors of these visions of the future.

Future scenarios

We assume that the future of Europe, will result from the regularity of global rather than individual development, thus scenarios of Poland's eastern borderlands are strictly connected with scenarios of future Europe. The possibility of functioning of underdeveloped regions in the common European market, operating in accordance with world political, economic and social rules is the essence of the future scenarios of Poland's eastern borderlands. Interesting considerations of global pictures of the future were enclosed in the report by the European Commission „Scenarios Europe 2010. Five Possible Futures for Europe”⁶.

⁴ Domański R., *Przestrzenna transformacja gospodarki*, Wydawnictwo Naukowe PWN, Warszawa 1997, p.51 and 146.

⁵ One of the methods of predicting the future, based on experts' opinions is a delfian method.

⁶ Bertrand G., Michalski A., Pench L., R., *Scenarios Europe 2010. Five Possible Futures for Europe*, European Commission. Forward Studies Unit, 1999.

European idea of equalization of the level of development is an essential external condition of future development of weaker eastern borderlands. Despite all attempts taken by the EU and the regions in focus we will witness very infinitesimal changes in the regions of Poland's eastern borderlands. It is an immediate result of the creation of administrative regions, which led to decentralization of authority without accompanying decentralization of public finance. The lack of this self-dependence causes regional development be more and more dependent on administrative decisions made outside the region. Individual contribution is very important in any European project, yet the regions cannot guarantee such. Such a situation will make a reform of public finance sectors necessary.

Z. Rykiel⁷ says that even after Polish integration into the EU, the regions of Poland's eastern borderlands can be analysed in terms of worsening their situation. Only Suwałki region, will meet challenges as far as tourism, Warsaw-Terespol region in terms of trade with the East and Lublin region in terms of agriculture because of fertile soils. It seems that the scenario is probable, but it is more probable that discrepancies in the development of Poland's eastern borderlands would be more dynamic if it didn't integrate into the EU. Z. Gorzelak and B. Jałowiecki⁸ emphasising the backwardness of development of many European regions state that „educated and rich inhabitants of Prague, Warsaw or Budapest don't live in accordance with West-European time, that is at the turn of XXI century. A former Ukrainian kolhoz member, an Albanian shepherd, a Polish farmer or unskilled worker in a small town, a Rumanian villager in an of a bitten track village in Karpaty region still live in the XIX century” And they add ” the inhabitants of western parts of Poland, the Czech Republic and Hungary seem to be closer to Europe than those who live in eastern parts of those countries”.

There is one question, “will these people who are “far” from Europe find their own place in the structures after integration?”. Will new structures lead to further degradation of the eastern borderlands or perhaps will they give new impulses for development? Is it possible that a new regional system will generate turning points, which will show a completely new direction of development? Will, after a temporal disturbing of balance, it be possible to achieve a higher level development, discarding the intermediate ones?

A non-linear quality of regional development shows that the future of Poland's eastern borderlands may as well be optimistic, that is the regional system may enter a completely new phase of development and change its prop-

⁷ Rykiel Z., *Globalizacja, unioizacja i regionalizacja polskiej przestrzeni*, Studia Regionalne i Lokalne, Wydawnictwo Naukowe Scholar, Nr 1 (1)/2000, p. 4041.

⁸ Gorzelak G., Jałowiecki B., *Europejskie granice: Jedność czy podziały kontyentu?*, Studia Regionalne i Lokalne, Wydawnictwo Naukowe Scholar, Nr 2-3 (6)/2001, p. 53.

erties and directions of development. It means that it is possible to go beyond the XIX century and enter the XXI century. The authors mentioned before write that if globalisation, competition and innovation will determine development in the world, than discrepancies in Europe will intensify. Obviously, it results from non-linearity of regional development mentioned before. Equalisation of the level of development does not necessarily mean that strong regions stooped developing and are waiting for those developing. If Poland's eastern borderlands does not meet the challenge of ever-growing competition, than its role will be reduced to supplying unprocessed material resources and goods, the value of the relatively unspoilt and clean environment and worse qualified workforce.⁹

It seems, however, that this pessimistic scenario does not refer to the whole area of Poland's eastern borderlands. The tendency of urban development shows that some strong regional capitals will increase in importance in the future, especially those in which educational and research institutions, innovative firms and scientific and technical institutions will be operating. This will bring visible results of a marked concentration of specialised staff in big cities. Innovation and competitiveness of a region can only be generated by metropolis. Białystok, Lublin and Rzeszów may miss this course of development mainly due to visible weaknesses of major cities of Poland's eastern borderlands. Development trends based on knowledge will result in the development of cities of European importance, the so called "europolis". Unfortunately, the capitals of regions of Poland's eastern borderlands are not European development edges, although Białystok and Lublin are included into the group of potential europolis in a few planning schemes, mainly due to lobbyists' efforts. Competition between strong capital of European region will intensify mainly because of a free transfer of new technologies and some weaker capitals of the eastern borderlands will not withstand it

Yet, this picture of the future may as well mean that in Europe there appeared new cities and regions which offer good and skilled workforce, new areas to start new business, even though they are poorly developed but with a reasonably clean natural environment. This clean and unspoilt nature may prove to be a stimulating factor, attracting high technology, which avoid crowded European metropolis. Regions of the eastern borderlands may, thus, became an attractive location, especially to innovative firms employing specialised, qualified and well-paid staff. This will generate the need for new services, accommodation and housing estates as well as recreation places.

Well-educated and qualified staff plays a crucial role in all future scenarios. These are people who are able to use various resources of the region. Specialised staff can also take opportunities and prevent any threats in the

⁹ *Ibidem*, p. 68.

voivods. Therefore, in the future, it is essential to seek superiority of competition not in material resources but rather in the spatial distribution of human resources and the ability of the regions to attract or educate qualified staff. It means that "in the future, human knowledge and an immaterial factor will determine the position of the region in the regional distribution of work".¹⁰

The scenario of the intensification of development refers mainly to major cities of the region, the ones that may increase in importance in the so called high level of economy. The rest of the areas, especially rural ones will only have to take the place of a low level of economy with a high output of agricultural goods. It means that discrepancies in development of cities and villages will intensify. The solution will not be found in seeking new sources of maintenance outside agriculture. Thus, many people will migrate to towns and cities. Huge rural areas of eastern borderlands will depopulate. The onset of these processes can be seen even today, especially in Nadburzański region. However, those places have a chance of becoming recreation and tourist ecological centres.

In modern economy, as A. Kukliński¹¹ states „the process of depopulation of rural areas is very complex. Transformations of those areas in the EU countries is very slow and is artificially postponed by *sui generis* political terrorism of well-organised and brutal force groups which were able to extort capitulation behaviours from the European Union as far as common agricultural policy” The scenario by prof. Kukliński is the following „the XXI century must bring proper solutions to this problem, especially by diminishing production functions of rural areas and strengthening their role in creating European ecological landscapes. The level of knowledge, imagination and political will is still very low, and the lure of political terrorism still mighty.”¹²

Despite all probabilities, the scenario of the EU withdrawal from financing agriculture an increase of open spaces in creating of European landscape may prove to be beneficial. The regions of the eastern borderlands have much to offer. It is the valley of the river Bug, Bieszczady mountaint, Roztocze, Łęcząsko-Włodawskie lake district or Białowieża National Park. Natural properties and charm of other regions is also good enough for them to create, on the basis of unique properties of the environment, their own competitive tourist strategies. The percentage of protected areas of the whole area of the voivodship may be the proof of a very high standard of natural resources of Poland's eastern

¹⁰ Markowski T., Marszał T., *Konkurencyjność regionów jako element polityki przestrzennej*, w: Marszał T., Opałło M., (red.), *Współczesne problemy rozwoju regionalnego*, Bulletin PAN KPZK, issue 180, Warszawa 1998, p. 135.

¹¹ A. Kukliński, *Transformacja przestrzeni europejskiej (discursive article)*, *Studia Regionalne i Lokalne*, Wydawnictwo Nukowe Scholar, Nr 1(1)/2000, s. 26.

¹² *Ibidem*, p. 27.

borderlands.¹³ It turns out that this feature of Polish regions is a de-stimulation of competition. We may notice a very high percentage of valuable natural regions in voivodships with the highest development rate. In practice, it means that the higher the percentage of protected areas in the whole area of the voivodships, the lower the level of development of these areas. Going further, it means that the voivodships still have not been able to use these natural properties and resources to increase their competitiveness.

The idea of forming a common European market is a very important aspect of creating future scenarios after Polish integration into the European Union. Common market will enable free transfer of goods, money, new technologies and people. A new European area will guarantee quick and continual economic development, reduction of unemployment, an increase in innovation and competitiveness of the European economy. Permanent integration into such a European economic system is possible for Poland's eastern borderlands only if the funds which will be granted for these areas will not be speculative. However, we assume that the scenario of a triumph of common market and market economy proves to be optimistic enough and that all European countries will withdraw from economy life. All national and communal companies in Poland's eastern borderlands were privatised and many public tasks are handled by commercial firms. Obviously, this means reduction in the number of public sectors employees. Yet, owing to a good state of economy it does not mean that they will be unemployed.

In the future, the concept of protective authority will finally disappear. It does not mean that all social disproportions will be eliminated, but owing to a good state of economy, the life of the poorest people will be satisfying enough and mass public protests will not be organised. Yet, there will arise a problem of a large number of people who in the period before integration chose to retire mainly because of the possibility of losing their job or favourable conditions of retirement. Negative consequences of these decisions will intensify because of the society aging and an increase in life expectancy. This problem is indicated by current social protests in France aiming at protecting the retired and a former retirement system. Owing to a quick and stable economic development, a low rate of unemployment and relatively high salaries there will be a radical change in the system of public finances, insurance, education and health system. Everyone at productive age will be responsible for their present and future life, education and health. At the same time the development of an informative society will develop new aspirations and needs for improving education and information.

¹³ The percentage is: podkarpacki region – 47.6%, podlaskie region – 31.9%, lubelskie region – 22.7%.

An intensive development of economy will create new threats to the natural environment, not only because of the development of transportation but also industrial and agricultural waste. Therefore, those regions which particularly protect their natural environment will be granted financial support. Poland's eastern borderlands will obviously use this help, and will exclude many agricultural areas and afforest them.

An intensification in transportation of goods and people's movement will increase owing to a quick development of market economy, although modern economy based on knowledge and information is not transport-absorbing. Intensified traffic of goods and people will result in inaptitude of existing transportation routes. The lack of motorways and highways will still be the main problem of the eastern borderlands. Thus, new, alternative means of transporting goods are being sought. Railway transportation is becoming to be used once again. Metallurgical- Broad Railway lines will be used in trade with Russia. This will lead to stimulation of regions along this way of trading. Yet, a completely different scenario is also possible. Border location of podlaskie, podkarpackie and lubelskie voivodships would not be important if Russia and other countries of the UIC would remain outside the main course of European economy. Z. Rykiel¹⁴ presents a totally different scenario, that is „Poland's eastern borderlands economic state may deteriorate, especially in case of efficient market changes east of Polish borders.”

Internal and external security of the EU is besides common market and the equalisation of development is the priority of the European Union. Once Poland becomes a member of the EU, it will take responsibility for security of the most susceptible part of the external border of the EU, located in the area of the eastern borderlands. Sealing of the external border of the EU against illegal migration from Asian countries will increase the number of employees in the Border Guard. Despite any attempts to seal the border illegal immigration will increase. The smuggling of people will change its nature, from a transitional to a direct one, especially into the eastern borderlands of the EU. Still, these will not be illegal immigrants who will threaten our internal security but rather a very well organised international delinquency. Free trade will be accompanied by illegal smuggling not only of people, goods but also weapons and drugs through the eastern border to eastern regions. Inspections of illegal foreigners will be conducted more often, especially in the border area, in border bases, borders markets and access roads to the terminals. Terrorism will also endanger Europe. This scenario assumes a better military and political integration on European level. European quick reaction forces quartering in Poland's

¹⁴ Rykiel Z., *Globalizacja, unifikacja i regionalizacja polskiej przestrzeni*, Studia Regionalne i Lokalne, Wydawnictwo Naukowe Scholar, Nr 1 (1)/2000, p 41.

eastern borderlands will be created to fight terrorism and to improve external security.

The future of Poland's eastern borderlands is also determined by the model of cooperation with Eastern European countries, and especially Russia, the Ukraine and Byelorussia. The target model of cooperation may not be based on a simple trading exchange. Such a cooperation does not stimulate technological progress. Investing Polish capital in the economy of those countries will be very important. However, this model will depend on the level of openness of the European Union to Eastern countries. There is a danger that those countries will remain outside the main stream of European economy. This means poorer chances for Polish borderlands and an increase in social tension in neighbouring countries. It is more likely that those countries will be included in European economy to the benefit of the eastern borderlands. It seems that border cooperation on the local self-governments level and in the NGOs will be stimulated.

Unfavourable course of many events may also result from the fact that those in power do not take up challenges on European level. That is why, many regions will minimally use possibilities of support from European structural funds. After a period of pretended activity in being in authority, numerous scandals involving politicians, society will become discouraged to vote for people currently engaged in political life. Therefore, a new quality must emerge in politics. A new political class, also on the level of self-governments, will be appointed from the group of successful businessmen and people of engaged in social life, who will reasonably use the money of the taxpayers. The number of scandals so typical of current times will decrease. However, we will witness a crisis of elections to different representative bodies. Lobbying of various strong social groups in a very diverse European society will discourage from collective voting. People will put their trust only in local communities. Associations and NGOs in which social activity will focus will be thriving. In this way, the idea of civic society will be operating. This will mean a new social organisation, styles of social behaviour and the development of citizens' initiative as well as NGOs.

Summary notes

It may seem that any organisation as an orderly system of interdependence makes it possible to predict precisely the performance of this system. However, there exist such determining systems whose future is difficult to be predicted. This problem especially refers to regions. The difficulty in creating future scenarios for Poland's eastern borderlands result:

- first of all, from a new quality of the area of regions after Polish integration into the EU,
- secondly, from many global conditions, which are difficult to be predicted,

- thirdly, form a non-linear mechanism of connection between different components creating regional systems and multidimensional systems of connections between a given region and European and worldwide economy

Generally, we tend to accept the scenario of market economy in which common market will enable free transfer of goods, money and people. It leads to the tightening of economic relations between Polish and European firms and better security for the investors. There will be a new chance for an increase in the effectiveness of managing and thus competitiveness. However, in the first phase, the development of instability of the whole regional system may be the main consequence of the EU extension for Poland's eastern borderlands. Only after creating new structures will it mean entering new development routs.

A common model of European market economy, common currency will be operating, however, differences in the level of development of Poland's eastern borderlands in comparison to other European regions will still be visible. This will result from adaptation difficulties of economic bodies but also from all the costs connected with this adaptation. The poorer the level of institutional adaptation and the standardization in many spheres of life, the higher the costs. Bankruptcy of not adapted firms and even a temporary increase in unemployment may be the immediate results. Liquidation of old-fashioned forms of management, getting rid of peripheral European development, stimulating economic development and a relative increase in the standard of life of the inhabitants of Poland's eastern borderlands will all be the main benefits.

It is certain that the future of Poland's eastern borderlands will include positive and negative components. Therefore, the variety of scenarios of development results from possible ways of reacting to changes generated by European integration. New global phenomena are uncertain and so are reactions of the regions to changes resulting from a non-linear connections between regional systems, which usually leads to chaotic behaviour. Non-linear dynamics of changes may as well lead to future regress or sudden progress. Thus, the variety of scenarios results from a big susceptibility to changes, which usually generates many different directions of regional development. Any change disturbs the balance of any system, but in non-linear systems the way towards recovering balance may be difficult and unpredictable.

In the future development, any assistance provided by European and national authorities as well as self-government initiatives will be as important as external conditions and economic mechanisms. Still, the future is also directly dependent on the inhabitants and the activity of local self-governments facilitating non-linear mechanisms of combining conditions determining development. The following aspects will play a key role in generating such mechanisms which will accelerate development and stimulate development paths:

- knowledge and competence of regional self-governments,
- development of regional information networks,

- strengthening regional relations with worldwide economy,
- creating integrated communication networks and a system of terminals on borders,
- protecting cultural heritage as a component strengthening regional competitiveness,
- strengthening the role of education and generating modern technology and supporting innovative ideas,
- methods of spatial diffusion of innovations,
- the level of urbanisation of the region and a changing role of regional capitals,
- benefits resulting from the range of urbanisation of the region and the potency of other development areas,
- development of a civil and informative society,
- an integrated system of regional marketing for investors, tourists and inhabitants interested in possibilities of settling down in the region,
- most important people or key institutions facilitating development.

Therefore, the regions which have many possibilities of development in the future are those which are able to create spatial circumstances of development, generate modern technologies and attract investors as well as those which have a well-developed system of settlement possibilities with a strong centre, have a good access to the system of transportation into housing estates and investment areas and are able to manage human resources efficiently and use natural resources in a rational way. Poland's eastern borderlands has a chance to become such a region.

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Streszczenie

SCENARIUSZE PRZYSZŁOŚCI WSCHODNIEGO POGRANICZA POLSKI

Scenariusze przyszłości wschodniego pogranicza Polski wiążą się z procesami integracji europejskiej. Wiele scenariuszy przyszłości jest prawdopodobnych, ale pewne jest że:

- obraz przyszłości nowych obszarów jak i całej Europy będzie inny niż teraźniejszość,
- zakres przekształceń obszarów wschodniego pogranicza Polski pójdzie drogą globalnego a nie indywidualnego rozwoju.

Należy podkreślić, że scenariusz jest pewną koncepcją przyszłości, która wynika z różnych proporcji dotychczasowych mechanizmów i tendencji rozwojowych oraz możliwych nowych zdarzeń i procesów, które mogą pojawić się w przyszłości. Ten intuicyjny model przyszłości jest zwykle alternatywnym układem wielokrotności dotychczasowych procesów i przewidywanych zmian. Scenariusz nie jest więc zwykłym opisem stanu przyszłości, ale logicznym ciągiem przyszłych zdarzeń, procesów i ścieżek rozwoju wynikających ze stopnia otwartości układu regionalnego i jego wrażliwości na zmiany wewnętrzne i zewnętrzne.

Generalnie przyjmujemy scenariusz gospodarki rynkowej, w którym wspólny rynek umożliwia swobodny przepływ towarów, usług, kapitału i osób. Powoduje to zaciśnięcie więzi gospodarczych między polskimi i europejskimi firmami oraz większe bezpieczeństwo dla inwestorów. Pojawia się szansa na wzrost efektywności gospodarowania a tym samym na poprawę konkurencyjności. Jednak konsekwencją rozszerzenia UE dla obszarów wschodniego pogranicza Polski może być w pierwszej fazie rozwoju niestabilność całego układu regionalnego, a dopiero po okresie samoorganizacji nowych struktur wejście na nowe trajektorie rozwoju.

Wydaje się jednak, że niezależnie od przyjętego scenariusza przyszłości, mimo wcielania w życie idei jednolitego rynku europejskiego, wspólnej waluty oraz polityki wyrównywania poziomu rozwoju, istniejące obecnie dystanse rozwoju wschodniego pogranicza Polski pozostaną jeszcze na wiele lat. Należy o tym pamiętać formułując różne scenariusze dla tego obszaru.

STRUCTURE OF SOCIO-ECONOMIC SPACE IN PROVINCES OF POLISH-UKRAINIAN BORDERLANDS

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The process of socio-economic and cultural integration of the European space, intensifying in the post-war period, has extended in the past and will extend in the future upon newer and newer countries. This leads to formation of a new, supranational socio-economic structure that will develop as a third world pole of growth, beside the American and Japanese economies. Acceleration of the process requires undertaking purposeful actions in favour of economic development and levelling of disproportion in development of individual countries and regions. Along with levelling of the existing disproportion, stabilization of political stages and implementation of proper legal instruments, subsequent countries have been and will be included into the socio-economic and political structures of the European Union. Now the process concerns new member-states, including Poland, but it must be assumed that in the next years it will also cover the remaining countries of Eastern Europe, including Ukraine. For the gradual acceleration of the process an important role in this respect is played by diagnostic expertises, concerning differentiation of the socio-economic space in individual countries and transborder areas in the present and future members of the European community. Specification of some regularity in this respect is necessary to undertake rational actions in favour of launching and intensifying adaptive processes in individual countries to the formation tendencies concerning development and European co-operation.

Now the problems are acquiring a specific meaning, since so far the state borders between individual countries have sometimes constituted serious barriers concerning development of economic co-operation and levelling of disproportion in this respect between not only borderlands, but also between Poland

and Ukraine¹. In undertaking purposeful activities in favour of co-operation development between Poland and Ukraine a basic meaning has establishment of the similarity degree of regional systems, located on the both sides of the state border. We assume that depending on the level of their similarity, there appear specific conditions for formation of mutual economic links. In case of a substantial similarity degree of the units located on the both sides of the state border, we may conclude that there are similar conditions of economy and a similar development level. Differences between them, however, indicate differences in conditions affecting their previous and future development. Depending on the similarity degree of areas, it is possible to draw conclusions concerning specific directions of co-operation development between them. Beside social, economic and cultural conditions concerning co-operation of border regions, an important part is also played by political conditions and the historical past of the areas, which may be used as an element of co-operation development or creation of antagonistic feelings and making specific barriers for the co-operation development (Ziło 1993).

In the light of the presented premises the purpose of this dissertation is an analysis of the differentiation degree of the socio-economic space in provinces (voivodeships in Poland – Podkarpackie and Lubelskie, and oblasts in Ukraine - of Lviv and of Lutsk) of the Polish-Ukrainian borderlands. In selection of features the Authors have tried to consider only those that are comparable for both countries². The accepted variables refer to various aspects of life: the level of the demographic concentration (density of population, natural growth, migration balance, economic burden of population at the production age (population at the production age per 1,000 inhabitants), urbanisation level (share of urban population in districts (Polish *powiaty* and Ukrainian *rayoni*), health protection (hospital beds and medical doctors per 10,000 inhabitants), agricultural economic base (share in the total area of individual districts, cattle and pigs per 100 ha of arable lands), fitting with social infrastructure (average used surface of lodgings in sq. m) and advancement level of transformation processes in economy (number of businesses in the private sector per 1,000 inhabitants, number of the registered unemployed per 1,000 inhabitants).

The total area of the four provinces is 85,000 sq. km, and the area shares of Polish (50.6%) and Ukrainian (49.4%) provinces are similar. In the years 1990-1998 the number of inhabitants in this area was maintained at a similar

¹ This work is a continuation of the research on the development level in border districts (*powiaty*) in Poland and Slovakia (Ziło, Woźniak, Polak 2001) and in Poland and Ukraine (Woźniak, Ziło 2002).

² The comparable material has been empirically elaborated by a team of workers of the Statistical Office in Lublin, under the direction of K. Tucki and included in the publication *Pogranicze polsko-ukraińskie w liczbach*. US, Lublin 1999.

level of 8.1 million and it slightly rose to 100.6%; although in the Polish area the dynamics was higher and amounted to 102.1%, whereas in the Ukrainian area it was lower and amounted to 98.9%. The individual provinces were characterised by higher differentiation of the demographical potential dynamics, and the latter ranged from 103.5% in the Podkarpackie Province to 98.7% in the Province of Lviv (Table 1). The number of births substantially dropped in that time from 124,900 to 89,000, i.e. to 71.2%; that drop was greater in the Polish provinces - to 70.2% (in the Podkarpackie Province to 69.5%, and in the Lubelskie Province to 70.8%), than in the Ukrainian provinces, to 72.6% (in the Province of Volhynia - 77.1%, and in the Province of Lviv - 70.7%). On the other hand greater dynamics of deaths was in the Ukrainian provinces (111.1%), than in the Polish ones (97.3%).

The analysed area was characterised by a negative migration balance, which means that it was relatively unattractive for life of the population. In the years 1995-1998 in the Polish provinces the negative migration balance tended to reduce its value to 92.9%, chiefly due to the breakdown of labour markets outside agriculture in urban centres. In the Ukrainian provinces, however, the emigration process is much intensifying, and this is expressed by acceleration of the negative migration balance to 109.4%, and in the Province of Volhynia to as much as 126.9%. This means that the areas of the analysed provinces provide different conditions for formation of demographic processes. The Polish provinces are characterised by a demographic growth, whereas there is a drop of population in the Ukrainian provinces. The latter are characterised by a greater demographic vitality and increasing tendencies to the negative migration balance, whereas the reverse tendencies take place in the Polish provinces.

The areas of the borderland provinces are also characterised by substantial differentiation concerning selected economic factors. Out of the total employment level of 2.2 million workers, the dominant importance holds the Province of Lviv, focussing 40.9% of all employment, whereas the remaining provinces have similar shares from 19.1% to 20.2% of the working. More advanced processes of economic transformation in the Polish area have affected a substantial share of the Polish provinces concerning the number of businesses in the private sector and the unemployment rate. Share values of these features in the Polish provinces range from 30.1% to 35.1%, whereas in the Ukrainian provinces from 8.3% to 23.2%. On the one hand this is an expression of a greater economic activity of the Polish provinces and a greater breakdown of labour markets operating in their areas in the years of the centrally controlled economy. A substantial share of the unemployed indicates that development of individual economic activity proceeds much slower than economic activation of the individual sector. It seems that at intensification of restructuring processes of the Ukrainian economy some endeavours should be taken in favour

of some control of these complex processes in order to minimise negative social effects resulting from the breaking-down labour markets in the coming future.

Table 1. Differentiation of selected feature potential in borderland provinces of Poland and Ukraine

Features	Years	Total	Polish provinces			Ukrainian provinces		
			Total	Lubelskie	Podkarpackie	Total	of Lviv	of Volhynia
Area (in sq. km)	1998	85018	43041	25115	17926	41977	21834	20143
Population in thousands	1990	8082.6	4272.3	2221.9	2050.4	3810.3	2744.1	1066.2
	1998	8131.1	4361.7	2239.5	2122.2	3769.4	2708.3	1061.1
	dynamics	100.6	102.1	100.8	103.5	98.9	98.7	99.5
Births	1990	124920	69850	34442	35408	55070	38693	16377
	1998	89000	49008	24398	24610	39992	27373	12619
	dynamics	71.2	70.2	70.8	69.5	72.6	70.7	77.1
Deaths	1990	84482	43564	24168	19396	40918	28849	12069
	1998	87877	42401	24207	18194	45476	31434	14042
	dynamics	104.0	97.3	100.2	93.8	111.1	109.0	116.3
Migration balance	1995	-12636	-3974	-2502	-1472	-8662	-6620	-2042
	1998	-13172	-3693	-2261	-1432	-9479	-6887	-2592
	dynamics	104.2	92.9	90.4	97.3	109.4	104.0	126.9
Number of the working in thousands	1998	2201.9	864.4	419.6	444.8	1337.5	900.1	437.4
The unemployed in thousands	1998	388.6	266.4	117.1	149.3	122.2	90.1	32.1
Businesses in private sector in thousands	1998	346.5	238.9	121.6	117.3	107.6	75.0	32.6
Share per cent								
Area	1998	100.0	50.6	29.5	21.1	49.4	25.7	23.7
Population	1998	100.0	53.6	27.5	26.1	46.4	33.3	13.0
Births	1998	100.0	55.1	27.4	27.7	44.9	30.8	14.2
Deaths	1998	100.0	48.3	27.5	20.7	51.7	35.8	16.0
Migration balance	1998	100.0	28.0	17.2	10.9	72.0	52.3	19.7
The working	1998	100.0	39.3	19.1	20.2	60.7	40.9	19.9
The unemployed	1998	100.0	68.6	30.1	38.4	31.4	23.2	8.3
Businesses in private sector	1998	100.0	68.9	35.1	33.9	31.1	21.6	9.4

Source: *Pogranicze polsko-ukraińskie w liczbach*, US, Lublin 1999

Value differentiation of socio-economic features in the provinces of the Polish-Ukrainian borderlands

In order to define a similarity degree in the socio-economic development level in the borderland provinces of Poland and Ukraine, a multi-measure analysis of the differentiation degree of the socio-economic development in districts has been made. In the light of the accepted features it turns out that the socio-

economic space of the borderland provinces is characterised by substantial differentiation, which very clearly underlines difference in conditions and development possibilities of the Polish-Ukrainian borderlands. This is expressed by very big differences between the values of the analysed features, which are illustrated by: the arithmetic means, the standard deviation and oscillations of variability coefficients whose values range from 5.5% to 67.3% (Table 2). The most balanced development level in individual districts is illustrated by the lowest values, amounting to 20%, of variability coefficients for the analysed features. They are represented by: the population at the production age per 1,000 inhabitants (6.3%), the number of persons per one lodging (10.9%) and the average useable surface of lodgings (11.7%). This results from similar age structures of the population and the remnants of substantial lodging resources from the years of the centrally controlled economy system, when there were strict norms referring to the surface of lodgings and the number of family members.

The features specifying: the share of arable lands in the total area (24.2%), and the cattle per 1,000 ha (24.9%) have a moderate level of differentiation (at the variability coefficients from 20% to 40%). This indicates some degree of similarity of natural environment conditions in the analysed area for agriculture.

The remaining features indicate substantial differentiation of the development level in the analysed area. Substantial differentiation of districts (variability coefficients from 40% to 60%) is reflected in the level of urbanisation (45.4%), unemployment, construction traffic, numbers of businesses and fitting in infrastructure of health protection.

The highest differentiation (over 100%) appears with features expressing the level of the population concentration (density of population), natural growth and migration. This stresses clear disproportion concerning distribution of the demographic potential, and ensuing various degrees of space attractiveness of borderland provinces for the population life.

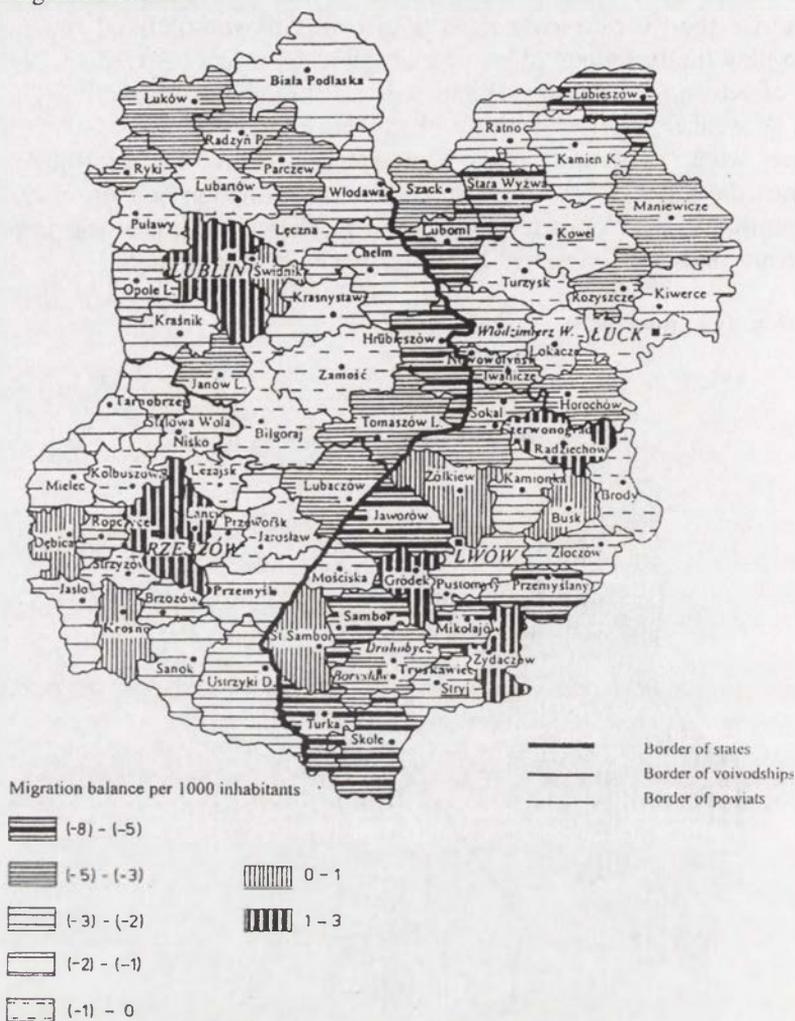
Based on values of variability coefficients referring to the Polish and Ukrainian districts, it turns out that their analysed features are characterised by various, changeable similarity degrees (Table 3). Concerning density of population there is much greater differentiation in the Ukrainian districts, whose variability coefficients are 132.8% (the Province of Lviv) and 102.9% (the Province of Lutsk), whereas in the Polish provinces they are 59.8% (the Lubelskie) and 39.6% (the Podkarpackie). The common regularity in the area is a distinguishable substantial concentration of the population in the provincial capitals, which, nevertheless, have formed areas of the demographic concentration around them in an uneven way (Fig. 1). In the spatial system of the Podkarpackie Province the greatest zone of the population concentration lies along the boundary with the Małopolskie and the Świętokrzyskie Provinces; similarly, in the Lubelskie

Province the greatest concentration of the population is along its western boundary. If we move eastwards to the Ukrainian border, the density of the population visibly weakens. This is connected with agricultural and silvicultural areas that allow a concentration of the population to a lesser extent. An exception here is the former transport route via Jarosław and Przemyśl, where we have a greater density of the population. In the Province of Lviv a substantial concentration of the population is visible from Lviv to Striy, and refers to the former economic activity of the area. There is a substantial concentration of the population in the northern part of the province, what is connected with intensive industrialisation of the area in the post-war period and a rise of big industrial towns. The lowest indices of the population density characterise districts of the Province of Volhynia, traditionally unattractive for the population. Generally, it may be said that the borderland districts are as a rule less attractive for the demographic concentration, what is connected with a peripheral character of the areas in relation to the regional centres. It is possible then to assume that the political border also consolidates here the economic and social border that may be a serious barrier for the future integration processes of Ukraine with structures of the European Union. That is why state and regional authorities should undertake activities to limit here intensification of processes that lead to peripheral character of the areas.

Migration processes also stress the peripheral character of borderland districts, where we observe the lowest values of the negative migration balance (Fig. 2). They result from unattractiveness of the areas for the population life, what makes the most entrepreneurial and usually the best-educated individuals emigrate from them to the areas that develop economically in a more intensive way. A positive migration balance characterises the provincial centres (Lviv, Lublin, Rzeszów) and two districts of the Podkarpackie Province and the Province of Lviv. Generally, it is possible to assume that the areas of borderland provinces are marked by emigration of the population, what is a result of a more general process of intensification of the peripheral character of the regions in the eastern borderlands of Poland (Kudełko, Woźniak, Ziło 2001, Kudełko, Ziło 2001, Stasiak, Horodeński, Sadowska-Snarska 2001).

The analysed area is characterised by high differentiation in development of entrepreneurship, expressed by the index – businesses in the private sector per 1,000 inhabitants whose value ranges from 75.9 in the City and District of Lublin to 7.4 in the District of Shatsk (Table 4). The most differentiated concerning the value of this feature is the Province of Volhynia whose value of the variability coefficient is 75.8% and then the Province of Lviv (40.3); the districts of the Podkarpackie (25.9%) and the Lubelskie (23.5) Provinces, however, are characterised by a much smaller variability. In the spatial system it is the territory of the Podkarpackie Province that is visibly distinguished and its districts are characterised by the highest level of social entrepreneurship

Fig. 2. Migration balance



The features, presented as examples, indicate that concerning natural features and features connected with rules of the central management system there is a great similarity of regional structures. Features defining the level of advancement of the economy restructuring processes decidedly differentiate them. The processes should be diligently observed by the Ukrainian side in order to avoid their negative economic and social results in the next years when the processes intensify.

Fig. 3. Businesses in private sector

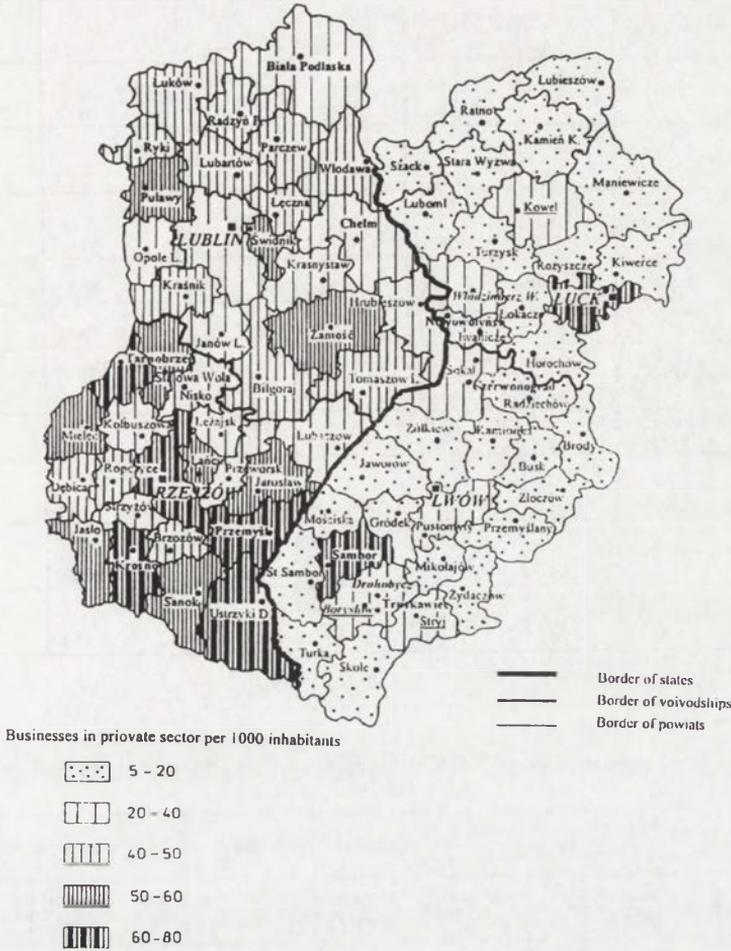


Table 2. Differentiation of feature values in districts of the borderland provinces of Poland and Ukraine (the Lubelskie Province, the Podkarpackie Province, the Province of Lviv and the Province of Lutsk) in 1998.

Features	Average	Standard deviation	Variability coefficient	Asymmetry	Maximum	Minimum
Density of population	101.5	101.4	100.0	5.1	832.3	24.1
Share of arable lands	59.1	14.3	24.2	-0.7	82.7	21.0
Share of urban population	37.7	17.1	45.4	0.9	89.8	6.2
Natural growth per 1,000 inhabitants	0.4	3.5	786.1	0.2	12.4	-6.9

Table 2.

Migration balance per 1,000 inhabitants	-2.2	2.3	-103.5	-0.3	2.9	-8.0
Population at production age per 1,000 inhabitants	547.6	34.4	6.3	-0.2	617.0	475.6
Businesses in private sector per 1,000 inhabitants	32.8	18.4	56.1	0.4	75.9	7.4
The registered unemployed per 1,000 inhabitants	51.5	22.6	44.0	0.2	104.5	11.3
Cattle per 100 ha of arable lands	43.9	10.9	24.9	2.5	107.0	25.0
Pigs per 100 ha of arable lands	55.0	28.7	52.2	0.9	127.0	10.0
Average usable area of lodgings in sq. m	62.0	7.2	11.7	-2.7	74.2	19.0
Number of persons per 1 lodging	3.4	0.4	10.9	-0.2	4.3	2.5
Number of lodgings put to use per 1,000 inhabitants	1.3	0.6	48.4	0.9	3.7	0.2
Hospital beds per 10,000 inhabitants	55.2	23.3	42.1	0.9	143.5	5.7
Medical doctors per 10,000 inhabitants	22.5	12.9	57.5	3.4	87.8	6.4

Source: Cf. Table 1.

Table 3. Degree of socio-economic differentiation of districts in borderland provinces of Poland and Ukraine

Features	Average				Standard deviations				Variability coefficients			
	Lubel-skie	Podkar-packie	Prov. of Lviv	Prov. of Lutsk	Lubel-skie	Podkar-packie	Prov. of Lviv	Prov. of Lutsk	Lubel-skie	Podkar-packie	Prov. of Lviv	Prov. of Lutsk
Density of population	86.3	126.0	126.3	58.9	51.6	49.9	167.6	60.6	59.8	39.6	132.8	102.9
Share of arable lands	68.8	55.9	54.4	56.7	8.4	12.4	13.5	17.4	12.2	22.2	24.8	30.7
Share of urban population	34.8	36.6	41.5	38.1	14.7	14.2	17.8	21.0	42.3	38.8	43.0	55.2
Natural growth per 1,000 inhabitants	0.0	3.2	-0.8	-0.9	1.6	1.0	3.9	4.5	7077.4	31.0	-461.7	-529.0
Migration balance per 1,000 inhabitants	-2.2	-1.2	-2.5	-3.3	1.9	1.4	3.0	2.0	-89.2	-120.9	-122.1	-60.6
Population at production age per 1,000 inhabitants	562.9	572.2	531.2	518.2	21.7	16.8	33.9	31.5	3.9	2.9	6.4	6.1
Businesses in private sector per 1,000 inhabitants	43.8	49.7	17.6	17.2	10.3	12.9	7.1	13.0	23.5	25.9	40.3	75.8

Table 3.

The registered unemployed per 1,000 inhabitants	57.5	76.2	39.1	28.5	11.1	15.3	15.1	13.3	19.4	20.0	38.5	46.7
Cattle per 100 ha of arable lands	37.4	43.8	51.0	43.4	6.3	8.0	14.5	7.6	16.9	18.3	28.4	17.6
Pigs per 100 ha of arable lands	80.5	56.1	32.8	49.7	24.9	29.6	19.8	10.0	31.0	52.8	60.4	20.1
Average usable area of lodgings in sq. m	64.5	67.3	56.5	59.2	3.5	3.8	9.4	3.7	5.5	5.7	16.7	6.3
Number of persons per 1 lodging	3.4	3.8	3.1	3.5	0.2	0.2	0.3	0.3	5.8	4.1	10.2	9.3
Number of lodgings put to use per 1,000 inhabitants	1.5	1.3	1.1	1.1	0.8	0.5	0.5	0.5	54.4	34.5	46.3	42.4
Hospital beds per 10,000 inhabitants	47.2	40.7	76.2	57.3	22.9	12.8	22.5	13.4	48.7	31.5	29.5	23.4
Medical doctors per 10,000 inhabitants	19.2	15.3	31.1	24.8	7.5	4.6	19.7	6.0	39.0	29.9	63.5	24.1

Source: Cf. Table 1.

Table 4. Differentiation of feature values of districts in borderland provinces of Poland and Ukraine

Features	Maximum				Minimum			
	Lubelskie	Podkarpackie	Prov. of Lviv	Prov. of Lutsk	Lubelskie	Podkarpackie	Prov. of Lviv	Prov. of Lutsk
Density of population	269.0	257.7	832.3	266.3	34.1	25.6	34.4	24.1
Share of arable lands	82.7	68.4	74.9	81.7	49.4	21.3	21.0	30.4
Share of urban population	75.1	62.3	89.8	82.8	6.2	12.0	17.5	14.6
Natural growth per 1,000 inhabitants	3.4	4.9	12.4	8.5	-4.8	1.4	-6.0	-6.9
Migration balance per 1,000 inhabitants	1.6	1.6	2.9	-0.2	-6.8	-4.9	-8.0	-6.7
Population at production age per 1,000 inhabitants	617.0	611.1	612.6	604.9	533.9	550.8	480.7	475.6
Businesses in private sector per 1,000 inhabitants	75.9	74.1	37.8	60.8	28.8	31.0	9.2	7.4
The registered unemployed per 1,000 inhabitants	81.3	104.5	83.8	51.6	35.0	47.3	19.3	11.3
Cattle per 100 ha of arable lands	49.0	60.0	107.0	59.0	25.0	28.0	36.0	31.0
Pigs per 100 ha of arable lands	126.0	127.0	107.0	64.0	47.0	10.0	11.0	33.0
Average usable area of lodgings in sq. m	70.2	74.2	66.9	68.5	57.3	60.8	19.0	53.3
Number of persons per 1 lodging	3.7	4.1	3.6	4.3	3.0	3.5	2.5	3.1
Number of lodgings put to use per 1,000 inhabitants	3.7	2.3	2.3	1.9	0.2	0.5	0.3	0.2
Hospital beds per 10,000 inhabitants	91.3	59.3	143.5	92.8	5.9	5.7	56.6	48.2
Medical doctors per 10,000 inhabitants	44.3	26.9	87.8	37.8	6.4	8.9	14.8	17.3

Source: Cf. Table 1.

Value relations of features of socio-economic development

The analysed development features show little mutual relations. This conclusion is indicated by values of correlation coefficients, ranging from (-0.476), between the average usable area of lodgings and the number of medical doctors per 10,000 inhabitants, and (-0.422) between the number of hospital beds per 10,000 inhabitants and the average usable area of lodgings and the number of persons per one lodging, to 0.831 between the businesses per 1,000 inhabitants and the number of the population at the production age per 1,000 inhabitants (Tables 5 & 6). Based on relatively low values of correlation coefficients for the analysed variables, it is possible to conclude that the features of the socio-economic development of the Polish and Ukrainian districts do not show any mutual connection of the cause-result relationship. Out of 105 total relations in as many as 78 cases there was hardly any correlation between the analysed features, or it was very small, as the indices ranged from -0.3 to 0.3. Only 7 relations were characterised by low negative values of indices (from -0.3 to -0.5), and 22 relations by low positive values (from 0.3 to 0.5). There were relatively few relations of higher values of correlation coefficients (over 0.50), and they included only 8 cases of positive correlation and 7 cases of negative correlation.

Substantial differentiation in this respect characterises the set of the Ukrainian and Polish districts. In the set of the Ukrainian districts there is a very small correlation or it does not exist (from -0.3 to 0.3) in as many as 73 cases, whereas in the set of the Polish districts in 56 cases. Similarly, higher values of correlation indices (over 0.5) characterise 5 negative relations and 20 positive relations in the Polish districts, whereas there are only 15 positive relations in the set of the Ukrainian districts.

We may observe greater differentiation in this respect among districts in the individual provinces. In the Province of Lviv there are no correlations featuring 73 relations, in the Province of Lutsk - 51 relations, in the Lubelskie Province - 50 relations, and in the Podkarpackie Province - 40 relations. This indicates a greater similarity concerning intensification of connections between the features of the neighbouring Lubelskie Province and Province of Lutsk, than between the Province of Lviv and the Podkarpackie Province that are also neighbours. Also a similar number of relations of higher values of correlation indices (over 0.5) characterises the Lubelskie Province - 26 and the Province of Lutsk - 23, whereas in the Podkarpackie Province and the Province of Lviv they appear only in 17 relations.

The hinted differentiation of connection intensification between the analysed features of the socio-economic development requires a thorough analysis in joint studies of authors from the Ukrainian and Polish sides. It should be noted, however, that in the individual provinces values of correlation indices be-

tween the same features are very different and sometimes that difference is substantial. This is indicated by values of correlation indices, calculated between the values of correlation indices for district features in the individual provinces (Table 7). The greatest similarity between the relations of the analysed features of the socio-economic development is between the relations characterising the Lubelskie and Podkarpackie Provinces, whose expression is the highest correlation index of -0.723 , whereas the relations of that type between the Provinces of Lviv and Lutsk are much smaller, whose expression is a lower value of the correlation coefficient of -0.422 . The highest differences in this respect, however, are between the relations characterising the Province of Lutsk and the Podkarpackie Province, whose value of the correlation index is the lowest and amounts to 0.284 . Precise understanding of these very complex problems seems to be very important, because they allow specifying intensification degree of mutual connections between the features representing specific fields of the socio-economic life.

Table 5. Matrix of feature correlations in districts of the borderland provinces of Poland and Lithuania

Features	Density of population	Share of arable lands	Share of urban population	Natural growth per 1,000 inhabitants	Migration balance per 1,000 inhabitants	Population at production age per 1,000 inhabitants	Businesses in private sector per 1,000 inhabitants	The registered unemployed per 1,000 inhabitants	Cattle per 100 ha of arable lands	Pigs per 100 ha of arable lands	Average usable area of lodgings in sq. m	Number of persons per 1 lodging	Number of lodgings put to use per 1,000 inhabitants	Hospital beds per 10,000 inhabitants	Medical doctors per 10,000 inhabitants
Density of population	1.0000														
Share of arable lands	0.1430	1.0000													
Share of urban population	0.6266	0.1150	1.0000												
Natural growth per 1,000 inhabitants	0.0966	-0.2660	0.0141	1.0000											
Migration balance per 1,000 inhabitants	0.2072	0.3314	0.1668	-0.1018	1.0000										
Population at production age per 1,000 inhabitants	0.5596	0.2253	0.5728	0.4192	0.3077	1.0000									
Businesses in private sector per 1,000 inhabitants	0.3554	0.2217	0.3455	0.3195	0.3904	0.8308	1.0000								
The registered unemployed per 1,000 inhabitants	-0.0303	0.0940	-0.1528	0.4372	0.0960	0.4650	0.5333	1.0000							
Cattle per 100 ha of arable lands	0.0672	-0.1610	0.0424	0.1758	-0.1972	-0.1637	-0.2315	-0.0610	1.0000						
Pigs per 100 ha of arable lands	-0.0341	0.2120	-0.0209	0.2283	-0.0396	0.2171	0.3204	0.0911	0.1094	1.0000					
Average usable area of lodgings in sq. m	-0.1392	0.0020	-0.3975	0.3603	0.2244	0.1061	0.2836	0.4418	-0.0642	0.3131	1.0000				
Number of persons per 1 lodging	-0.0193	-0.0904	-0.1421	0.3445	0.0460	0.2327	0.3400	0.4758	0.0436	0.2156	0.4384	1.0000			

Number of lodgings put to use per 1,000 inhabitants	0.2758	0.1934	0.3337	0.1865	0.2577	0.4173	0.4043	-0.0373	-0.0602	0.2000	-0.0364	-0.0108	1.0000		
Hospital beds per 10,000 inhabitants	0.3961	-0.1358	0.4035	-0.1462	-0.1592	-0.0526	-0.2254	-0.3024	0.2077	-0.2904	-0.4219	-0.4416	-0.0335	1.0000	
Medical doctors per 10,000 inhabitants	0.6532	-0.0087	0.6501	-0.2230	0.0030	0.1384	-0.0395	-0.3956	0.0942	-0.2572	-0.4760	-0.3120	0.0877	0.6933	1.0000

Source: Cf. Table 1.

Table 6. Relations between values of socio-economic development features in the districts of the borderland provinces of Poland and Ukraine

Values of correlation coefficients	Number of relations						
	Total	Poland	Ukraine	Lubelskie	Podkarpackie	Prov. of Lviv	Prov. of Lutsk
(-0.8) - (-0.7)				1	5		
(-0.7) - (-0.6)		2		3	2		1
(-0.6) - (-0.5)		3		2	8	1	4
(-0.5) - (-0.4)	3	5		6	3	5	5
(-0.4) - (-0.3)	4	4	7	9	10	1	3
(-0.3) - (-0.2)	6	10	10	4	7	16	7
(0.2) - (-0.1)	10	10	8	2	5	16	4
(-0.1) - 0	16	10	18	9	10	15	5
0 - 0.1	13	5	19	8	3	11	10
0.1 - 0.2	10	13	10	13	6	10	17
0.2 - 0.3	13	8	8	14	9	5	8
0.3 - 0.4	13	6	7	7	12	6	8
0.4 - 0.5	9	9	3	1	8	2	10
0.5 - 0.6	3	7	4	8	4	2	10
0.6 - 0.7	4	10	6	8	8	4	3
0.7 - 0.8		1	3	5	4	6	4
0.8 - 0.9	1	2	2	4	1	4	3
0.9 - 1.0				1		1	3
Total	105	105	105	105	105	105	105

Source: Cf. Table 1.

Table 7. Matrix of correlations between correlation coefficients of the analysed features in the provinces

Provinces	Districts of provinces			
	Lubelskie	Podkarpackie	of Lviv	of Lutsk
Lubelskie	1.000			
Podkarpackie	0.723	1.000		
of Lviv	0.579	0.398	1.000	
of Lutsk	0.517	0.284	0.422	1.000

Source: Cf. Table 1.

Classification according to the area type of the Polish-Ukrainian borderlands

Values of individual features characterising the level of the socio-economic development of the provinces in the Polish-Ukrainian borderlands, and relations between them affect a various degree of similarities between the districts. Assuming as a criterion the connection distance of the multi-feature grouping (as per Ward's method), the Authors have classified the units according to types to specify their degree of similarity concerning the accepted features (Fig. 4).

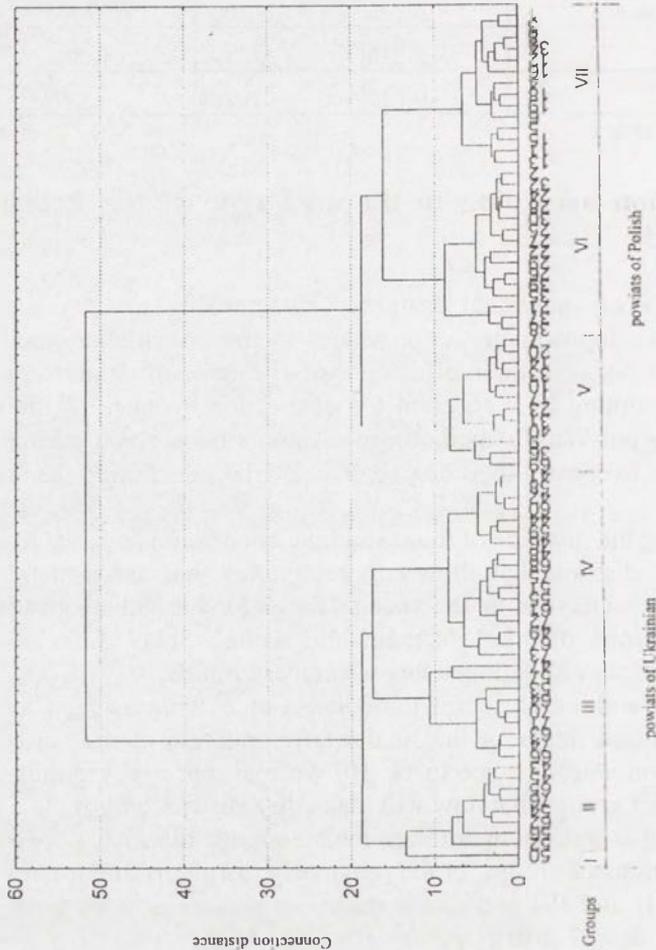
Taking the distance of the taxonomic connection as 5, we may distinguish 17 groups of districts that allow a more detailed analysis of their similarity degree and their location in the space (Table 8). Individual groups sometimes cover single units, the most distinguishing among others (e.g. Lviv- Postumy, Turka), and groups including a larger number of units.

Along with extension of the connection distance we get an increasingly more generalised image of the spatial differentiation of the borderlands. If we take the taxonomic distance to be 10, we may observe grouping of the most similar district groups that now will make up 8 district groups.

Taking as a division criterion the taxonomic distance 12, we may observe next connections of groups: of the previously distinguishing groups I and II, and the groups III and IV, and as the result we receive a more generalised image representing now 7 district groups (Fig. 5). At this level of generalisation the first four groups of the Ukrainian districts and three groups of the Polish districts are distinguishable very clearly. This evidences substantial differences concerning the level of the economic and social development, expressed by the accepted features. Ukrainian districts make up the first four groups. The most distinguishing units at this distance are Lviv with the District of Postumy and Striy, making up the first group. The second group covers a zone of border districts, extending from Borislav in the south to Volodimir in the north; the third

group is represented by southern districts (Turka, Skole), and a compact zone of northern districts (from Shatsk to Kivertsi); the fourth group covers 17 districts, making up a wide zone extending from Zhidachiv in the south to Staraya Vizhva in the north.

Fig. 4. Diagram of Polish and Ukrainian powiats. Ward's method.



The Polish districts make up the next groups. The fourth group covers districts connected with major economic centres located in the Lubelskie and Podkarpackie Provinces, where there are regional (Lublin, Rzeszów) and sub-regional centres of the socio-economic growth (Zamość, Przemyśl, Tarnobrzeg) and areas operationally connected with the regional centre of Lublin and the industrialised zone of western districts of the Podkarpackie Province. The sixth

zone is made up by southern districts and peripheral districts located on the boundary of the regions of Rzeszów and Lublin, and the seventh zone a compact belt of border and northern districts in the Lubelskie Province.

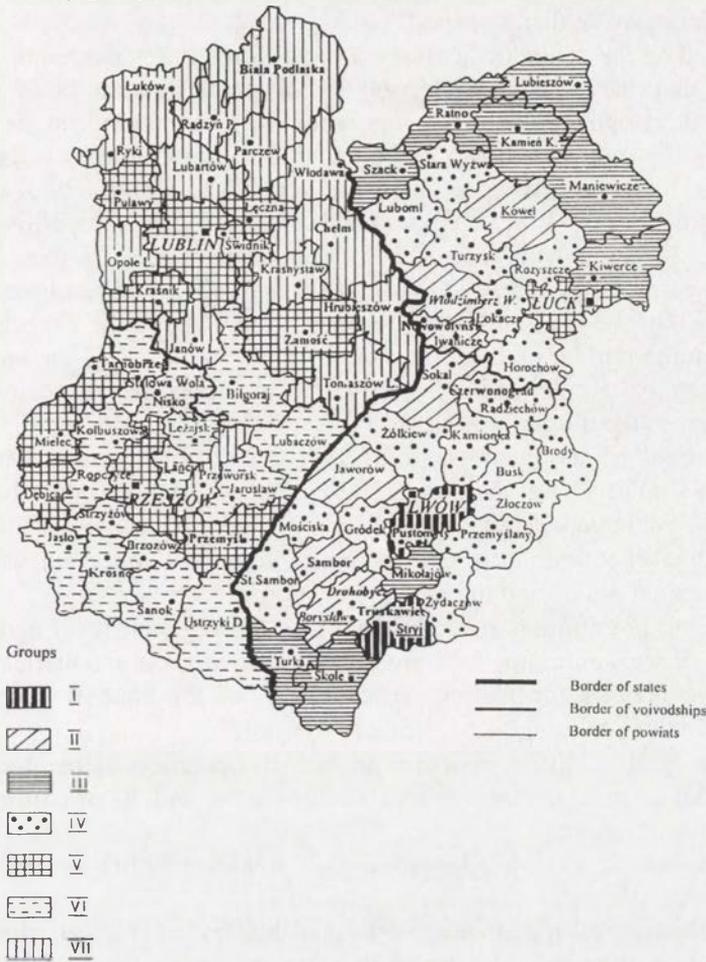
Table 8. Group polish and ukrainian powiats per Ward method

Number powiats in the fig. 4.	Powiats	Group are miteeting different connection distances						
		5	10	12	20			
50	Lwów-Pustomyty	I	I	I				
52	Sambor	II						
56	Stryj	III						
62	Iwanicze	IV				II		
54	Solak							
76	Włodzimierz Wołyński							
65	Kowel							
45	Jaworów							
43	Drohobycz							
66	Lubieszów	V	III			II	I	
74	Szack							
63	Kamień Koszyrski							
71	Ratno							
70	Maniewicze							
64	Kiwerce							
53	Skole							
57	Turka			VI	IV			
47	Mikołajów	VII						
73	Stara Wyzwa	VIII						
67	Lubomil							
49	Przemyślany							
72	Rożyszcze							
61	Horochów							
55	Stary Sambor							
51	Radziechów					IX	V	III
75	Turzysk							
68	Łokacze							
48	Mościska							
46	Kamionka n/Bugiem							
59	Zółkiew	X						
44	Gródek							
60	Żydaczów							
42	Busk							
58	Złoczów							

Table. 8.

41	Brody			
69	Łuck			
36	Rzeszów	XI		
9	Lublin			
40	Tarnobrzeg	XII		
31	Mielec			
23	Dębica			
17	Świdnik	XIII	VI	IV
10	Łęczna			
33	Przemyśl			
14	Puławy			
20	Zamość			
7	Kraśnik			
38	Stalowa Wola	XIV	VII	V
37	Sanok			
21	Bieszczadzki			
35	Ropczyce-Sędziszów	XV		
39	Strzyżów			
26	Kolbuszowa			
29	Lubaczów			
22	Brzozów			
27	Krosno			II
25	Jasło			
30	Łańcut			
28	Leżajsk			
24	Jarosław			
32	Nisko			
2	Biłgoraj			
13	Parczew	XVI	VIII	VI
11	Łuków			
15	Opole Lubelskie			
5	Janów Lubelski			
6	Krasnystaw	XVII		
19	Włodawa			
18	Tomaszów Lubelski			
4	Hrubieszów			
16	Ryki			
12	Opole Lubelskie			
34	Przeworsk			
8	Lubartów			
3	Chełm			
1	Biała Podlaska			

Fig. 5. Taksonomy group of Polish and Ukrainian powiats.



It may be assumed that relatively, the Polish and Ukrainian districts are marked by a similar degree of differentiation. The units that represent it are included in three groups. An exception is made by the first group, but it is connected with the agglomeration of Lviv, the largest in the area, whereas on the Polish side there is no such agglomeration. Nevertheless, it must be stressed that the analysed area is characterised by relatively substantial socio-economic separateness and types of districts located on the both sides of the border do not penetrate across it. The District of Lutsk, included into the fifth group, comprising more developed Polish districts, makes an exception here.

Only at the taxonomic distance of 20 two groups of the Polish and Ukrainian districts may be distinguished.

Based on the synthetic analysis of the differentiation degree of districts, it turns out that they are characterised by different conditions of the socio-economic development, hence co-operation between them can be based on complementary relations. It should be concluded that the districts can complement one another concerning exchange of services and products of supra-local and local importance. It must be assumed, however, that competitive relations will intensify, along with increase of financial resources of the community, chiefly concerning offers related to use of similar values and resources.

In face of the likely tendency to integration it should be expected that the area of Ukraine will be included into the Union's structures of the unifying Europe. It may be accelerated by, e.g. faster levelling of the socio-economic development in the border provinces.

It should be assumed generally that the socio-economic development of the area, similarly as of the Polish-Ukrainian borderlands should be executed by means of (Woźniak, Ziolo 2001, 2002):

- specifying economic development possibilities in connection with the national spatial policy and the national economic centres,
- specifying possibilities of co-operation at the regional level and acting in favour of weakening the existing political barriers and intensification of legislative actions for making development of the mutual economic co-operation and cultural exchange more dynamic,
- specifying possibilities of inclusion into co-operation of the local, supra-local and regional businesses and institutions, as well as of commercial exchange facilitation.

It should be stressed, however, that implementation of these actions requires nevertheless:

- comprehensive acquaintance with possibilities of further development of the areas of the neighbouring provinces, on the one hand paying attention to activation of economic growth factors, and on the other to minimising hampering barriers,
- specifying development ways for the provinces against the world and European growth process in order to facilitate inclusion of their economies into the process,
- preparation and acceptance of proper controlling instruments at the level of the communal, district and provincial government, with co-operation of the central government.

Non-fulfilment of the ideas will lead to intensification of the marginal position of the border districts, both on the Polish and Ukrainian side, and a concentration of the development around the regional centres (Lviv, Lublin, Rzeszów, Lutsk) and to deepening of the economic barrier along the political border

(Kudełko, Ziolo 2001). In such a situation a thesis by G. Gorzelak (1995) should be accepted; it says that the area is situated within the Central European eastern wall and in the future it will have more and more difficult conditions of development programme implementation, due to intensifying competitive relations, not only between the Polish or Ukrainian regions, but also between regions of the European countries. It seems that a further comprehensive analysis of the undertaken research problems will, to a much extent, allow improvement of the undertaken works at the national and regional levels, and they should be carried out in the convention of a development process with consideration of the intensifying globalisation.

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Streszczenie

ZRÓŻNICOWANIE POWIATÓW I REJONÓW POGRANICZNYCH POLSKI I UKRAINY

Podstawowe znaczenie w zakresie podejmowanie współpracy transgranicznej ma określenie stopnia podobieństwa oraz różnic w zakresie rozwoju społeczno-gospodarczego i kulturowego jednostek administracyjnych przylegających do siebie po obu stronach granicy. W nawiązaniu do tej tezy w pracy przedstawiono wyniki analizy dotyczące stopnia podobieństwa powiatów i rejonów przylegających do granicy polsko-ukraińskiej w świetle cech odnoszących się do: stopnia koncentracji demograficznej, poziomu urbanizacji, rolniczej bazy ekonomicznej, wyposażenia w zakresie infrastruktury społecznej oraz stopnia zaawansowania procesów restrukturyzacji gospodarki. W końcowej części pracy dokonano wielocechowego grupowania powiatów i rejonów. Stwierdzono znaczą odmienność uwarunkowań rozwoju społeczno-gospodarczego po obu stronach granicy oraz nakreślono konieczne działania na rzecz jego zintensyfikowania wykorzystując ideę komplementarnego rozwoju.

PART III

***CENTRAL AND EASTERN EUROPE
IN THE FACE OF EUROPEAN INTEGRATION
PROCESSES***

WARTYK
CENTRAL AND EASTERN EUROPE
IN THE FACE OF ECONOMIC TRANSFORMATION
FRANK R. LEE

ENVIROMENTAL MATTERS IN THE LEGAL ASPECT TO THE EU'S SPATIAL PLANNING AND ITS EASTERN EUROPEAN DIMENSION

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Introduction

One of the current priorities of spatial policy in EU member states is the proper management (i.e. management compliant with the assumptions of sustainable and harmonious development) of the geographical environment, where the latter is understood as a system of mutually-interactive abiotic, biotic, socio-economic and cultural elements (see EU Strategy for Sustainable Development, 2001). Elements of this geographical environment are characterised by a certain order which humankind imposes upon reality, with a view to it being possible for people to recognise and shape this reality (Domański, 2002, Degórski in press). Activity of the latter kinds is subjective in nature, and is subordinated to certain assumptions that are taken on board whenever theoretical models for the physical development of given areas are devised. The results of long-term studies presented in the form of empirical models are taken account of in planning studies, even if these are conditioned by social, economic and cultural factors. The experience gained in the running of the aforementioned long-term studies also then allows for the establishment of legal bases, and these form the legislative fabric upon which planning procedures and solutions are founded.

In EU member states, the general principles under which geographical space may be shaped and managed were devised more than 30 years ago and are included, *inter alia*, in several fundamental documents. The Council of Europe's Pan-European Strategy for Biodiversity and Landscape Conservation (1995) and European Landscape Convention (Florence, 2000) are among these, as are the European Union's European Spatial Development Perspective (ESDP) (1999) and Sustainable Development Strategy (2001). In addition, EU member states have come together with others in drawing up a series of detailed documents to regulate provisions in such specific fields as the near-border areas

(the CoE's European Outline Convention on Transfrontier Cooperation, Madrid 1980) or matters associated with the conservation of nature and natural habitats (the 1979 Berne Convention). Within the EU there is also the "Habitats Directive" (Council Directive 92/43/EEC of 21st May 1992 on the Conservation of Natural Habitats and of Wild Flora and Fauna).

The aim of the present article is thus to present the main directions to activity linked with environmental subject matter in spatial planning, as well as the EU procedures in force in this sphere, in line with solutions adopted in the Union's documents. Particular attention is paid to the degree of accord between the formal and legal solutions adopted in environmental management on the one hand, and both EU legislation and the development strategies devised for particular regions of our continent (including East-Central Europe), on the other. The latter strategies take account of the specifics of each region, and take care to present ways in which these might be retained, *inter alia* through a strengthening of identity via maintenance of natural and cultural diversity.

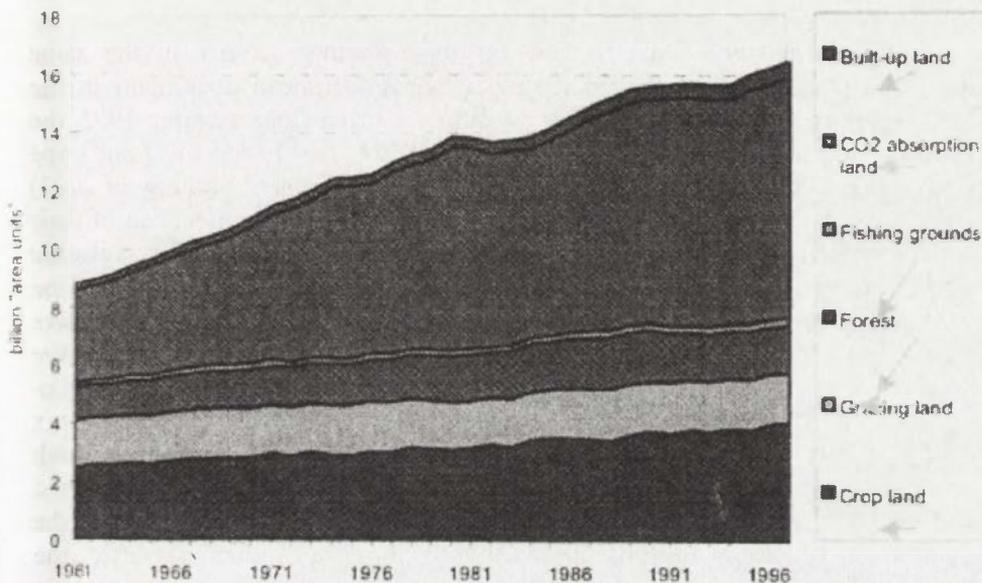
Disturbances to the nature of environmental properties and their assessment

The need to plan and manage an environment in a manner corresponding with the principles of sustainable and harmonious development results *i.a* from a very rapid current intensification of anthropopressure and attendant destructive processes in the geographical environment. These include the curtailment or distortion/disturbance of:

- landscape structures,
- landscape diversity,
- the spatial cohesion of valuable natural areas,
- the stability to the flow of matter and energy in the environment,
- natural resources,
- the social utility of the environment's quality.

One of the measures applied in estimating disturbances to the functioning of the environment (in the meaning of a system) involves the so-called "ecological footprints" of EU member states. These determine the relationship between the level of consumption of food, raw materials and energy by a person in a given unit of time, and the area of the Earth's surface involved in supplying these needs. Account is taken of land areas capable of biological productivity and areas of the ocean able to produce natural raw materials, as well as land showing a capacity to absorb the CO₂ arising through power generation (EU Strategy for Sustainable Development, 2001). Anthropopressure on the environment has risen very sharply, the increase in the years 1970 - 1999 having exceeded 50% (converting to an annual rate of increase of around 1.5%, Fig. 1).

Fig. 1. World ecological footprint, 1991-1997 (according to the EU Strategy for Sustainable Development, 2001)



In contrast, there is a steady decline in the area of components of geographical space defined in ecological analyses in terms of their utility for society, i.e.: agricultural land as a source of food crops, meadows as places of production of pseudo-alimentational plants, forests as sites producing timber and sequestering CO₂, and fishing grounds as the sources of food from the sea. Defined per unit in regard to the number of hectares characterised by average productivity for the world as a whole, there are now about 2 ha for each of the world's human inhabitants. However, each person in EU member states - bearing in mind the high levels of consumption he or she engages in - requires more than 6 ha. The figure for Central and Eastern Europe is around 4.5 (EU Strategy for Sustainable Development, 2001). For this reason too, the protection of the environment, its structure, diversity and resources, have become priorities in the environmental policy of the EU (Degórski, 1999; Arler, 2000). Bearing in mind the multifunctional nature of the environment and its treatment as a system of socio-cultural and natural elements interlinked by mutual feedbacks, plan-

ning works take account of the postulates of other sectoral policies, like for example the trans-European treaty on communication networks, the Common Agricultural Policy, environmental policy and the treaty on technological research and development.

Formal and legal assumptions behind spatial planning activity

The formal and legal frameworks underpinning activity in the name of spatial planning (as provided for by such pan-European documents as the Pan-European Strategy for Biodiversity and Landscape Conservation, 1995, the European Spatial Development Perspective 1999, the European Landscape Convention 2000 and the European Sustainable Development Strategy of 2001) allow for the strengthening of regional identities and the maintenance of their natural and cultural diversity. It is assumed that not all ecologically-valuable land requires rigorous protection. Areas less vulnerable to destruction may be used in a manner that goes along with their ecological function. Protective regulations and restrictions on developments should not then have a negative influence on the lives of inhabitants. It is recommended that valuations of ecological resources be carried out, and that these be treated as a subject of tax policy. In assumptions concerning the development of the environment which are devised for the needs of a given area's development concept, account must also be taken of protection of the climate and waters, *inter alia* through the creation of structures of settlement networks limiting vehicular traffic, the showing of preferences for forest management and the use of water resources in line with the principles of sustainable and harmonious development.

The most naturally-valuable areas in EU member states are subject to conservation activities entailing protection of the natural habitats most valuable from the natural point of view, as well as European flora and fauna. Such activity is well-grounded in law thanks to Directives of the EU like the Habitats and Wild Birds Directives, operating alongside and in accordance with the Berne, Bonn and Barcelona Conventions. In contrast, work on the creation of a network of protected areas has been ongoing since 1996 within the framework of the Pan-European Ecological Network programme (Opstal, 2001). The instrument serving in the obtainment of a cohesive system of protection is the NATURA 2000 programme.

A further matter embraced by pan-European legal solutions is the cultural landscape. On the one hand, attention is paid to its essence, and to its very important role as an element expressing the interdependence of humankind and nature. On the other hand, emphasis is put on the fact that the protection of the cultural landscape shall not place excessive restrictions on the economic activity of societies. In the European Spatial Development Perspective (1999), stress is also placed on the fact that the cultural landscapes in Europe are subject to

constant change – something which is capable of leading to some kind of unification or homogenisation. To arrest the latter processes in the continent's urbanised landscapes, many planning studies advocate a creative shaping or re-shaping of cultural landscapes, rather than any preservation of the status quo (Nassauer, 1995; Naveh, 1995). In EU countries, all buildings qualifying as monuments are subject to special protection in accordance with the Council of Europe's Convention for the Protection of the Architectural Heritage of Europe (Granada 1985), while states party to it are obliged to maintain these as they take the needs of contemporary society into account.

In contrast, there has to date been a lack of strategies for the creative planning of the urban environment in EU documents. However, the need for such activity was drawn attention to in the European Spatial Development Perspective (1999) and the Sustainable Development Strategy (2001). It is emphasised that many towns and cities in Europe are threatened with a commercial uniformity of spatial form clouding their individuality and identity, while in fact modern building of new architecture should not be treated as an undesirable element in urban space, but only as a potential source of enrichment of the cultural heritage.

What is very important from the point of view of the multifunctionality of the environment and its sustainability-friendly development is the transition zone between rural and urban areas. Bearing in mind the several spatial levels taken account of in EU planning studies (i.e. the local, regional, supraregional, inter-regional and supranational), matters linked with managing the environment of suburban zones find their legal bases in a variety of Union documents. Most space is devoted to regional development, wherein the function of towns and cities is perceived to be as stimulator of regional development (as in the European Spatial Development Perspective 1999 and Sustainable Development Strategy 2001). The EU assumptions and guidelines for open areas are already taken account of in the studies being put into effect in Poland (Degórska 2002).

A further matter of importance as regards the functioning of the whole natural system and its structures is the attainment – as the environment is managed – of the most limited possible non-concordance with its potential, as well as the lowest concentration of human impact on the environment. Instruments by which to meet this objective include the polycentric models on which the concept for the further development of the trans-European Networks or TENs is, for example, based. A further reinforcement of the legal side to protection of the environment (and the principles by which it can be managed in line with the assumptions of the 1995 Pan-European Strategy for Biodiversity and Landscape) has come with the European Landscape Convention, signed in October 2000 by 18 European countries. This ushers in a new legislative quality that puts into order many of the issues associated with the shaping of the landscape -

where landscape is understood as an external manifestation of the physiognomy of the environment (Roch 2002).

Supraregional cooperation in its Eastern European dimension

The EU's European Spatial Development Perspective assumes later application by accession countries, while the Council of Europe's European Landscape Convention applies to all 45 member states as soon as they sign up to it. In turn, important instruments in the pursuit of efforts to adjust to EU standards have been the Union's INTERREG IIC programmes for the Baltic Sea region and Central Europe, as well as CADSES for the Adriatic, Danube and SE European region. These supraregional solutions to problems regarding the correct management of the environment have also found their place in the INTERREG III Community Initiative prepared for the years 2000-2006, and in the documents seeking further cooperation in the Baltic region (i.e. VASAB 2010+) and the CADSES region (VISION). In this way, opportunities for enhanced cooperation between individual EU member states and pre-accession countries have arisen.

International NGOs are also being established to support these kinds of initiative. One such - working for environmental management and planning in line with sustainable development principles - is the European Centre for Research and Environmental Interests (CEIRE). This cooperates on a partnership basis with the Council of Europe, on projects connected with environmental management (like the Pan-European Strategy for Biodiversity and Landscape Conservation, "Europe Our Common Cultural Heritage" and the preservation of the landscape character of rural areas).

A particular place in work on environmental management concepts is taken by environments that encompass areas uniform from the natural point of view but divided by administrative boundaries, especially the borders between states (Degórski, 2002b; Degórska, 2003). The legal framework for environmental management in such border regions is provided for in the European Outline Convention on Transfrontier Cooperation between Territorial Communities or Authorities (Madrid Convention) from 1980, as well as the 1985 European Charter of Local Self-Government, signed in Strasbourg (Degórska, 2003)

Variants solutions to environmental problems in development strategies

In the spatial planning of EU states, the properties of the natural environment are analysed together with those of the socio-economic-cultural environment, as elements that go together to generate the multifunctional character of space (Degórski, 2001, 2002a, 2003). This in turn combines with the defini-

tion and understanding of the environment to offer a basis for the creation of regionally-diversified solutions as regards environmental management in EU countries (Androp, 2000; Handley, 2000; Tress *et al.* 2003). These take in four main thrusts to activity:

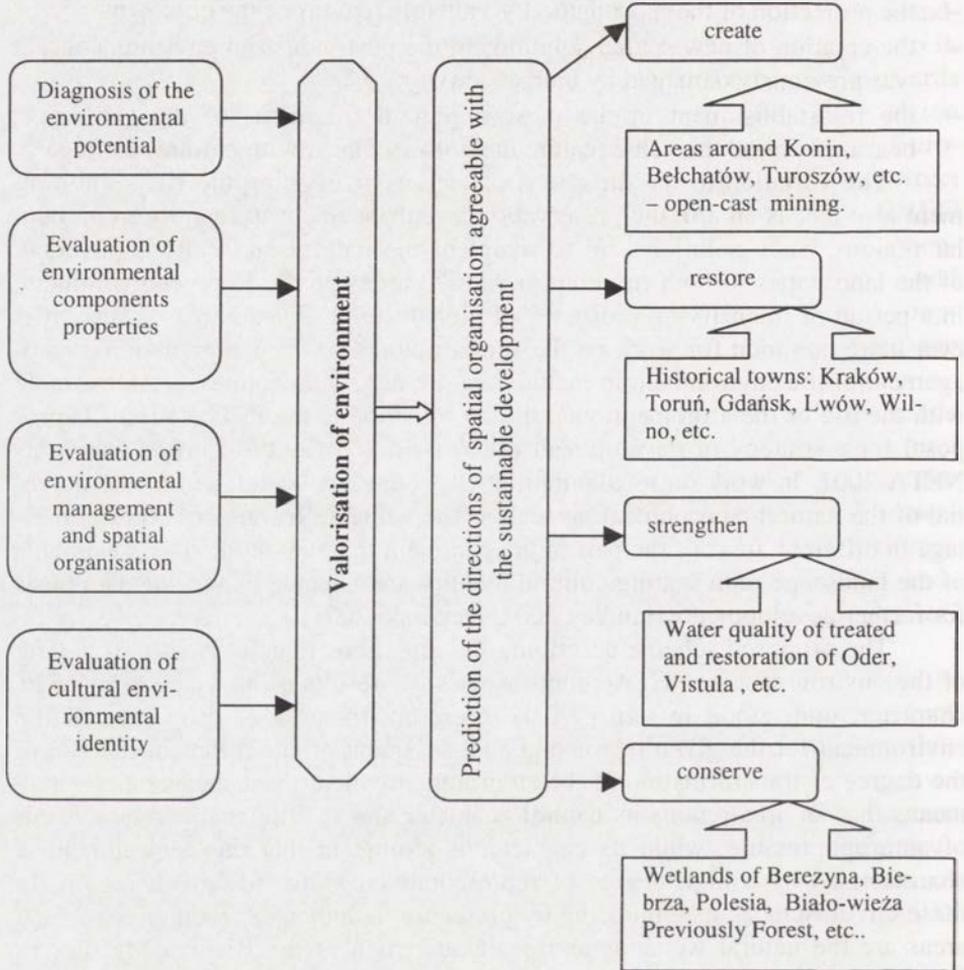
- the enhancement of environmental quality in areas characterised by a significant improvement in its properties through reinstatement work,
- the protection of the most naturally-valuable regions of the continent,
- the creation of new spatial solutions in the post-industrial environment that was previously damaged by human activity,
- the re-establishment of the most important fragments of the landscape, bearing in mind the value feature thereof associated with cultural heritage.

The variation to the directions of activity in shaping the EU's environment also has as an aim the preservation or enhancement of identity in particular regions. Such solutions are to maintain the natural and cultural diversity of the landscapes of both rural and urbanised areas on the European continent, in a period of intensifying processes of globalisation. For this reason also, it is ever more common for work on the supra-regional or even supranational management of the environment to include the pre-accession countries. An example with the use of the aforementioned thrusts to action is the INTERREG IIC proposal for a strategy of development of Western and Central Europe known as NETA 2001. In work on its assumptions, account has been taken of the potential of the natural environment, as well as the valuable features of cultural heritage in different areas of the part of the continent that was studied – as elements of the landscape representing cultural identity and capable of serving as a basis for further development (Handley 2001; Degórski 2001).

The proposed scheme describing the directions to activity in the shaping of the environment in NETA countries uses the results of an assessment of its character, understood in terms of the representativeness of properties of the environment for the given region and an assessment of conditions in relation to the degree of transformation of the environment where these are good. "Good" means that an area retains its natural character and is little changed as a result of anthropopressure, while its character is strong, in that the environment is characterised by a high degree of representativeness for the given region. In these circumstances its embracing by protection is indicated. Examples of such areas are the natural wetlands and peatlands (such as the Biebrza Marshes in Poland, the Berezinsky Marshes in Belarus and the marshes of the Ukrainian part of Polesie). Then there are such forests as still retain their primaeval character, like Poland's Puszcza Białowieska and the adjacent Belavezhskaya Pushcha in Belarus. In contrast, where the properties of the environment have been very much changed through human impact and have lost their character, activity may be engaged in to recreate this from scratch. Examples might be former mining (particularly open-cast-mining) areas, such as those around Bełchatów,

Turoszów and Lubin in Poland, and the Saxony-Lausitz coalfield in Germany and the Czech Republic) – Fig. 2.

Fig. 2. Model to the creation of strategy option for the directions of action accounting for the environmental and cultural dimensions in the spatial organisation of central and eastern Europe.



Summary

The documents currently in effect in the EU as regards the environment in the system of spatial planning go together to form a cohesive formal and legal whole which provides for the proper management of space. It is not treated

as a closed system, but is rather being perfected continually. Work with a view to new instruments being developed and environmental protection and management optimised is being carried out in relation to three subject areas: of the Council of Europe's Pan-European Strategy for Biodiversity and Landscape Conservation, of the CoE's Berne Convention on the Conservation of European Wildlife and Natural Habitats and of the promotion and enhancement of society's awareness of biodiversity, geodiversity and landscape diversity. From the moment the countries of Central Europe – including Poland – accede to the EU, the formal and legal system shaping and protecting the environment there will be binding upon them. It is thus of key importance to recognise the advantages and disadvantages of this system in the pre-accession period, in order that there can be conscious application of its premises immediately after Poland joins the Union, as required under its Accession Treaty.

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Streszczenie

PRAWA UWARUNKOWANIA ZAGADNIENÍ ŚRODOWISKA W PLANOWANIU PRZESTRZENNYM UNII EUROPEJSKIEJ I ICH WYMIAR WSCHODNI

Poprawne, to znaczy zgodne z założeniami trwałego i harmonijnego rozwoju gospodarowanie środowiskiem geograficznym rozumianym jako system sprzężonych z sobą elementów abiotycznych, biotycznych, społeczno-ekonomicznych i kulturowych jest obecnie jednym z priorytetów polityki przestrzennej w krajach Unii Europejskiej (EU Strategy for Sustainable Development, 2001). Elementy środowiska geograficznego charakteryzują się pewnym porządkiem, który człowiek nakłada na rzeczywistość i który pozwala mu tę rzeczywistość poznać i przekształcać (Domański, 2002, Degórski, 2003b). Działania takie mają charakter subiektywny i są podporządkowane pewnym założeniom, jakie przyjmuje się w tworzeniu modeli teoretycznych zagospodarowania przestrzennego danego obszaru. Prace planistyczne uwarunkowane są czynnikami społecznymi, ekonomicznymi i kulturowymi, a także uwzględniają wyniki wieloletnich badań, przedstawianych w postaci modeli empirycznych. Doświadczenia zdobyte poprzez prowadzenie wieloletnich badań pozwalają następnie na kreowanie podstaw prawnych, które tworzą osnowę legislacyjną dla procedur i rozwiązań planistycznych. W krajach Unii Europejskiej ogólne zasady kształtowania przestrzeni geograficznej wypracowywano przez ponad 30 lat i obecnie ujęte są one między innymi w kilku zasadniczych dokumentach Unijnych, takich jak: Paneuropejska Strategia Różnorodności Biologicznej i Krajobrazu (1995), Europejska Perspektywa Rozwoju Przestrzennego (1999), Europejska Konwencja Krajobrazowa (2000) oraz Europejska Strategia Zrównoważonego Rozwoju (2001). Dodatkowo, w krajach Wspólnot Europejskich wypracowano szereg dokumentów szczegółowych, regulujących przepisy dotyczące specyficznych obszarów, jak na przykład terenów przygranicznych (Europejska Konwencja Ramowa o Współpracy Transgranicznej, 1980), lub zagadnień związanych z ochroną przyrody i naturalnych siedlisk (Konwencja Berneńska, 1979) i dyrektywa dotycząca ochrony naturalnych i seminaturalnych siedlisk oraz fauny i flory, (1992).

W artykule zaprezentowano główne kierunki działań związanych z problematyką środowiska w planowaniu przestrzennym i obowiązujących procedur w państwach Unii Europejskiej, zgodnych z rozwiązaniami przyjętymi w dokumentach unijnych. Szczególną uwagę zwrócono na zgodność przyjmowanych rozwiązań formalno-prawnych w kształtowaniu środowiska, nie tylko z ustawodawstwem Unii Europejskiej, ale również ze strategiami rozwoju opracowywanymi dla poszczególnych regionów Europy, w tym dla regionu Europy środkowo-wschodniej. Strategie te uwzględniają specyfikę każdego z regionów oraz przedstawiają drogę zachowania, między innymi poprzez wzmacnianie ich tożsamości polegającym na utrzymaniu przyrodniczego i kulturowego różnicowania.

Abstract

ADAPTATION OF THE HUMAN MOTOR SYSTEM TO THE WORK

The human motor system adapts to the work by changing the way it uses its muscles and joints. This adaptation is a result of the nervous system's ability to learn and adjust to the demands of the work. The process of adaptation is influenced by factors such as the duration and intensity of the work, the complexity of the tasks, and the individual's physical and mental state. Adaptation can lead to both positive and negative outcomes. On the one hand, it can improve performance and reduce the risk of injury. On the other hand, it can lead to fatigue, muscle soreness, and other health problems. Understanding the process of adaptation is important for designing work that is safe and effective. This paper discusses the factors that influence adaptation and the ways in which it can be managed. It also provides some practical suggestions for preventing and treating work-related musculoskeletal problems.

ENVIRONMENT PROTECTION - AN ELEMENT OF BULGARIA'S POLICY FOR ACCESSION TO THE EUROPEAN UNION

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In recent decades mankind has had to overcome the adverse influences, exerted on the environment by the processes of industrialization and urbanization, by the overuse of fertilizers, pesticides and plastics, by globalization, intensive farming, tourist industry, etc. These processes have resulted in the exploitation of new and steadily increasing quantities of natural resources, in the management of new areas, in the environment anthropogenization, in the disturbance of the natural balance and in the extinction of some rare and threatened plant and animal species. The European continent is considered to be one of the most seriously affected in this respect.

Investigations, carried out by the European Environment Agency, indicate that in spite of the effective environment policy of the EU member-states implement, there is still much to be done as far as the environment quality is concerned. Similar is the situation in the other European states. The complexity of environment problems, their relationship and the necessity to find a proper solution to them have required from the European countries to combine their efforts, financial resources and capacities. The environment protection on the oldest continent of the world is the right and responsibility of each nation and of each individual. As a European country Bulgaria has made, is making and will make its contribution to the conservation of the natural wealth and to the preservation of the biological diversity in the southeastern part of the continent.

Bulgaria began to pursue a permanent, target-oriented environment policy at the end of the 1960s and in the beginning of the 1970s. Nevertheless, such a policy was initiated much earlier - the first General Law on Nature Protection, called a Decree, was adopted in 1936. The environment protection in Bulgaria has century-old history and traditions. As early as in the first years after Bulgaria's liberation from the Ottoman rule (1878), when the country started to recover, restrictions were made with regard to forest cutting, game hunting and fishing with the adoption of the following Laws: Law on Fishing (1883), Law on Forests (1884) and Law on Hunting (1897). In 1887 Bulgaria was the coun-

try passed the first law in Europe that banned the killing of *Aegypius monachus* (L., 1766), *Gyps fulvus* (Hablizl, 1783), *Neophron percnopterus* (L., 1758), *Gypaetus barbatus* (L., 1758). In 1928 the Union of Home Nature Protection was established. In the early 1930s the first protected areas in Bulgaria were designated - the reserves of "Silkosa" (Strandzha), 1933 and "Parangalitza" (Rila), 1933 and the national park "Vitosha" (1934) - the first national park not only in Bulgaria but on the Balkan Peninsula, too.

The adoption of a number of environmental protection acts and the designation of dozens of protected areas (national parks, reserves, natural landmarks, etc.) illustrate that after the World War Second the government began to regard the environmental issues with deep concern. At the same time the processes of industrialization and urbanization led to accelerated man-induced changes in certain regions of the country, primarily in those around towns, urban agglomerations and industrial centers which for quite a long period (from the 1950s to the 1980s) continued to cause substantial environment disbalance and degradation. Article 24 from the 1963-Act on Air, Water and Soil Protection was in favour of environment protection. According to it no industrial plant could be put into operation without being equipped with purification facilities (only those of national importance made an exception). In fact, the enterprises as a whole didn't have such facilities. The latter were available in very few of them which actually caused environment pollution throughout the country. Environmental deterioration was enhanced by the priority development of heavy industries, by the low technological level in the enterprises, by the impossibilities for rational and comprehensive use of the natural resources and by the production which was more material-, energy- and water- consuming than that in the advanced states. As a result, the amount of environment pollutants increased, the areas affected by human activities expanded and the ecological equilibrium in some regions was upset. These negative processes demanded from the government and society to take organizational, legal, economic, technological and any other kind of appropriate measures.

Environment protection activities have been carried out by different ministries and departments. In the 1960s they were mainly the responsibility of the Ministry of Forests and Environment. In the 1970s an independent administrative body was established, known as the Environment Commission at the Council of Ministers. It consisted of 16 regional environmental inspectorates and one Research Center on Environment and Water Protection. In 1990 the Ministry of Environment was set up (now renamed into the Ministry of Environment and Water), which implemented the government environmental policy (Table 1). The former Research Center was replaced by the National Center of Environment and Sustainable Development.

Table 1. Major Functions of the Ministry of Environment and Water

To develop and control environmental legislation enforcement.
To control the state of the environment and to coordinate the measures and activities, aiming to protect it from pollution, damage and degradation.
To coordinate and strictly observe the adherence to the international engagements and the cooperation in the field of environmental protection.
To organize and implement the government environmental strategy by using economic levers and mechanisms.
To exercise control together with other ministries over the environmental impact assessment.

Source: *Pregled na ekologicnitate deinosti...*, 1996

The Ministry of Environment and Water closely collaborates with the Ministry of Health, the Ministry of Agriculture and Forests, the Ministry of Regional Development and Public Works, the Ministry of the Interior Affairs, etc., as well as with other state organs, with the municipalities, non-governmental organizations, institutions of higher education, etc.

The primary objective of the current environmental policy is to guarantee preservation and efficient use of the natural resources at a national level and to provide the population with healthy food in the conditions of sustainable development. In order to achieve this goal, the following priorities have been emphasized:

- life quality improvement in the country;
- acceleration of the processes, facilitating the integration of the country into the European structures and successful preparation for its EU membership;
- complete integration of the environmental policy into the specialized sectoral policies;
- preservation and maintenance of high biological diversity;
- harmonization of Bulgaria's environmental legislation with the EU environmental laws.

The improvement of environmental quality in Bulgaria is one of the primary challenges in the course of its negotiations with the EU. During the transition period considerable work has been done in this respect both in the sphere of wildlife preservation, protection of the environment purity and in environmental legislation.

The national and international experience has proved that today it is most difficult to find solutions to the environmental issues. Despite all measures, aimed at a better environment quality, more effective environmental legislation and its rigorous enforcement, there is still much to be done. This conclusion is confirmed by the analysis on the present-day environment conditions. It is widely recognized that as a whole during the transition period the environment quality has improved. This is due to two chief causes. The first is to be associ-

ated with the implementation of a consistent and target-oriented governmental strategy, with the changes in the production technologies and with the construction of purification facilities for air and industrial and domestic waste water cleansing, of depots for industrial and domestic waste products, etc. The second cause, having led to environment quality improvement, is quite paradoxical because it was only owing to the shut down of numerous industrial plants and to the production decline that the amount of waste industrial waters and of the emitted in the air pollutants dropped. Generally, the environment pollution was reduced and the self-purification capacities of the environment grew. For example, the emissions of carbon dioxide in the atmosphere (the most serious air pollutant in the country) decreased by more than one third during 1997-2001 (Fig. 1). This trend was characteristic of all planning regions, including the ones where the biggest polluters were located (Fig. 2). The concentrations of sulphur and nitric oxides were also reduced by almost one third (Fig. 3). The greatest emissions of sulphur oxides were recorded in the regions with the most powerful thermo-electric plants and with chemical and petro-chemical industries: "Maritza-Iztok" - Dimitrograd, Pernik - Bobovdol, Varna - Devnya, Bourgas, Sliven, Svishtov, etc. During the above mentioned period (1997-2001) a downward trend was observed with respect to the amounts of supplied and consumed water by 25% and 31% (Fig. 4). Stations treatment plants were constructed mainly around certain settlements on the Black Sea Coast in order to keep the sea water clean (Fig. 5). One of the ecological problems, difficult to be solved, related to the abolishment or treatment of solid industrial and domestic wastes in spite of the fact that their quantities decrease (Fig. 6) as a result of the unfavourable trends in the development of industry and production drop during the transition to market economy. The greatest quantities were accumulated near the mining centers in the districts of Stara Zagora, Sofia, Pernik, etc. (Fig. 7).

In Bulgaria there is a clear statement that the accession of the country to the EU means adoption and unification of the respective policies, approaches and standards in the political, economic, social and other spheres, including the environment protection. Bulgaria and the EU signed an Accession Agreement in 1993 came into effect in 1995. In March 2000 started the negotiations for Bulgaria's membership into the EU. The environment objectives and priorities have to contribute to their conclusion until May 2004 will enable the country to become a EU full member at the turn of 2007. Prior to May 2003 there began negotiations on 26 chapters out of the total 31 and on 24 of them they are already finalized.

The negotiations on Chapter 22 "Environment" were initiated on July 27, 2001, and finished towards the end of June 2003. Bulgaria does its best to overcome the obstacles arise during the unification of the strategy, approaches and standards in the field of environment with those in the EU-member states. Bulgaria discharges its duties, formulated in a number of bi-lateral and multi-lateral

contracts and agreements and ratified conventions, concerning environmental issues (Table 2). At the same time attempts are made to harmonize the legislation by adopting new laws and normative acts (Table 3). They comply with the EU requirements and criteria, approved at the summit meeting in Copenhagen (1993).

Table 2. More important conventions in the field of environment protection signed by Bulgaria

	Convention	Year of adoption	Year of ratification
1.	Convention on fishing in the Black Sea	1959	1969
2.	International convention on the open sea intervention in case of hazard-related oil pollution	1969	1983
3.	Ramsar Convention on wetland zones of international importance, particularly habitats of water birds	1971	1976
4.	Convention on avoiding sea pollution from ships	1973	1984
5.	Washington Convention on international trade with extinct wild flora and fauna species	1973	1990
6.	Convention on protection of the world natural and cultural heritage	1976	1976
7.	Convention on prohibition of military or any other hostile impact on the environment	1977	1978
8.	Geneva Convention on trans-boundary air pollution at long distances	1979	1981
9.	Bern Convention on protection of European wildlife and natural habitats	1979	1991
10.	Bonn Convention on protection of migrating species	1979	1999
11.	Vienna Convention on ozone layer protection	1985	1989
12.	Convention on effective warning in case of nuclear accident	1986	1988
13.	Convention on assistance in case of nuclear accident or accidental radioactive contamination	1987	1988
14.	Basel Convention on control of cross-border transfer of hazardous wastes and their treatment	1989	1996
15.	Convention on environmental impact assessment in trans-boundary context	1991	1995
16.	Convention on protection of the living sea resources of the Antarctic		1992
17.	Convention between the Bulgarian and Romanian government on cooperation in the sphere of environment		1992
18.	Convention on protection of the Black Sea from pollution	1992	1992
19.	Convention on trans-boundary impact of industrial accidents	1992	1995
20.	The UNO Framework Convention on climate change	1992	1995
21.	Convention on biological diversity	1993	1996
22.	Vienna Convention on nuclear safety	1994	1995
23.	Convention on protection and use of trans-boundary water streams and lakes in cross-border areas	1992	not ratified
24.	Convention on cooperation with regard to protection and sustainable management of the Danube river	1994	not come into effect
25.	Convention on access to information, participation of the	1998	not come

	public in decision-making and possibilities for bringing environmental issues to court		into effect
26.	Stockholm Convention on resistant organic pollutants	2001	not ratified

Source: *Geografia na Bulgaria*, 2002

Undoubtedly, "Environment" is a chapter difficult to negotiate. It has been one of the biggest challenges for the other EU candidate countries, too. The main cause is to be sought in the fact that the previous criteria and norms about environment protection in Bulgaria and the remaining nations in transition from Central and Eastern Europe, considerably differ from those in the EU member-states. Many factors in these countries, including Bulgaria, have contributed to the unfavourable ecological conditions such as long-lasting state ownership, poor technologies for natural resource extraction and processing, insufficient financial resources, etc.

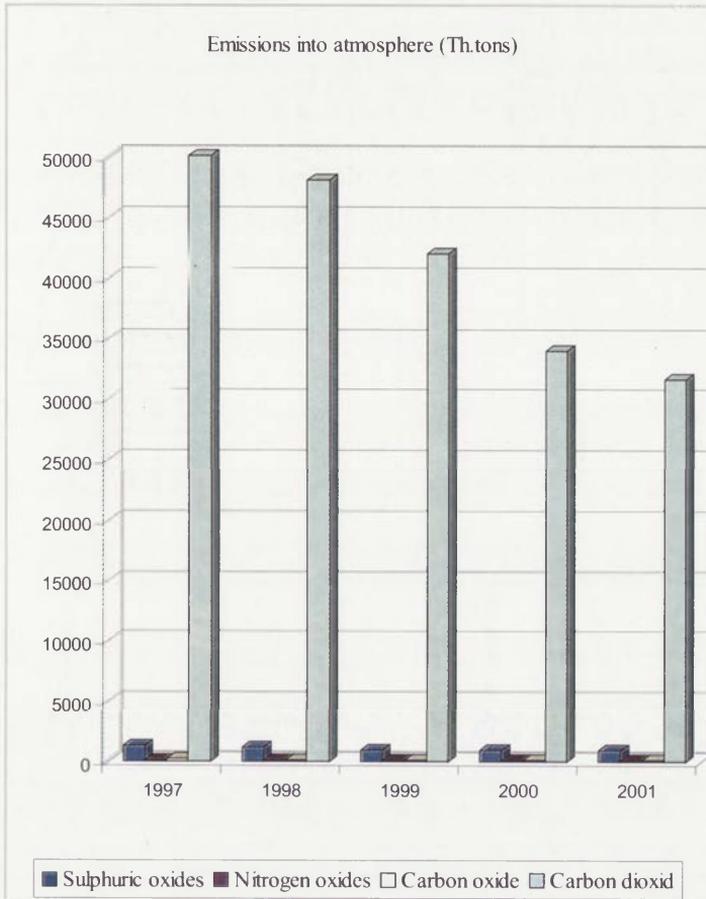
Table 3. New Environment Laws and Regulations in Bulgaria (1995-2002)

Name	Year of adoption
Law on atmospheric air purity	1996
Law on agricultural land protection	1996
Law on protection of new crop varieties and animal breeds	1996
Law on plant protection	1997
Law on forests	1997
Law on restriction of the wastes' harmful effect on the environment	1997
Law on protected areas	1998
Law on waters	1999
Law on medicinal plants	2000
Law on environment protection	2002
Law on biological diversity	2002
Law on harmless use of nuclear power	2002
Regulation # 14 about the efficiency of harmful substances emitted in the air over inhabited localities	1997
Regulation # 4 about the environmental impact assessment	1998
Regulation about the maximum permissible radioactive contamination of agricultural products	2002
Regulation about the requirements for reducing the radioactive contamination of foodstuffs	2002

Nevertheless, it is noteworthy that alongside with the so called "critical areas" or "hot spots", there are vast regions in Bulgaria, mainly in the mountain zones, with unchanged natural environment. Most of them are involved in the national protected areas' network thanks to the conservation policy implementa-

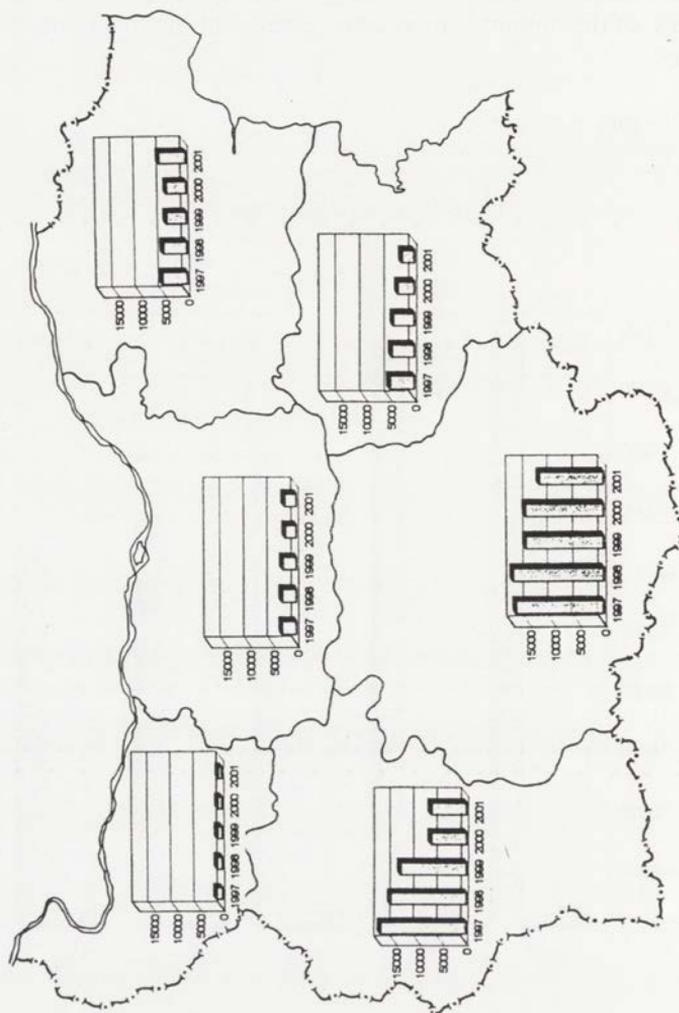
tion (Fig. 8). In 1988 Bulgaria adopted the EU classification system and now the protected areas and objects are being re-categorized. The protected areas constitute 4.8% of the country's total area - a per cent much higher than in many other countries.

Fig. 1. Emissions into atmosphere



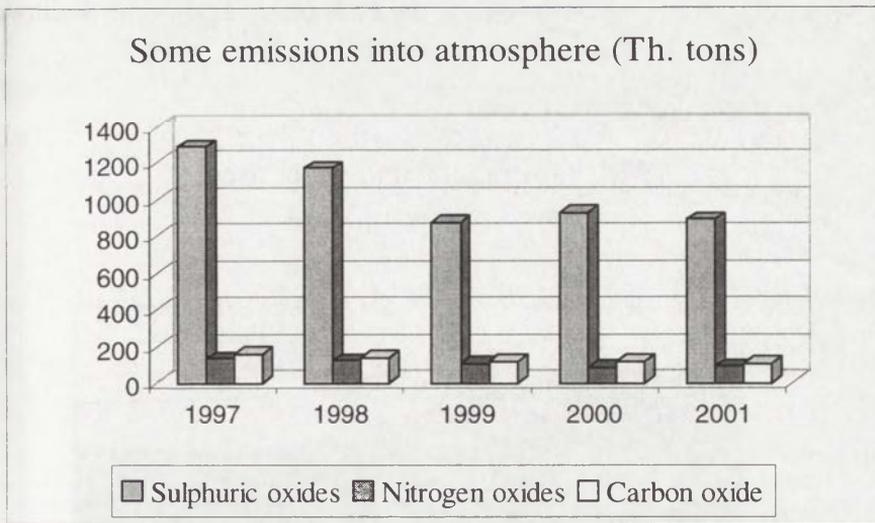
Source for information: *Regions and districts in Bulgaria 1997-2001*, Sofia, 2003

Fig. 2. Emissions of Carbon dioxide into atmosphere by planning regions (1997-2001, Th. tons).



In order to meet the EU criteria and to conclude the negotiations, keeping the deadlines, the Bulgarian government worked out a national "Strategy on accelerating the negotiations for Bulgaria's accession to the EU" (2002). Its environmental priorities are in conformity with the steps and tasks, outlined in the "Road Map", which concerns Bulgaria's preparation for full membership and which was approved by the European Council in Copenhagen in 2002 (Table 4).

Fig. 3. Some emissions into atmosphere



Source for information: *Regions and districts in Bulgaria 1997-2001*, Sofia, 2003

Table 4. Major Environmental Priorities in Bulgaria at the Beginning of 21st Century

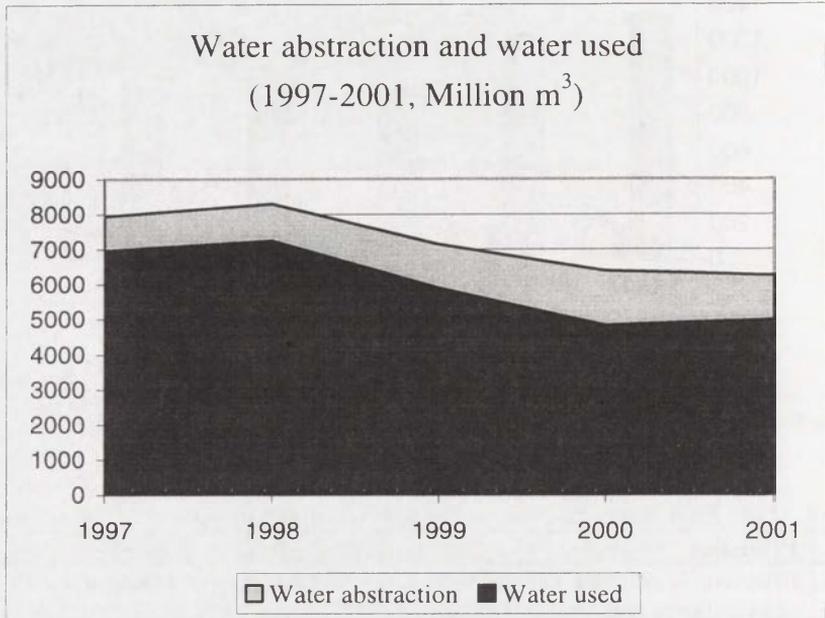
	Priorities
1.	Effective legislation enforcement and elaboration and practical application of investment and financial strategies
2.	Adoption of laws, related to genetically modified organisms, to noise from machines and other equipment, to waste management, air purity, nature protection, radioactive protection, industrial pollution and risk control
3.	Regular consultations with managers from industrial sector for discussing the responsibilities and duties, related to the necessary investments that will enable the harmonized legislation enforcement
4.	Qualification improvement of the employees, aimed at more effective enforcement of the national legislation, harmonized with the EU one

Source: *Strategia za uskorjavane na pregovorite za prisaedinjavane na Republika Bulgaria.....*, 2002.

A lot of financial resources are needed to preserve the natural wealth of the country and to improve the environment quality. It is well known that the environment protection is a costly activity and Bulgaria like the other Central and East-European nations in transition do not have the necessary funds. However, as a whole the expenditures for environment protection increase (Fig. 9). Significant disparities are discernible between different planning regions. In 2001 the Northwestern and Southwestern regions were remarkable for their highest share of environmental investments (Fig. 10). This can be attributed to

the important work done to raise the NPP-Kozloduy safety and to improve the environment quality in the economically most advanced region - the Southwestern one.

Fig. 4. Water abstraction and water used



Source for information: *Regions and districts in Bulgaria 1997-2001*, Sofia, 2003

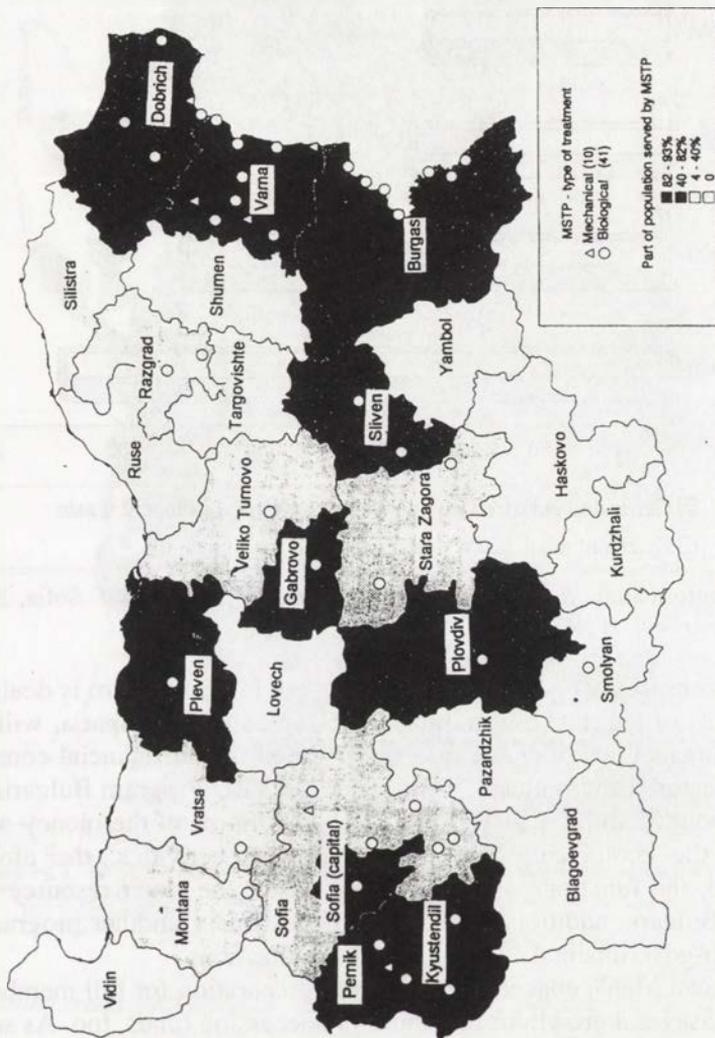
Willing to meet the EU environment-related requirements and standards, Bulgaria explores every possibility to ensure finances from international organizations and institutions, from EU pre-accession funds, etc. For example, Bulgaria like Poland takes advantages of the public debt-for-environment swaps. In 1995 an agreement was signed with Switzerland bought and will put under control part of Bulgaria's foreign debt, estimated at 20 million Swiss francs.

Very important for Bulgaria is the financial support under the EU PHARE, ISPA and SAPARD Programs, including the environmental protection activities. As for the allocated grants from pre-accession funds, Bulgaria ranks third after Poland and Romania.

In 1990 Bulgaria was included in the PHARE Program and by 2001 had received over 1 billion EURO. Although the investments under this program go mainly to consolidate the legal system and bring closer the Bulgarian and EU economic and social spheres, they are also oriented towards environment projects. For instance, within the framework of the National Program "PHARE-Bulgaria 2002" the country received 6.85 million EURO for support of the pre-

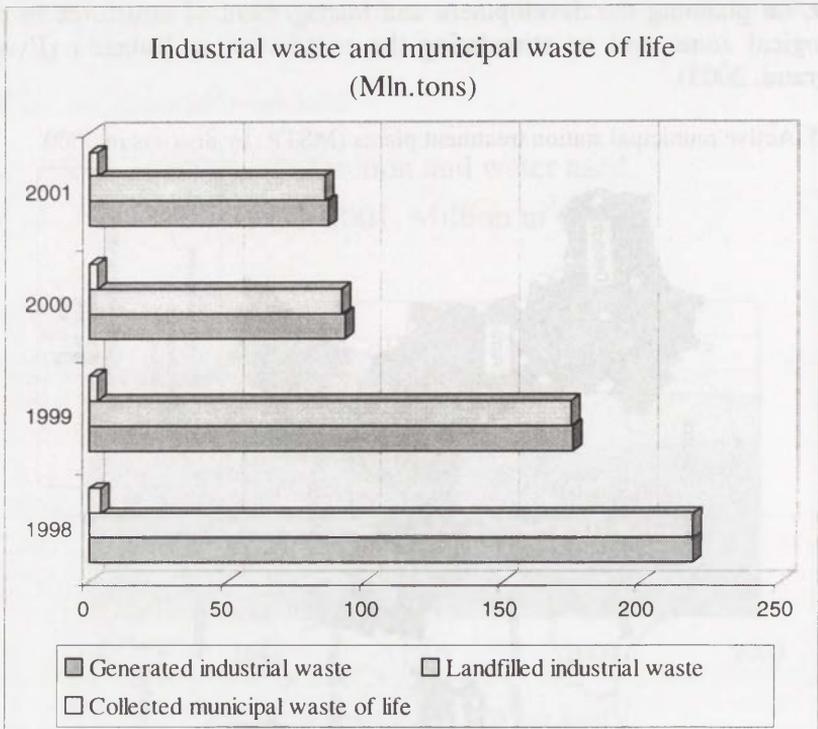
accession strategy on environment in the rural regions, on rural areas development, on planning the development and management of structures in the wet ecological zones and on stimulating the ecotourism in Bulgaria (Evropejski programi, 2003).

Fig. 5. Active municipal station treatment plants (MSTP) by districts in 2000



Source: *Okolna sreda 2000*. Nationalen statisticheski Institut, Sofia, 2002.

Fig. 6. Industrial waste and municipal waste of life

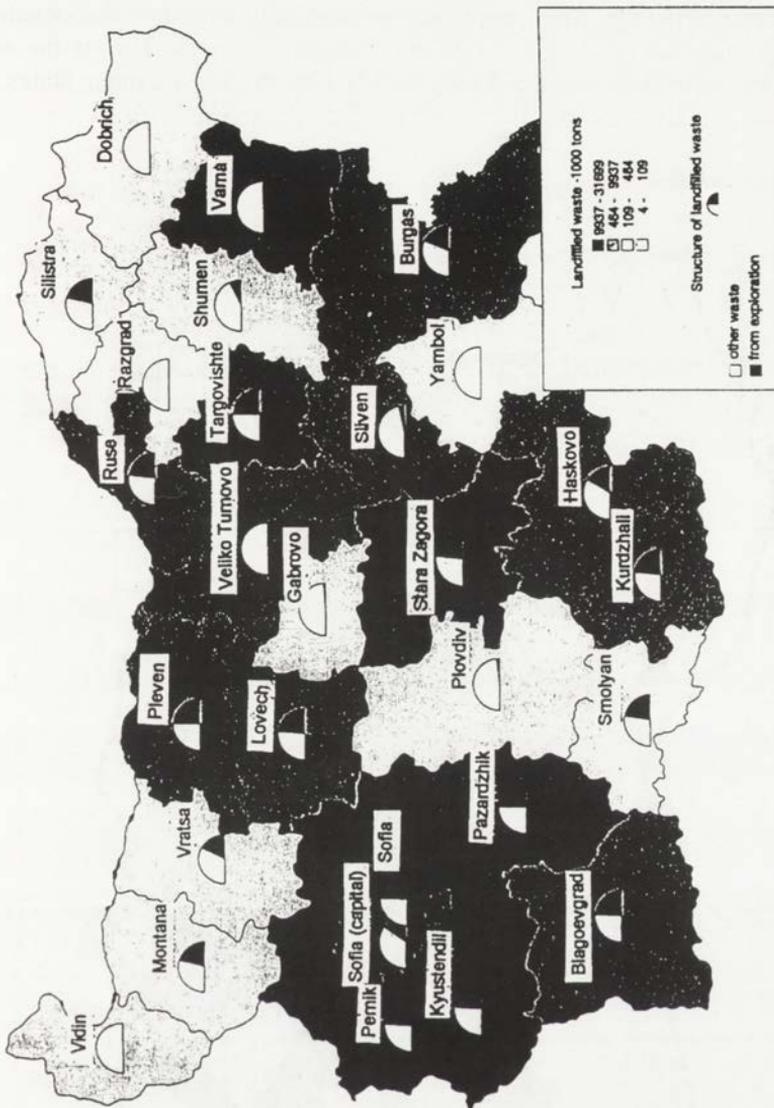


Sources for information: *Regions and districts in Bulgaria 1997-2001*, Sofia, 2003
Statistical Yearbook 1999, Sofia, 2000

Environment is one of the key aspects the ISPA Program is dealing with. In 2003 most of the total 240 million EURO, granted to Bulgaria, will be used for environmental activities because six of the all seven financial contracts are related to sector "Environment". Under the SAPARD Program Bulgaria can get annually about 53 million EURO free of charge. Some of the money will go to encourage the ecologically friendly agricultural activities, the afforestation of farmland, the functions of forestry enterprises, the water resource management, etc. Bulgaria additionally receives money under another program for financing non-governmental environmental organizations.

The "Road Map", concerning Bulgaria's preparation for full membership in the EU, envisages a growth of the future pre-accession funds, too. As suggested by the European Commission, the EU member states will increase them (which are currently about 300 million a year) by 20% in 2004, by 30% in 2005 and by 40% in 2006. Both in short-term and long-term perspectives Bulgaria have to focus its attention on the environmental investments, management and introduction of the EU legislation.

Fig. 7. Landfilled industrial waste by districts in 2000



Source: *Okolna sreda 2000*. Nationalen statisticheski Institut, Sofia, 2002.

Having gone through a difficult period of transition, the Bulgarians are aware that the country's membership into the EU is not an end in itself. It means going back to the European value system and opportunities for establishing a safer and higher standard of living. No doubt, the negotiations for membership

in the EU are one of the most difficult ones Bulgaria has ever conducted in recent decades. They are very important because they stimulate the development and modernization of the Bulgarian economy and society. This is the way the country has confidently taken, being assisted by the EU member states, in the firm belief that Bulgaria needs Europe and Europe needs Bulgaria.

Fig. 8. Protected Natural Scenery in Bulgaria (2003)

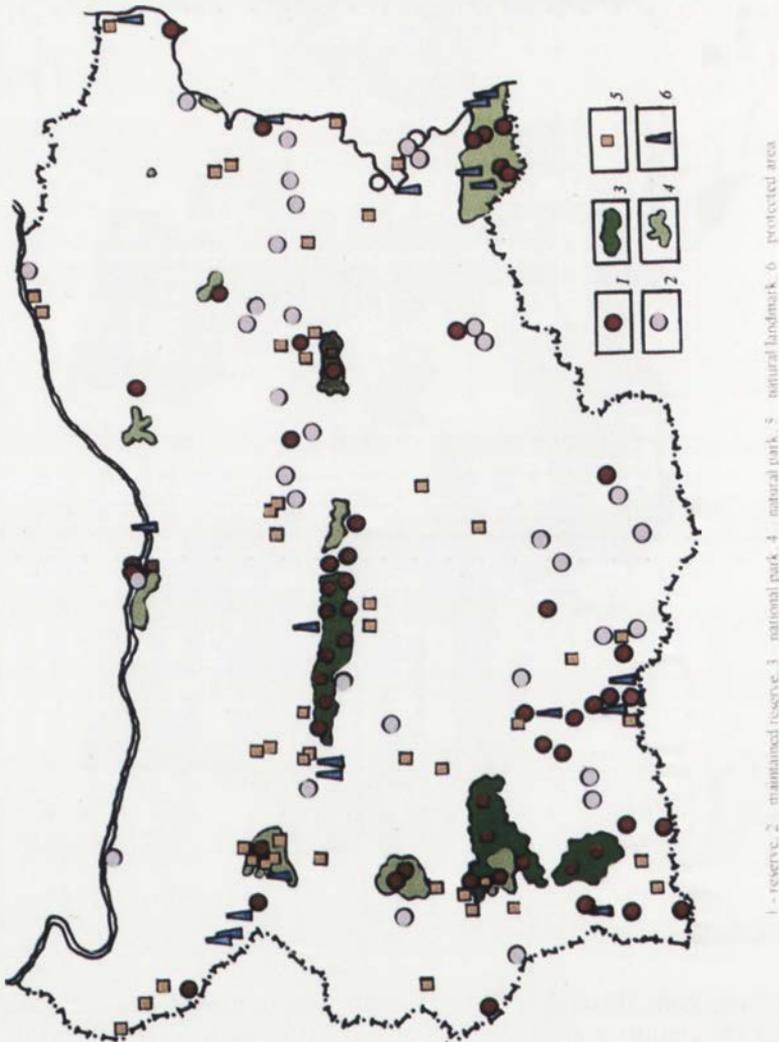
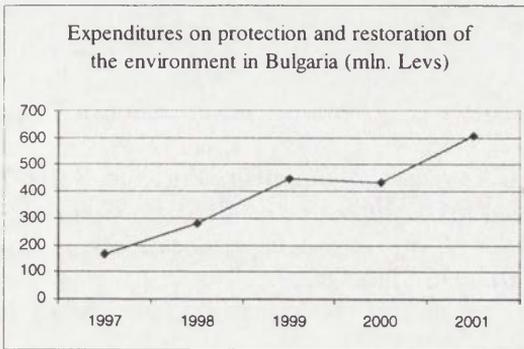
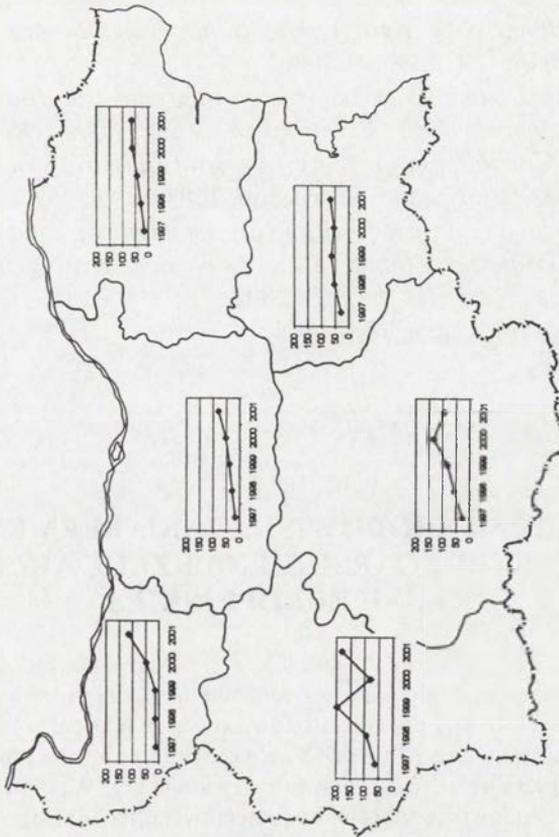


Fig. 9. Expenditures on protection and restoration of the environment in Bulgaria



Source for information: *Regions and districts in Bulgaria 1997-2001*, Sofia, 2003

Fig. 10. Expenditures on protection and restoration of the environment by planning regions



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Streszczenie

OCHRONA ŚRODOWISKA JAKO ELEMENT POLITYKI BUŁGARSKIEJ NA RZECZ AKCESJI DO UNII EUROPEJSKIEJ

Ochrona środowiska w Bułgarii posiada stuletnie dzieje i tradycje. Bułgaria zaczęła prowadzić konsekwentną politykę środowiskową, w oparciu o jasno wyznaczone cele, na przełomie lat 60-tych i 70-tych XX w. Działania związane z ochroną środowiska są prowadzone przez różne ministerstwa i departamenty. W 1990 r. zostało utworzone Ministerstwo Środowiska (obecnie przemianowane na Ministerstwo Środowiska i Zasobów Wodnych), które realizuje politykę środowiskową rządu.

Poprawa jakości środowiska w Bułgarii jest jednym z głównych wyzwań podczas negocjacji z UE. W okresie przejściowym wykonuje się znaczną pracę w zakresie zarówno ochrony flory i fauny, ochrony czystości środowiska, jak i ustawodawstwa środowiskowego.

Proces akcesyjny Bułgarii do UE oznacza przyjęcie i dostosowanie odpowiedniej polityki i norm w sprawach politycznych, gospodarczych, społecznych i innych, w tym ochrony środowiska. Bułgaria i UE podpisały umowę akcesyjną w 1993 r., która weszła w życie w 1995 r. W marcu 2000 r. rozpoczęły się negocjacje w sprawie członkostwa Bułgarii w UE. Pomyślna realizacja celów i priorytetów związanych ze środowiskiem przyczyni się do ich pomyślnego zakończenia do maja 2004 r., co umożliwi krajowi uzyskanie pełnego członkostwa UE na przełomie 2007 i 2008 r. Przed majem 2003 r. rozpoczęły się negocjacje na temat 26 z 31 rozdziałów i już się zakończyły odnośnie 24 z nich.

Negocjacje na temat rozdziału 22 „Środowisko” rozpoczęły się 27 lipca 2001 r. i pod koniec czerwca 2003 r. zmierzały ku końcowi. Bułgaria czyni wszystko co możliwe dla pokonania przeszkód wynikłych podczas procesu unifikacji ze stosownymi odpowiednikami unijnymi strategii, sposobów podejścia i norm w dziedzinie środowiska. Bułgaria wypełnia swoje zobowiązania, sformułowane w wielu umowach i porozumieniach dwu- i wielostronnych, jak również ratyfikowanych konwencjach dotyczących zagadnień środowiskowych. Równocześnie poczyniono wysiłki dla zharmonizowania ustawodawstwa poprzez przyjęcie nowych ustaw i aktów normatywnych. Są one zgodne z wymaganiami i kryteriami UE, zatwierdzonymi podczas spotkania na szczycie w Kopenhadze (1993).

Aby spełnić kryteria UE i zakończyć negocjacje, zachowując wyznaczone terminy, rząd bułgarski wypracował ogólnonarodową „Strategię odnośnie przyspieszenia negocjacji na temat przystąpienia Bułgarii do UE” (2002). Jej priorytety środowiskowe są zgodne z krokami i zadaniami nakreślonymi w „mapie drogowej”, dotyczącej przygotowania Bułgarii do pełnego członkostwa, zatwierdzonej przez Radę Europejską w Kopenhadze w 2002 r.

Dla zachowania naturalnego bogactwa kraju i poprawy jakości środowiska potrzeba dużej ilości środków finansowych. W ostatnich latach wzrosły nakłady na ochronę środowiska. Znaczne dysproporcje są zauważalne pomiędzy różnymi regionami. W roku 2001 regiony północno-zachodni i południowo-zachodni odznaczyły się wysokim udziałem inwestycji środowiskowych (Rys. 10). Można to przypisać ważnym pracom wykonanym dla podniesienia bezpieczeństwa elektrownii atomowej Kozłoduj i poprawy jakości środowiska w najbardziej rozwiniętym gospodarczo regionie południowo-zachodnim.

Pragnąc spełnić wymogi i normy UE odnośnie środowiska, Bułgaria wykorzystuje wszelkie możliwości uzyskania środków finansowych od międzynarodowych organizacji i instytucji, z funduszy przedakcesyjnych UE, itp. Na przykład, Bułgaria podobnie jak Polska wykorzystuje umowy o konwersji długów publicznych za inwestycje w ochronę środowiska (public debt-for-environment swaps) (umowa ze Szwajcarią). Bardzo ważne dla Bułgarii jest wsparcie finansowe w ramach programów UE PHARE, ISPA i SAPARD, obejmujących działania w zakresie ochrony środowiska. Jeśli chodzi o alokację grantów z funduszy przedakcesyjnych, to Bułgaria znajduje się na trzecim miejscu po Polsce i Rumunii.

„Mapa drogowa”, odnośnie przygotowania Bułgarii do pełnego członkostwa w UE, obrazuje również wzrost funduszy przedakcesyjnych. Jak to proponowała Komisja Europejska, państwa członkowskie UE zwiększą je (wynoszące obecnie ok. 300 mln rocznie) o 20% w 2004 r., o 30% w 2005 r., oraz o 40% w 2006 r. Zarówno w perspektywie krótkoterminowej jak i długoterminowej Bułgaria musi skupić swoją uwagę na inwestycjach dotyczących środowiska i jego zarządzaniu, oraz wprowadzaniu ustawodawstwa unijnego.

Członkostwo Bułgarii w UE nie stanowi samo w sobie jakiegoś etapu końcowego. Oznacza powrót do europejskiego systemu wartości i możliwości zaprowadzenia bezpieczniejszego i wyższego standardu życia. Nic więc dziwnego, że negocjacje w sprawie członkostwa w UE należą do najtrudniejszych, jakie Bułgaria kiedykolwiek prowadziła w ostatnich dziesięcioleciach. Są one bardzo ważne, ponieważ pobudzają rozwój i modernizację gospodarki i społeczeństwa w Bułgarii. Jest to droga przyjęta przez ten kraj z ufnością, a państwa członkowskie UE mu w niej towarzyszą, mając mocne przekonanie, że Bułgaria potrzebuje Europy, a Europa potrzebuje Bułgarii.

ГОРОДА БЕЛАРУСИ В ЕВРОПЕЙСКОЙ СИСТЕМЕ РАССЕЛЕНИЯ

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Города являются интегралами человеческой деятельности. История городов и история развития человеческого общества неотделимы друг от друга. Города были и являются важнейшими структурными элементами большинства цивилизаций, как старого, так и нового света. Повышение роли городов в жизни общества сопутствовало человечеству на протяжении всей его истории. С развитием цивилизации повышалась роль городов, распространялись городской образ жизни и городская культура. Но только с начала XIX в. наблюдается значительное усиление концентрации населения в городах. По оценкам, в 1800 г. городское население мира составляло около 50 млн. человек (5,1% всего населения мира). С 1800 по 1900 гг. численность городского населения увеличилась до 220 млн. человек. Однако в городах в начале XX века проживало всего 13,3% жителей Земли. Уровень урбанизации в этот период в большинстве стран не превышал 10-20%. В больших городах (более 100 тыс. чел.) проживало 5,5% всего населения мира и чуть более 40% его горожан (табл. 1).

Таблица 1. Динамика городского населения мира

Годы	Население мира, млн. человек	Городское население, млн. чел.	Доля городского населения, %	Доля больших городов (более 100 тыс.) в населении мира, %	Доля больших городов (более 100 тыс.) в городском населении, %
1800	978	50	5,1	1,7	56,3
1850	1262	80	6,3	2,3	38,3
1900	1650	220	13,3	5,5	40,9
1950	2520	738	29,3	13,1	43,6
1970	3697	1353	36,6	19,0	51,0
2000	6158	2926	47,5	39,0	70,0

В XX веке темпы роста городского населения значительно возросли и к 1950 г. в городах мира проживало уже 738 млн. человек (29,3% населения Земного шара). Наиболее высоко урбанизированным регионом в этот период была Северная Америка (64%). Самый низкий уровень

урбанизации был в странах Африки (13%). В этот период усилилась концентрация городского населения в больших городах, которые постепенно становились основными центрами расселения, и заметно повышалась их роль в развитии общества. Общее число больших городов в 1950 г. составило около 1000, а доля проживающего в них населения от мирового демографического потенциала превысила 13%.

В 50-е гг. XX столетия в связи с резким увеличением абсолютных и относительных темпов роста городского населения начался современный этап развития мировой урбанизации [1]. Важнейшей особенностью урбанизационных процессов на современном этапе в связи с концентрацией населения в больших городах явилось возникновение новых форм городского расселения – агломераций и мегалополисов. Этот процесс, изначально получивший широкое распространение в промышленно развитых странах, в настоящее время приобрел глобальный характер. В целом, за последние 50 лет численность городского населения мира выросла в 4 раза. Его доля в демографическом потенциале планеты к концу XX века составила около 50%. Однако мозаичность государств современного мира по уровню социально-экономического развития свидетельствует о том, что процессы урбанизации в различных регионах Земного шара имеют свои особенности (табл. 2).

Таблица 2. Урбанистическая структура регионов мира в 2000 г.

Регионы и страны	Численность городского населения мира, млн. чел.	Доля городского населения, %	Число городов - миллионов	Число мега-городов
Мир в целом	2926	47,0	320	24
Европа	548	76,0	62	2
Азия	1408	37,0	137	14
Африка	310	38,0	34	2
Сев. Америка	237	77,0	39	2
Лат. Америка	401	75,0	43	4
Австралия и Океания	22	71,0	5	-

Как видно из представленных данных, пространственная дифференциация урбанистической структуры в современном мире очень велика. Наибольшим удельным весом городского населения характеризуются страны Северной Америки и Европы. Однако если США и Канада находятся почти на одном уровне урбанизации, то страны Европы по этому показателю значительно различаются. Наиболее высоко урбанизированными европейскими государствами являются Великобритания и Германия. В пределах этих двух государств находится почти одна треть европейских городов-миллионеров. Для большинства

стран Европы характерны высокие не только количественные, но и качественные параметры урбанизации, связанные с развитием городской среды и уровнем жизни населения. Большинство высоко развитых государств Европы согласно стадийной концепции Дж. Джиббса [2], находятся на пятой стадии урбанистической эволюции, для которой характерны процессы субурбанизации и рурбанизации. Некоторые из них в настоящее время перешли на этап реурбанизации, характеризующийся возвращением центральных функций в ядра агломераций и возрождением центров крупных городов. Однако в конкретных исторических условиях в зависимости от уровня социально-экономического развития региона время протекания отдельных стадий урбанизации может быть различным. В связи с этим нами предлагается схема эволюции урбанизации как глобального социально-экономического процесса по основным регионам мира (табл. 3).

Таблица 3. Эволюция глобальной урбанизации по основным регионам мира

Типы стран	Стадии урбанизации				
	1	2	3	4	5
Развитые страны	+	+	+	++	+++
Развивающиеся страны	+	++	+++	++	*
Наименее развитые страны	+	++	*	*	*

Стадии урбанизации: 1 - возникновение городов; 2 - интенсивный рост численности городского населения; 3 - сокращение численности сельского населения; 4 - рост агломераций; 5 - деконцентрация городского населения.

Степень развития фазы городского населения: +++ - явление доминирует; ++ - сильно выражено; + - слабо выражено; * - отсутствует.

В странах Центральной и Восточной Европы урбанизационные процессы, хотя и со значительным опозданием, тоже вступили в новый этап своего развития. В странах этого региона, в том числе и Республике Беларусь, появляются новые тенденции. Это снижение общей интенсивности переселений; уменьшение миграции из села в город; замедление процесса концентрации населения в больших городах; сокращение не только темпов, но и абсолютных величин прироста населения в больших городах. Переход этой группы стран на последний, пятый этап развития городского расселения, характерный для постиндустриального общества, связан с рядом причин объективного характера и, прежде всего, с темпами социально-экономического развития.

В каждой стране в силу особенностей ее исторического, социально-экономического и демографического развития, степени освоения территории и развитости транспортной сети города и системы расселения не остаются неизменными, а постепенно видоизменяются. На их трансформацию наиболее значительное влияние оказывает процесс

урбанизации, первичной ячейкой которого являются города, образующие в пределах отдельных стран системы расселения. И как национальные экономики через международную интеграцию образуют региональные экономические союзы и в целом глобальное мировое хозяйство, так национальные системы расселения через процессы агломерирования и метрополизации ведут к созданию урбанизированных зон, районов, мегалополисов, вплоть до ойкуменополиса. В связи с этим города стран Европы в процессе развития урбанизации постепенно становились опорными центрами региональных систем расселения и вместе с важнейшими транспортными магистралями формируют единую европейскую систему расселения.

Место городов Беларуси в европейской системе расселения обусловлено комплексом факторов, и, прежде всего, особенностями их исторического развития, формированием территории, её экономико-географическим и транспортным положением, демографической и экологической ситуацией в стране.

Многообразие природных условий, географические особенности территории Беларуси обусловили специфику формирования городских населенных пунктов на территории страны. Положенный в основу периодизации развития системы городского расселения на территории республики комплексный подход, учитывая некоторые аспекты социально-экономического и политического развития общества, позволил выделить следующие 8 этапов формирования городских поселений:

1. возникновение первых городских населённых пунктов (IX-XI вв.);
2. формирование городских поселений в период раннего средневековья (XII-начало XIII вв.);
3. развитие городов и формирование местечек в период Великого Княжества Литовского (XIII - первая половина XVI вв.);
4. городские поселения Беларуси в составе Речи Посполитой (1569-1795 гг.);
5. развитие белорусских городов в составе Российской империи (1795-1917 гг.);
6. города и городские посёлки Беларуси в составе Советского Союза в довоенный период (1917-1941 гг.);
7. рост и развитие городских населённых пунктов Беларуси в период послевоенной индустриализации и урбанизации СССР (1944-1991 гг.);
8. формирование системы городского расселения Республики Беларусь как суверенного государства (1991 г. – настоящее время).

Современная территория Беларуси была заселена людьми около 100 тысяч лет тому назад. В 6 - 8 вв. сюда проникли славянские племена, которые частично вытеснили и ассимилировали балтов. Этим был дан первоначальный импульс формирования белорусского этноса.

Своеобразие рельефа, климатических условий и речной сети привели к возникновению и формированию на территории Беларуси достаточно густой сети поселений. Первые населённые пункты славян делились на селища и городища. При постройке городищ выбирались участки местности, наиболее защищенные природными рубежами от врагов. В условиях равнинной территории Беларуси это могли быть высокие берега рек, а также места, окруженные непроходимыми болотами. Кроме этого при строительстве городищ создавались искусственные оборонительные сооружения. На базе городищ начали возникать первые города. Важнейшим фактором возникновения и развития городов на территории Беларуси, которую в VII – IX веках занимали славянские союзы дреговичей, кривичей, радимичей, явилось нахождение их на торговом пути «из варяг в греки». Поэтому первые города размещались чаще всего на берегах рек, особенно в тех местах, где одна река впадала в другую.

Одними из самых древних городов восточных славян в пределах Беларуси были Полоцк (862 г.), Туров (980 г.), Заславль (X в.), Брест (1019 г.), Витебск (1021 г.), Браสลав (1065 г.), Минск и Орша (1067 г.), Друцк (1092 г.), Пинск (1097 г.). Территориальное размещение первых городов в данный период было обусловлено, прежде всего, выгодным экономико-географическим положением, играющим в то время на градообразование ведущую роль. Проходящие через этническую территорию Беларуси важнейшие водные и сухопутные пути того периода, на которых возникали первые города, постепенно приобретали значение главных планировочных осей.

В XIV веке в Великом княжестве Литовском в связи с расширением торговли возникла новая форма расселения – местечки. Местечки были своеобразной промежуточной формой расселения между городом и большим селом. От города местечки отличались аграрными чертами, меньшей численностью населения и отсутствием оборонительных сооружений. Главное отличие от села заключалось в том, что значительная часть населения местечек была занята ремеслом и торговлей. В процессе экономического развития многие местечки получали статус городов и даже имели Магдебургское право. Некоторые, по различным причинам, приходили в упадок и становились сёлами. К концу существования ВКЛ в пределах Беларуси был 41 город и 366 местечек.

В результате трех разделов Речи Посполитой (1772 г., 1793 г., 1795 г.) территория Беларуси была присоединена к Российской империи. В результате этого замедлилось социально-экономическое развитие городов и местечек Беларуси. Процессы урбанизации сдерживались крепостным правом и слабым развитием промышленности. До начала 60-х годов XIX столетия около 60% населения составляли крепостные крестьяне. Количество городского населения составляло немногим более 300 тысяч

человек. Белорусы не рассматривались как самостоятельный этнос, а как часть русского народа. В связи с этим проводилась политика ассимиляции белорусов. В 1839 году была ликвидирована униатская церковь. Из белорусских земель, отошедших к России, в начале XIX века было образовано четыре губернии: Минская, Могилёвская, Витебская, Гродненская, насчитывавшие 40 уездов.

Крестьянская реформа 1861 года создала предпосылки для развития капиталистических отношений. Произошла трансформация структуры сельского хозяйства. Его ведущей отраслью стало молочное животноводство. Росла доля промышленности. Наиболее распространёнными были предприятия по переработке сельскохозяйственной продукции. Значительной была доля предприятий деревообрабатывающей, стекольной, железорудной и других отраслей промышленности. Большинство предприятий было переведено на вольнонаёмный труд. С числа получивших относительную свободу безземельных крестьян промышленность получила значительный прирост рабочей силы. Развитие промышленности стимулировало расширение рынка и развитие городов.

Дальнейшее развитие городов и местечек, формирование пространственной макроструктуры находилось в тесной зависимости от путей сообщения. Главными, как и прежде, коммуникационными осями являлись водные системы (Днепра, Западной Двины, Нёмана, Буга) и грунтовые дороги, которые подразделялись в зависимости от значения на главные, поветовые, сельские и полевые. Через территорию Беларуси проходили дороги Петербург – Киев, Москва – Варшава, Рига – Полоцк и др. Таким образом, как и на предыдущих этапах развития городов, опорный каркас расселения на территории Беларуси формировался вдоль рек и грунтовых дорог.

Развитие капиталистических отношений после отмены крепостного права вело к дальнейшему усложнению рыночных отношений и требовало усовершенствования путей сообщения. Поэтому мощным фактором городского развития стало на Беларуси железнодорожное строительство. Его начало положила Петербургско-Варшавская железная дорога (1862 г.), которая прошла через Гродно. В 1866 – 1868 гг. по территории Беларуси прошла Рига – Орловская железная дорога (через Полоцк и Витебск), в 1871 г. — Московско – Брестская (Брест, Жабинка, Барановичи, Минск, Орша), в 1873 – 1879 г. — Либаво – Роменская (Молодечно, Минск, Бобруйск, Жлобин, Гомель), в 1882 – 1886 г. — Полесские железные дороги (Жабинка, Пинск, Лунинец, Гомель, а также Барановичи – Лунинец и Барановичи – Белосток), в 1902 г. - Петербургско – Одесская (Жлобин, Могилёв, Орша). Строительство железных дорог на территории страны внесло значительные коррективы на существовавший

до этого времени каркас расселения и на дальнейшее развитие основных планировочных осей. Многие города, оказавшись на железнодорожных магистралях, получили дополнительный импульс к дальнейшему экономическому развитию, поскольку именно к железным дорогам перешла ведущая роль в формировании планировочных осей. Некоторые из городских населенных пунктов, в том числе и древние, оказавшись вне строительства железных дорог, постепенно начали терять свой промышленный и демографический потенциал.

В 1897 году прошла первая всероссийская перепись населения, которая охватила и белорусские земли. По данным переписи на территории Беларуси в её современных границах проживало 6 380 тыс. человек. Уровень урбанизации был очень низким и составлял всего чуть более 10%. Почти всё городское население (около 95%) концентрировалось в 36 губернских и уездных городах. Остальные горожане были жителями заштатных городов и местечек.

К началу первой мировой войны численность городского населения Беларуси увеличилась до 925 тыс. человек, а его доля в общем числе жителей составила 13,4%. Особенно быстрыми темпами в период 1897 – 1913 гг. росло население Гомеля, который практически догнал Минск и Витебск и вместе с ними составил группу больших городов Беларуси. Увеличение числа жителей Гомеля за такой незначительный промежуток времени почти в три раза (с 36,8 до 102,1 тыс. чел.) связано с его выгодным транспортно-географическим положением. Значительно выросли за этот период также города Гродно и Брест, Полоцк и Рогачёв, однако в системе городского расселения по-прежнему доминировали города с числом жителей до 20 тысяч.

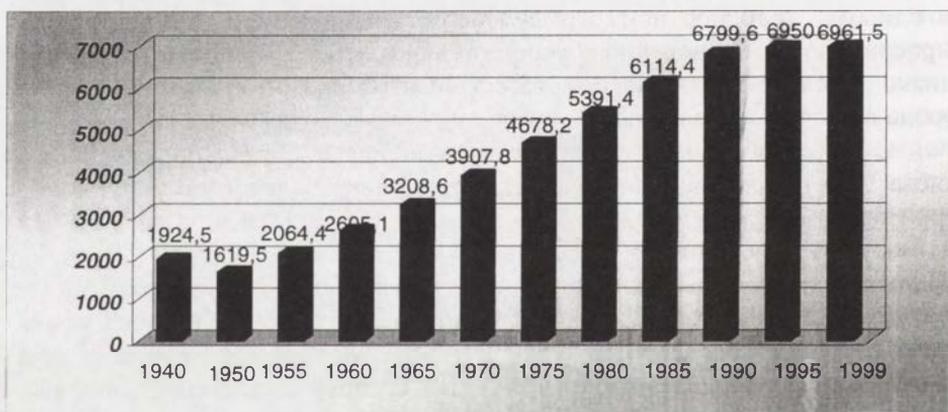
С 30 декабря 1922 года Беларусь вошла в состав образованного Союза Советских Социалистических Республик. Вследствие укрупнения территории Беларуси в 1924 и 1926 годах её площадь увеличилась до 125 491 км², а численность населения – до 4,8 млн. человек. Уровень урбанизации в это время составлял немногим больше 13%.

В 1938 г. на территории восточной Беларуси была введена новая форма городских населённых пунктов – посёлки городского типа. К ним относились городские населённые пункты, которые от города отличались главным образом меньшей численностью населения. Посёлки городского типа в свою очередь делились на городские, рабочие и курортные посёлки. Накануне второй мировой войны на территории Беларуси насчитывалось 173 городских населённых пунктов. Из них 65 относилось к категории городов, 108 имели статус городских поселков. Однако республика оставалась практически аграрной страной. Хотя к этому времени и было уже сформировано более 80% из существующих сегодня городских поселений, однако доля городского населения в общей

численности жителей Беларуси составляла всего 21%.

Великая Отечественная война нанесла непоправимый урон народному хозяйству страны. Практически все городские населённые пункты были разграблены и разрушены, значительная часть промышленных предприятий была вывезена в Германию. Демографический потенциал страны снизился почти на одну треть. Если в начале войны на территории страны насчитывалось 9,2 млн. человек, то к 1945 году осталось всего 6,2 млн. человек [3, с.17]. Главной особенностью демографического развития Беларуси в послевоенный период стал быстрый абсолютный и относительный рост городского населения. Довоенная численность городского населения была восстановлена к 1954 году, а население страны в целом, к 1972 году. На восстановление довоенного демографического потенциала Беларуси в целом потребовалось около 30 лет, городского населения – 10 лет. Однако демографические последствия войны, носящие сложный циклический характер, влияли на динамику населения и после восстановления её довоенной численности. В первую очередь эти последствия оказывали влияние на процессы рождаемости и смертности, половозрастную структуру населения и, как следствие, на динамику численности (рис.1).

Рис.1. Динамика численности городского населения Республики Беларусь (1940 – 1999 гг.), тыс. чел.



Изменение численности городского населения происходило под влиянием трёх факторов: 1) естественного прироста; 2) механического прироста и 3) административно-территориальных преобразований. Рассчитанные нами данные за 1959 – 1999 гг. по удельному весу вышеназванных факторов свидетельствуют о ведущей роли механического прироста в росте численности городского населения

Беларуси. Общий прирост городского населения за анализируемый период составил 4 514,4 тыс. человек. На долю механического прироста и административно-территориальных преобразований пришлось 2 495,3 тыс., что составило 55,3% общего прироста городского населения. Более быстрый рост городского населения за счёт миграции связан с ускоренными темпами развития промышленного производства в послевоенный период, текущие нужды которого в трудовых ресурсах могли удовлетворяться наличием избыточной рабочей силы в сельском хозяйстве страны. За счёт естественного прироста городское население Беларуси увеличилось на 2 019, 1 тыс. человек, что составило 44, 7% от общего прироста (табл.4).

Таблица 4. Источники роста городского населения Беларуси в 1959 – 1999 гг.

Население (прирост)	1959 – 1970		1970 - 1979		1979 – 1989		1989 - 1999		1959 – 1999	
	Тыс. чел.	%								
Общий	1443,5	100	1343,7	100	1407,1	100	320,1	100	4514,4	100
Естественный	535,7	37,1	550,6	41,0	721,4	51,3	211,4	66,0	2019,1	44,7
Механический	907,8	62,9	793,1	59,0	685,7	48,7	108,7	34,0	2495,3	55,3

Источник: Министерство статистики и анализа Республики Беларусь.

Исходя из особенностей и темпов послевоенного роста численности городского населения Беларуси, можно выделить четыре демографических периода (фазы) в его развитии:

1. 1950-1959 гг. – период бурного компенсаторного демографического роста городского населения (среднегодовые темпы прироста в 1950 - 1954 гг. – 5,25%, в 1955-1959 гг. – 4,65%);
2. 1960-1979 гг. – период постепенного снижения среднегодовых темпов прироста населения (с 3,50% в 1960-1964 гг. до 2, 55% в 1975-1979 гг.);
3. 1980-1989 гг. – период незначительного увеличения среднегодовых темпов прироста (с 2,60% в 1980-1984 гг. до 3,00% в 1985-1989 гг.);
4. 1990-1999 гг. – период резкого снижения среднегодовых темпов прироста (с 0,6 % в 1990-1994 гг. до 0,1 % в 1995-1999 гг.).

В 1990-1994 гг. среднегодовые темпы прироста городского населения Беларуси по сравнению с предыдущим периодом снизились в пять раз и составили всего 0,6%. Этому способствовали совпавшие по времени последствия аварии на Чернобыльской АЭС, резкие политические, экономические и социальные преобразования. Вследствие этих трансформационных процессов резко ухудшилась демографическая ситуация. Снижение рождаемости и рост смертности привели к тому, что в 1994 году в Беларуси впервые за всю её историю демографического развития произошло абсолютное уменьшение общей численности населения. До этого времени в стране отмечался рост общей численности населения, который происходил за счёт опережающего роста горожан при

одновременном уменьшении численности сельского населения. В 1995-1999 гг. среднегодовые темпы снижения городских жителей составили всего +0,1%.

В перспективе, о чем свидетельствуют результаты демографического прогноза, в Беларуси сохранится тенденция убыли населения. За 1998-2015 гг. численность сельского населения сократится почти на 25%. Городское население будет увеличиваться, однако более низкими темпами, чем в предыдущие годы. Основным фактором роста городов будет миграция, которая не только компенсирует естественную убыль населения, но и обеспечит его прирост. К 2005 г. доля городского населения в демографическом потенциале страны составит 72,9%, к 2015 г. – 76,1% [4, с.10].

Таким образом, современная система городского расселения Беларуси сформировалась в результате действия сложного комплекса природных, исторических и социально-экономических факторов. По данным на 1.01.2002 г. система городского расселения страны представлена 213 городскими населенными пунктами, из которых 110 являются городами и 103 посёлками городского типа. Современная система городского расселения Беларуси характеризуется довольно значительной густотой, которая в среднем по республике составляет около 1 тыс. км² (0,98). Среднее расстояние между городскими населёнными пунктами в стране составляет 31 километр, между сельскими – около 3 км. Средняя плотность населения республики равна около 48 человек на км², что значительно ниже, чем в странах Европейского Союза (110 чел/км²). Территория Беларуси характеризуется довольно значительной транспортной обслуженностью территории. Из 9 трансъевропейских транспортно-коммуникационных коридоров три непосредственно затрагивают интересы Республики Беларусь. Рассчитанные нами коэффициенты Энгеля и Гольца свидетельствуют, что транспортная обслуженность системы городского расселения страны довольно высокая. В целом по стране на 100 км² площади территории приходится около 3 км железных дорог. Непосредственно на них или на незначительном удалении находится около 80% всех городских населенных пунктов страны.

В послевоенный период произошли значительные изменения в урбанистической структуре городского расселения страны. По данным последней переписи в городах проживало 93% городского населения, в посёлках городского типа – 7%. Около половины всего городского населения (49,3%) концентрировалось в столице республики и областных центрах. Более 25% (26,3%) горожан были жителями городов с численностью населения от 50 до 250 тысяч жителей. Каждый четвёртый горожанин страны являлся жителем малого городского поселения (24,4%).

Таким образом, всё городское население Беларуси распределяется по основным категориям городов неравномерно (табл. 5).

Таблица 5. Распределение городских населенных пунктов Республики Беларусь по числу жителей

С числом жителей, тыс. чел.	1939 г.		1959 г.		1999 г.	
	Число поселений	В них жителей	Число поселений	В них жителей	Число поселений	В них жителей
Всего	173	1854,8	184	2480,5	212	6955,9
до 3	53	107	45	106,2	50	90,6
3 – 4,9	57	215,8	57	233,2	25	94,4
5 – 9,9	33	222,3	50	331,5	50	387,2
10 – 19,9	14	205,2	15	216,3	47	643,6
20 – 49,9	11	375,6	7	219,7	16	482,0
50 – 99,9	2	183,5	6	425,8	9	615,0
100 – 249,9	3	545,4	3	438,3	9	1209,3
250 – 499,9	0	0	0	0	5	1759,8
500 – 999,9	0	0	1	509,5	0	0
1 млн. и более	0	0	0	0	1	1673,8
Города	65	1507,7	69	2032,9	104	6493,2
до 3	2	5,1	4	9,8	2	5,1
3 – 4,9	11	44	8	34,8	1	4,5
5 – 9,9	23	165	25	178,7	18	146,4
10 – 19,9	13	189,1	15	216,3	43	597,1
20 – 49,9	11	375,6	7	219,7	16	482,0
50 – 99,9	2	183,5	6	425,8	9	615,0
100 – 249,9	3	545,4	3	438,3	9	1209,5
250 – 499,9	0	0	1	509,5	5	1759,9
500 – 999,9	0	0	0	0	0	0
1 млн. и более	0	0	0	0	1	1673,8
Городские посёлки	108	347,1	115	447,6	108	462,7
до 3	51	101,9	41	96,4	48	85,5
3 – 4,9	46	171,8	49	198,4	24	89,9
5 – 9,9	10	57,3	25	152,8	32	240,8
10 – 19,9	1	16,1	0	0	4	46,5

Источник: Министерство статистики и анализа Республики Беларусь

Около 70% городского населения Беларуси проживает в больших городах страны, число которых за послевоенный период выросло с 3 до 15, а численность населения – с 947 тыс. чел. до 4640 тыс. человек. Все это свидетельствует о высоких темпах урбанистической концентрации населения Беларуси во второй половине XX века (табл.6).

Таблица 6. Уровень концентрации городского населения Республики Беларусь

Годы	Кол-во больших городов	Численность населения в них, тыс. чел.	Доля в численности всего населения, %	Доля в численности городского населения, %
1939г.	3	543	6,1	29,3
1959г.	4	947	11,8	38,2
1970г.	9	2207	24,5	56,5
1979г.	10	3165	33,2	60,2
1989г.	12	4194	41,1	62,8
1999г.	15	4640	46,2	66,7

Источник: рассчитано автором по данным Министерства статистики и анализа Республики Беларусь.

Рост числа больших городов в послевоенный период, стремившихся полнее охватить своей сетью территорию страны, качественно изменил систему расселения. Однако большие города по территории страны размещены неравномерно. Для того, чтобы определить площадь территории Беларуси, находящейся под влиянием больших городов, используем известную формулу В.А. Шупера [5]:

$$R = \sqrt[3]{N/4}, \text{ где}$$

R – зона влияния города;

N – население города.

Исходя из произведенных нами расчётов, зона влияния всех больших городов на прилегающую территорию составляет около 80 тыс. км², причем почти четверть этой площади составляет зона влияния города Минска. Даже если взять во внимание средние города (от 50 до 100 тыс. жителей), радиус воздействия которых составляет не более 25 км, то все равно меньше половины площади территории Беларуси попадает под влияние средних и больших городов. Эта особенность городского расселения страны создает значительную контрастность в возможностях остальных жителей, проживающих за пределами среднего радиуса влияния на прилегающую территорию, использовать научный, культурный и социально-экономический потенциал городов этой категории.

Формирование рисунка современной системы расселения на территории Беларуси в значительной степени было обусловлено административно-территориальным устройством страны. В результате этого большинство областных центров оказались в эксцентрическом положении по отношению к подведомственной им территории, а значительная часть населения удаленной от центров областей на 200 и более километров (табл. 7).

Таблица 7. Условия доступности областных центров Республики Беларусь

Области	Территория тыс. км ²	Территория за пределами среднего радиуса		Максимальное удаление от центра		Население за пределами среднего радиуса, %
		тыс. км ²	%	км	В часах при 30км/ч	
Брестская	32,8	22,2	67,5	270	9,0	69,5
Витебская	40,1	16,9	42,2	250	8,3	35,9
Гомельская	40,4	20,4	50,5	240	8,0	37,0
Гродненская	25,0	10,7	42,8	220	7,3	42,5
Минская	40,2	12,0	30,0	180	6,	21,3
Могилёвская	29,1	7,4	25,5	190	6,6	37,0
Итого	207,6	89,4	41,6	-	-	39,7

Источник: Министерство статистики и анализа Республики Беларусь.

Выявленные нами особенности современной системы расселения Беларуси обусловили своеобразие сложившегося на протяжении многих веков урбанизированного каркаса территории страны. Урбанизированный каркас формировался устойчивыми во времени и пространстве осями, большая часть которых возникла довольно давно. На современном этапе социально-экономического развития страны система урбанизированных осей (коммуникационных коридоров) включает в себя автомобильные, железнодорожные и водные пути сообщения, нефте- и газопроводы. Урбанизированные оси связывают практически все средние и большие города Беларуси, среднее расстояние между которыми составляет около 65 км.

Другим важнейшим компонентом урбанизированного каркаса Беларуси являются его узлы. Это, как правило, большие и крупные города, большинство из которых расположено на пересечении урбанизированных осей, что обеспечивает этим городам условия для экономического роста. На развитие урбанизированного каркаса республики существенное влияние оказывает национальная экологическая сеть и последствия Чернобыльской катастрофы, в результате которой радиоактивно загрязненными оказались около 20% территории страны. Формирование экологической сети устанавливает ряд ограничений и приоритетов развития, как для опорных городов системы расселения, так и для транспортных коммуникаций. В связи с этим природный каркас, основу которого образуют особо охраняемые территории, выступает в качестве противовеса урбанизированному каркасу и вместе с ним образует планировочный каркас страны [6].

Приведённые выше основные исторические, социально-экономические, демографические и экологические характеристики городского расселения Беларуси и его транспортной обеспеченности

свидетельствуют, что городские населённые пункты по территории страны распределены довольно равномерно и в целом экистические условия республики являются благоприятными для развития экономических, социальных, культурно-бытовых и других видов межпоселенных связей в пределах экономического пространства Европы. В значительной степени благоприятствует интеграции Беларуси в европейскую систему расселения экономико-географическое положение страны. Республика расположена на пересечении основных коммуникационных путей Европейского континента «Запад-Восток» и «Север-Юг». Беларусь, на водоразделе трёх морей – Балтийского, Черного и Белого. Беларусь, вместе с другими странами Центральной и Восточной Европы, расположена между крупнейшей по площади территории страной мира Россией и государствами Западной Европы. По размерам территории она занимает 13 место среди стран Европы или 2% ее площади. По этому показателю страна сравнима с Великобританией, Польшей, Болгарией. По численности населения – с Нидерландами, Бельгией, Швецией. При достаточной компактности территории республика имеет большую протяженность границ – 2969 км. Она граничит с 5 государствами. Протяженность границы с Россией составляет 990 км, с Украиной - 975 км, Литвой - 462 км, Польшей - 399 км, Латвией - 143 км. Пограничные с Республикой Беларусь государства имеют разные уровни социально-экономического развития, что в определенной мере влияет на формирование системы расселения Беларуси.

Таким образом, развитая сеть городских поселений Республики Беларусь и их выгодное экономико-географическое и транспортное положение способствует интеграции страны в систему расселения Европы и развитию Беларуси в контексте европейской цивилизации.

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Summary

TOWNS OF BELARUS IN EUROPEAN SETTLEMENT SYSTEM

The place of Belarus' towns in the European settlement system is conditioned by specificity of their historical growth, the way of creating the country's territory, its geographic location, economic and transport situation, as well as demographic and ecological features.

A complex approach to periodic division of urban settlement in Belarus has allowed distinguishing 8 stages:

1. Appearance of first urban settlements (9th c. – 11th c.);
2. Creation of urban settlements in the early Middle Ages (12th c. – early 13th c.);
3. Growth of larger towns and creation of small towns in the period of the Grand Duchy of Lithuania (13th c. – first half of 16th c.);
4. Belorussian urban settlements within the Noble Republic (the years 1569-1795);
5. Growth of Belorussian towns within the Russian Empire (the years 1795-1917);
6. Towns and urban settlements of Belarus within the USSR in the pre-war period (the years 1917-1941);
7. Growth and development of urban settlements in Belarus in the period of post-war industrialisation and urbanisation of the USSR (the years 1944-1991);
8. Creation of the urban settlement system in the sovereign state of Republic of Belarus (1991 – until now).

Based on the current statistics and materials from censuses, dynamism of urban population size has been analysed.

The contemporary urban settlement system in Belarus is affected by natural, historic and socio-economic factors. According to the data as of 1st Jan. 2002, the system consists of 213 localities, out of which 110 are towns and 103 are urban settlements. The urban skeleton of Belarus has been created based on axes established in time and space (communication corridors), including routes of car, railway, and water communication, as well as gas and oil pipes.

Belorussian urban settlements are relatively evenly distributed throughout the country, and their favourable economic, geographic and transport conditions favour its integration with the system of the European settlement and affect development of Belarus in the context of the European civilisation.

Journal of Research in Personality

DESCRIPTION OF THE RELATIONS BETWEEN RUSSIA AND THE EUROPEAN UNION

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Agreement – based relations

Until 1990s no relations between Russia and the European Communities were based on agreements. This situation resulted from a lack of agreement on mutual recognition between the Council for Mutual Economic Aid and the European Communities. The appropriate agreement was signed no sooner than in 1988 and it provided an opportunity to enter into bilateral contracts. A number of countries of the former Council signed association agreements with the European Communities, which were to be a step to membership. The countries of the former USSR (except Estonia, Lithuania and Latvia) signed "Agreements on partnership and cooperation" in the middle of 1990s, e.g. Ukraine and Moldova in 1994 and Belarus in 1995.

"Agreement on Partnership and Cooperation establishing a partnership between the European Communities and their Member States on the one part, and the Russian Federation on the other part" was signed on Corfu Island on 24 June 1994.¹

After the ratification process, the act came into force on 1 December 1997, replacing "The temporary agreement between the European Common Market and the Union of Soviet Socialist Republics" signed in 1989.

The purpose of "Agreement on Partnership and Cooperation" was to increase significantly a degree of cooperation in the area of politics and economy. The range of agreement is very broad and includes such spheres as political cooperation, jurisdiction and internal affairs – particularly problems of illegal immigration, drugs smuggling and organised crime – science and technology, energy, transport, protection of the environment, culture, trade and investments.

¹ *Dziennik Ustaw Wspólnot Europejskich*, no L327, 28 November 1997.

In order to facilitate the dialogue, the institutional framework for cooperation was established, namely²:

- Summit meetings of President of Russia, President of the Council of the EU and President of the European Commission (twice a year),
- Council of Cooperation consisting of foreign affairs ministers of the EU member states and Russia (once a year),
- Cooperation Committee consisting of officials and experts,
- Parliamentary Committee of Cooperation consisting of deputies to the Russian Duma and to the European Parliament.

Additional meetings take place within the so-called EU three, i.e. representatives of the state holding presidency in the EU, the Council of the EU and the state which is next to hold presidency, frequently accompanied by a representative of the European Commission and a Russian delegate of an appropriate rank. There are also meetings of working groups (15) dealing with specific areas of cooperation.

In the following years a number of sector arrangements and bilateral contracts based on the Agreement were signed with particular states of the EU.³

According to the Agreement, the EU and Russia resolved to gradually remove barriers in goods and services trade, grant the Most Favoured Nation Clause, and possibly create a free trade area in the future.

Perspectives of the development of relationships were to a large extent determined in two documents signed after the Agreement had come into force. At the summit of the European Council in Cologne in 1999, the EU signed "Common Strategy of the European Union to Russia." It is worth mentioning that this document represents a new kind of instrument within Common Foreign and Security Policy, which was used for the first time by virtue of the Treaty of Amsterdam.⁴

The "Strategy" describes the EU perspective how mutual relations will be shaped in the future. The most important elements of the "Strategy" are⁵:

1. Facilitating democracy of the rule of law and public institutions in Russia;
2. Incorporating Russia into European economic and social area;
3. Cooperation aiming at ensuring safety and stabilisation in Europe and in the world;
4. Common actions concerning challenges on the European continent, such as energy and nuclear safety, protection of health and environment, struggle

² Dziewulski, R., *Stosunki między Unią Europejską a Rosją w kontekście rozszerzenia UE*, Office of European Integration Committee, *Biuletyn Analiz*, no 9, 2002, p. 69.

³ E.g. agreements on textile articles trade (1998) or on cooperation in the field of science and technology (2000) – Dziewulski, *Stosunki...*, p. 70.

⁴ Dziewulski, p. 70.

⁵ Dziewulski, p. 70.

with washing illegal money, regional and trans-border cooperation, and developing infrastructure.

It is worth noticing that thus identified general objectives of the "Strategy" were described also through methods and means of their implementation. However, the fact that ways and mechanisms of financing these activities, apart from limited and already employed methods, were not described, can be considered a weakness of the "Strategy". Moreover, it seems that the "Strategy" is based on not always realistic assumptions concerning development of the situation and shaping policy in Russia.

On the part of Russia, a document of similar character: "Medium – term strategy of developing relations between the Russian Federation and the European Union in the years 2000 – 2010" was delivered to the EU on 22 October 1999. The document identifies the most important goals, which Russia intends to achieve in relations with the EU. The necessity to preserve freedom in determining and implementing internal and external policy in Russia was emphasised in the document. This will enable to attain geopolitical objectives connected with the status of Russia as regional power, especially on the territory of the former USSR.⁶ Much place in the "Medium – term strategy" is devoted to economic issues, particularly to such questions as:⁷

- Development of mutual trade and investments – chapter 3 of the document is dedicated to the issue;
- Cooperation in the area of finances – chapter 4;
- Protection of Russia's interests in the context of the EU enlargement and membership of Middle and Eastern Europe countries – chapter 5;
- Development of cooperation infrastructure all over Europe – chapter 6.

In generally determined areas of cooperation many specific activities were mentioned, e.g. in chapter 3 a need of examining with the EU experts the issue of starting negotiations about free trade area.

Relations in the real sphere

In recent years a degree of economic relations between the EU and Russia has been significantly influenced by a currency crisis that took place in 1998 in Russia. The following years brought substantial improvement in the economic situation. Table 1 presents the data concerning basic economic indicators.

⁶ Dziewulski, p. 70.

⁷ *Polska – Rosja, dwustronne stosunki gospodarcze*, Department of Economic Foreign Relations of the Ministry of Economy, Warsaw 2002, p. 4.

Table 1. Basic economic indicators for Russia in 1998 – 2002 – dynamics as compared with previous year.

	1998	1999	2000	2001	2002
Increase in GDP (%)	- 4.9	5.4	9.0	5.0	4.3
Budget deficit (%GDP)	- 3.6	- 1.5	1.4	3.0	1.5
Inflation (%)	27.8	36.5	20.2	18.6	15.1
Unemployment (%)	9.6	13.0	10.5	9.0	7.1
Foreign trade turnover (%)	-	- 6.1	8.8	10.7	9.1
Real income of population (%)	-	- 12.5	11.9	8.5	8.8

Source: Compiled on the basis of:

Dziewulski, R., *Stosunki pomiędzy Unią Europejską a Rosją w kontekście rozszerzenia UE*. Office of European Integration Committee, *Biuletyn Ekonomiczny* no 9, 2002 and *Ocena sytuacji gospodarczej w Federacji Rosyjskiej* Office of Commercial Counsellor of the Polish Embassy in Moscow, quoted after Goskomstat and the Ministry of Economy and Trade Development of the Russian Federation, p. 75.

Countries of the EU are the most important trade partners of Russia. The share of the group has remained on the level of about 35 % of general turnover for the last few years.⁸ Table 2 shows the data concerning this issue.

Table 2. Share of particular economic groups and countries occupying a significant position among trade partners of Russia.

	Level of turnover and indicator of share in Russian turnover			
	1999		2000	
	billion USD	% share	billion USD	% share
European Union	36.1	34.5	47.8	35.0
Commonwealth of Independent States	18.9	18.5	25.3	18.5
Central and Eastern Europe	13.1	12.8	20.4	14.9
APEC	17.3	17.0	20.8	15.3
General turnover of Russian Federation	102.0	100	136.6	100

Source: customs statistics of the Russian Federation.

In 2001 exports to the EU reached a value of over 45 billion euro and imports – 19.8 billion euro. As it is shown, the balance of trade exchange was definitely to the benefit of Russia. This tendency has occurred for many years and has even increased recently. Such a situation results from the goods structure of the exchange. The most important item in Russian exports is energy media – about 50%. The EU market receives 53% of the Russian oil exports and 62% of earth gas exports. Favourable level of prices for these raw materials caused high dynamics of exports value.⁹ Moreover, devaluation in rate of exchange

⁸ *Biuletyn Ekonomiczny*, Office of Commercial Counsellor of Polish Embassy in Moscow, no 69.

⁹ Dziewulski, R., *Stosunki...*, p. 74.

of rouble that occurred during the crisis also had a significant impact on the increase in exports value. It is estimated that the resulting increase in competitiveness of Russian goods on foreign markets actively influenced exports, particularly at the end of 1990s. As far as goods structure of the EU exports to Russia is concerned, machines and equipment have a dominant position – 38%, other industrial goods – 30%, chemical articles – 14%, food and drink – 11%.¹⁰

The EU countries belong also to the largest foreign investors in Russia. In 2002 such states as Germany, Great Britain, France, Italy, Holland, together with the U.S. and Cyprus had 75.4% share in total investments and 74.3% in direct investments.¹¹ Detailed information is presented in Table 3.

Table 3. Main foreign investors in Russia (million USD)

	Total investments	Direct investments	Other investments
USA	2728.3	1938.7	789.6
Germany	1564.0	207.3	1356.7
Gibraltar	778.8	1.4	773.4
Cyprus	766.0	280.7	485.3
Great Britain	669.1	143.7	525.4
Holland	373.7	352.7	21.0
Switzerland	354.1	41.8	312.3
France	286.0	43.0	243.0
Finland	212.0	106.2	105.8
Luxembourg	74.5	9.1	65.4

Source: Data of Office of Commercial Counsellor of Polish Embassy in Moscow.

A characteristic feature of foreign investments in Russia is a relatively low share of direct investments. Their value is estimated as far too low in comparison with the needs of Russian economy. Investing assets in trade credits and as deposits of foreign legal persons in Russian banks is considered to be more attractive financially and to protect better against investment risk due to high fluidity. High share in foreign investments of such countries as Cyprus, Gibraltar and Luxembourg is significant, as well. This phenomenon is connected with transfer of capital from Russia and its return as foreign capital.

According to the estimate from 30 September 2002 cumulated foreign investments in Russia reached 39.8 billion USD, including: direct investments – 48.7%, portfolio investments – 3.5%, and other investments – 47.8%.¹²

Transfers of capital from the EU to Russia include also financial means from support funds, particularly TACIS programme.¹³ It was launched by decision of the European Council summit in Rome, 1990. The programme aims at

¹⁰ Dziewulski, R., *Stosunki...*, p. 74.

¹¹ *Biuletyn Ekonomiczny*, Office of Commercial Counsellor of Polish Embassy in Moscow, no 78.

¹² *Biuletyn Ekonomiczny*, no 78.

¹³ Technical Assistance for the Commonwealth of Independent States.

providing financial and technical support to CIS countries and its major beneficiary is Russia. The priorities of TACIS are now the following¹⁴: restructuring of state companies and development of private firms sector, creating an effective system of producing and processing food, development of infrastructure in power engineering, transport and telecommunications, safety of nuclear installations, reform of public administration, improvement in the functioning of welfare services and facilitating education. In 1991 – 1999 the EU allocated for the programme a total of 4220.9 million euro, from which Russia obtained 1301.5 million euro. TACIS programme has been prolonged for 2000-2006 and 3.1 billion euro has been granted for the purpose.

Apart from TACIS, in the EU – Russia relations some other programmes, directed at specific areas, are implemented, e.g. INOGATE – connected with obtaining and transporting oil and gas, BISTRO – supporting small projects in the sphere of finances, privatisation, small and middle enterprises and public administration, and ECHO – dealing with humanitarian aid.

Problem areas in mutual cooperation

Economic relations between the EU and Russia depend to a large extent on political relations. These relations limited the possibilities of implementing positive effects of the "Agreement on Partnership and Cooperation" in the first years after it had come into force. The situation in 1999 particularly influenced the economic cooperation. Different views on the war in Kosovo and the war in Chechnya caused worsening of political relations. As a result, the EU partly withheld its support from TACIS fund (90 million euro), as well as earlier granted credits from the European Bank for Reconstruction and Development (30 million euro).¹⁵ In recent years, political relations have improved, especially after 11 November 2001, when Russia declared its support for the antiterrorist coalition. Consequently, sanctions have been lifted and cooperation has become more dynamic.

As the Russian side emphasises, protection proceedings instituted for products exported to the EU market are an important problem or even an example of discrimination. According to estimates of the Russian side, losses of Russian exporters caused by protection and discrimination barriers and antidumping limitations amount to 3.5 billion USD.¹⁶ Such proceedings are treated by Russia as discrimination in trade. The EU starts a significant part of the proceedings (about 1/5). That is why the Russian side wanted the EU to recognise Russia as a market economy country. Obtaining this status limits the possibilities of star-

¹⁴ Dziewulski, R., *Stosunki...*, p. 72.

¹⁵ *Biuletyn Ekonomiczny*, no 69.

¹⁶ *Biuletyn...*, no 78

ting protection proceedings and provides better conditions for trade. On Russia – the EU summit in May 2002 President of the European Commission Romano Prodi informed about granting Russia a status of a rightful market economy state. A month later similar declaration was issued by the U.S. Achieving this status also supports Russia's efforts to become a member of the World Trade Organization. Russia applied for membership already within GATT in 1993 and renewed its application to WTO in 1995. The procedure of accepting new members includes negotiations between a candidate country and WTO members within the so-called Working Group. Results of negotiations with the EU are particularly important for Russia, because of its share in trade turnover. The Russian side is very active in this field, attempting to reach an agreement as quickly as possible. The year 2003 is considered the optimal date, because negotiations within the so-called Millennium Round of WTO are still in progress. Without membership, Russia will not have any influence on the process of negotiations. In negotiations between the EU and Russia much progress has been made in recent years, but the EU side still has some reservations concerning the openness of the Russian market of financial and telecommunications services, limitations of foreign capital share in companies, and a level of subsidising agriculture.

Membership in WTO is significant for Russia also because the EU enlargement and admitting new members from the Middle and Eastern Europe. As a member of WTO, Russia will be able to demand compensation to make up for a worsened situation in trade with the states of the Middle and Eastern Europe. Officially, Russia does not object to enlargement, but wants her interests to be taken into consideration during the process. It was indicated that the enlargement would induce worse conditions for Russian exporters on markets of the new member states, because of higher technical and quality standards. According to Russians, creation effects and trade shifts will take place, which will additionally lower Russian exports. Moreover, as Russia claims, new member states will use the EU system of general preferences towards developing countries, which will also negatively influence Russian exports. The Russian side also expresses doubts concerning visas and the status of Kaliningrad Oblast. In documents presented in 1999 and 2000 Russia proposed that these matters should be discussed in separate negotiations. It was even suggested that Russia will object to admitting into the "Agreement on Partnership and Cooperation" these new members of the EU which will not adhere to generally adopted principles. The EU did not enter into negotiations, considering the already existing structures a suitable forum for discussion. Carrying out a threat that the candidate countries will not be admitted into the Agreement is hardly possible, due to the influence on relations with the whole EU. What is more, the EU questions Russian estimates of losses incurred by Russia after the enlargement. According to these calculations, they will amount to about 2.5 billion USD in trade with

Poland, 1.2 billion USD with Hungary and 0.9 billion USD with Czech Republic.¹⁷ The European Commission underlines the following arguments:

1. Adopting by the candidate countries the customs tariff of the EU and using them also towards Russia will give rise to lowering of tariff rates as compared with the present level of national rates;
2. The candidate countries will abolish national quotas in imports from Russia;
3. In spite of strong economic bonds between countries of the Middle and Eastern Europe and the EU and free trade conditions, Russian exports to these states has been growing in recent years at the rate similar to general dynamics of the Russian exports. It proves that possible creation effects and trade shifts will be weak after the enlargement and will not exert significant impact on Russia's conditions of exports";
4. The Commission reminded that according to the "Agreement on Partnership and Cooperation and the agreement within WTO negotiations, Russia is obliged to achieve the EU and international standards.

To sum up the state of present bilateral relations, their significant development in recent years should be emphasised. A few conclusions characteristic to the cooperation can be drawn:

1. Russia aims at developing relations with the EU but perceives its own role more globally and tries to create strong links also with the U.S. and the South – Eastern Asia (Japan, China, Asian Tigers);
2. In the sphere of politics, Russia asserts its rights in the area of influences of CIS countries;
3. The EU is interested in intensifying relations, since this may provide opportunities for expansion and development. This policy is also supported by good outcomes of the Russian economy in recent years;
4. There appears a question at times whether Russia may become a member of the EU, but this issue should be considered only hypothetically. At the moment there are neither real economic prerequisites on both sides, nor political will;
5. As far as economic links are concerned, they will be developing, because this is profitable for both the EU and Russia. Closer relations will be the effect of the enlargement process, because the process will increase the share of the EU in Russian exports up to the level of 50%;
6. It seems that a real perspective in mutual relations is aiming at creating a free trade area, especially in the sphere of industrial goods. Such a possibility can be found in the "Agreement on Partnership and Cooperation";

Russia's membership in WTO should be treated as a necessary condition for further development of economic relations.

¹⁷ Dziejewski, p. 78.

Streszczenie

OPIS RELACJI POMIĘDZY ROSJĄ I UNIĄ EUROPEJSKĄ

Podstawowym dokumentem regulującym stosunki pomiędzy Rosją a Unią Europejską jest „Układ o Partnerstwie i Współpracy pomiędzy Wspólnotami Europejskimi oraz ich państwami członkowskimi oraz Federacją Rosyjską” podpisany 24 czerwca 1994 roku. Umowa ta pozwoliła na stworzenie podstaw formalnych i instytucjonalnych współpracy. Jednocześnie następował rozwój powiązań w sferze realnej.

Podsumowując obecny stan stosunków dwustronnych, należy podkreślić ich znaczny rozwój w ostatnich latach. Można też sformułować kilka wniosków charakteryzujących współpracę:

1. Rosja dąży do rozwoju stosunków z UE, ale widzi swoją rolę bardziej globalnie, dążąc do tworzenia silnych powiązań także z USA i Azją Południowo-Wschodnią (Japonia, Chiny, Tygrysy Azjatyckie);
2. W sferze politycznej Rosja uznaje wyłącność w sferze wpływów krajów WNP;
3. Unia jest zainteresowana intensyfikacją stosunków, gdyż dawać to jej może możliwość ekspansji i rozwoju.
4. Pojawiające się niekiedy pytanie o możliwość członkostwa Rosji w Unii Europejskiej należy rozpatrywać czysto hipotetycznie. Na dzień dzisiejszy nie ma po temu ani realnych przesłanek gospodarczych po obu stronach, ani takiej woli politycznej;
5. Postępować natomiast będzie rozwój powiązań gospodarczych, bo leży to w interesie UE i Rosji. Wzrost powiązań wynikać będzie z procesu poszerzenia UE, gdyż spowoduje to wzrost udziału UE w rosyjskim eksporcie do ok. 50%;
6. Wydaje się, że realną perspektywą we wzajemnych stosunkach jest dążenie do budowy strefy wolnego handlu, szczególnie w zakresie artykułów przemysłowych. Możliwość taka zapisana jest w Układzie o Partnerstwie i Współpracy.
7. Za warunek dalszego rozwoju powiązań gospodarczych uznać należy uzyskanie przez Rosję członkostwa w WTO.

TRADE LINKAGES BETWEEN NORTHERN POLAND AND THE BALTIC RIM COUNTRIES¹

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1. Introduction

Both volume and structure of exports and imports are characterised by a very strong regional differentiation inside Poland. The share in the international commodity exchange is also one of the few quantifiable yardsticks indicating the geographical directions of linkages between a given region of the country and the individual foreign countries. That is why the foreign trade turnover, when analysed at the regional level – or even at the local one – may constitute the study instrument allowing for the determination of the current economic basis for the contacts within the Baltic Rim. The subject of the present paper is constituted by the analysis of the trade flows between the regions of northern Poland at the level of provinces (*voivodships*), or even counties (*poviats*), and the Baltic Rim countries. The purpose of the study reported was to verify the proposition that northern Poland is in the economic sense a part of Baltic Europe. The consecutive parts of the report present the geographical distribution of foreign trade within the territory of Poland, globally and with the individual countries of the Baltic Sea region of Europe. A separate analysis was carried out of the foreign trade structure for three voivodships of northern Poland: Western Pomeranian, Pomeranian, and Warmian-Masurian.

The analysis of commodity turnover at the province and county level is made possible by the data from the Information Centre of Foreign Trade in Warsaw, aggregated for the classification into the countries of origin (imports) and destination (exports), expressed in US dollars. They originate from the SAD (Single Administrative Document) forms, filled out at the state border and collected by the customs officers. The analysis of exports on the basis of the SAD

¹ This paper was presented also on the 7-th Nordic-Baltic Conference in Regional Science, Ystad, Sweden, 02-05.10.2002

forms signifies the aggregation according to the locations of the exporters and importers, and not the producers and consumers. Therefore, the results obtained do not constitute the image of the spatial distribution of production for export, nor of the locations of consumption of the imported goods. They are, on the other hand, a reflection of the distribution of the businesses conducting commodity exchange with abroad. This, however, is the asset of the analysis carried out. The authentic economic links are namely established primarily by the exporters and importers. It is them, and not the producers, that are vested with the key task of the market economy, the one of finding the sales markets, promotion, and finally profitable sale abroad.

2. Regional differentiation of Polish commodity exchange with abroad

As mentioned already, Poland is characterised by a very uneven internal distribution of foreign trade (see table 1). The unevenness is visible already at the level of provinces (two out of 16 units, namely the Masovian and Silesian provinces, account for 35.4% of exports and as much as 52.2% of imports), but takes a truly full dimension when analysed at the county level. The commodity exchange with abroad, and first of all the exports, is concentrated in the broadly understood western half of the country, where practically all counties participate in it. At the same time, in eastern Poland, foreign trade is conducted almost exclusively in the largest centres. The main areas of concentration of exports on the scale of the entire country are:

- the agglomeration of Warsaw (more than 11% of exports – the seat of numerous trade companies, domination in the exports of almost all industrial branches, and in the agricultural exports),
- the Upper Silesian Industrial Region (along with the Bielsko-Biała region; export of coal, of the products of metallurgic industry, and of passenger cars – the plants belonging to Fiat and General Motors corporations),
- the Lubin Copper Basin (export of copper),
- the agglomeration of Poznań (similarly as in the case of Warsaw – the seat of numerous trade companies, and, besides, export of the electric machinery industry),
- the remaining large urban-industrial agglomerations, including, first of all, those of Gdańsk, Wrocław, Szczecin, Łódź, and Cracow,
- some of the smaller centres, in which modern industrial plants are located (most often with a share of foreign capital), such as, for instance, Olsztyn (Michelin), Kwidzyn (American Paper Corp.), Piła (Philips), Gorzów Wielkopolski (Volkswagen).

Table 1. Foreign trade in the year 2000 by voivodship. Basic indicators

Voivodships	Export				Import				Balance USD Mio.
	USD Mio.	as the % of Polish export	per 1 inhabitant in USD	as the % of GDP	USD Mio.	as the % of Polish import	per 1 inhabitant in USD	as the % of GDP	
Dolnośląskie	3 386,0	10,7	1139	27,7	3 179,6	6,5	1070	26,0	206,4
Kujawsko-pomorskie	1 409,1	4,5	671	18,9	1 456,2	3,0	694	19,5	-47,1
Lubelskie	762,3	2,4	342	12,2	546,7	1,1	245	8,7	215,6
Lubuskie	1 092,1	3,5	1066	29,3	861,6	1,8	841	23,1	230,5
Lodz	1 289,6	4,1	488	13,3	2 087,7	4,3	790	21,5	-798,1
Małopolskie	1 503,0	4,8	465	13,0	2 403,9	4,9	743	20,8	-900,9
Masovian	5 713,2	18,1	1126	18,8	20 732,2	42,4	4087	68,4	-15 019,0
Opole	554,0	1,8	511	15,2	655,3	1,3	604	17,9	-101,3
Podkarpackie	1 262,0	4,0	593	20,2	832,6	1,7	391	13,3	429,4
Podlaskie	413,2	1,3	338	11,6	408,8	0,8	335	11,5	4,4
Pomeranian	2 673,3	8,5	1216	30,1	3 140,1	6,4	1428	35,3	-466,8
Silesian	5 474,5	17,3	1129	25,4	4 808,7	9,8	992	22,3	665,7
Świętokrzyskie	315,4	1,0	238	7,6	442,0	0,9	334	10,7	-126,5
Warmian-Masurian	860,3	2,7	586	18,9	593,5	1,2	404	13,0	266,8
Wielkopolskie	3 353,5	10,6	998	23,7	4 800,0	9,8	1428	33,9	-1 446,5
Western Pomeranian	1 497,5	4,7	864	21,5	1 539,5	3,1	888	22,1	-42,0
<i>unknown</i>	28,4	0,1	XXX	XXX	413,0	0,8	XXX	XXX	-384,6
POLAND	31 587,3	100,0	817	20,4	48 901,4	100,0	1265	31,5	-17 314,1

Source: own elaboration based on Foreign Trade Information Centre materials.

Spatial concentration is even more pronounced in the case of imports. The position of Warsaw (as the seat of the importing firms) is here absolutely dominating (30.5% of the entire value of imports). The role of the remaining urban agglomerations (especially of Poznań and Gdańsk) is also higher than for the exports. On the other hand, the significance of the Upper Silesian Industrial region is relatively lower. The direct import of foreign commodities to the local centres is marginal in almost entire country (except for the regions of Greater Poland and Lower Silesia). Giant import centres are constituted by towns, in which large oil refineries are located – Płock and Gdańsk. The previously mentioned centres of modern industry, where export-oriented production is usually accompanied by intensive import of components, and sometimes also machines for modernisation of production, also come to the forefront.

Some regions of the country feature a belt-like setting of counties with a more pronounced significance in the international commodity exchange, usually associated with the elements of transport infrastructure. The belts of this kind took shape, for instance, along the lines: Berlin-Wrocław-Cracow-border

with Ukraine, Warsaw-Lublin-border with Ukraine, as well as along the coast between Szczecin and Gdańsk. The beginnings of a belt-like concentration of trade can also be observed along the route of Via Baltica from Warsaw towards the Lithuanian border.

Now, if we consider the value of Polish exports and imports per capita, the regional inequalities turn out even bigger. Thus, for exports, in the setting of provinces, the highest level of the indicator is observed for the Pomeranian province (1216 USD per capita). The values exceeding 1000 USD are also observed elsewhere in western Poland and in the Masovian province (where, though, almost entire export originates formally from Warsaw and its surroundings). In the provinces of the eastern borderland the value of exports per capita falls below 500 USD; in northern Poland the highest values are observed in the large towns, and also in these counties, in which modern industrial plants are located. (like Kwidzyn or Police). The value of exports per capita is, on the other hand, quite low in almost entire Warmian-Masurian province (except for the towns of Olsztyn and Elbląg), and in the western part of the coastal belt. A similar spatial setting is observed for the ratio of the value of exports to the GDP: outside of the Masovian province (68%) it attains the highest values in the Pomeranian voivodship (35%), while in the Warmian-Masurian, located between the two, it falls down to the mere 13%.

Trade with the countries of the European Union dominates on the prevailing part of the area of Poland (Grabowiecki J., 2001). There are, however, again, important regional differences in the share of exports to the Union in the total export value (Komornicki T., 2000). In terms of the former setting of 49 provinces, valid between 1976 and 1998, the strongest links with the Union were noted in the Gorzów province, neighbouring upon Germany, where in 1997 the countries of the Union accounted for 92.6% of exports, while the weakest links were observed in the Przemyśl voivodship, located at the border with Ukraine – only 18.3%. The spatial image is in case of this indicator very clear. The significance of the Union in the exports gradually decreases as one moves towards the East (dropping to below 50% to the East of Vistula and below 25% at the eastern borderland), making room for the larger share of exports to the countries of the former USSR. The spatial differentiation of the shares of the European Union in the value of imported goods is much smaller. These shares are namely usually high also in eastern Poland (thus, for instance, in the former Łomża voivodship this share was at 88.9%), except for the counties directly adjacent to the eastern border. It can therefore be concluded that the tradesmen from the Union penetrated practically to every region of Poland, turning it into the sales market for products offered by them. At the same time the producers and exporters from eastern Poland have not managed over the 1990s to find a place on the western European market. The countries of the former USSR remained their partners to a much higher degree.

3. Commodity exchange with the Baltic Rim countries – the regional distribution

3.1. Commodity exchange with Germany

Germany is the largest Polish trade partner. This situation is not (or is only to a very limited extent) the result of economic collaboration within the Baltic region. The trade with Germany dominates in almost all branches and on almost whole territory of Poland. A detailed analysis of structure of the Polish-German trade would therefore exceed the frames of the present report. That is why we present below only a couple of basic facts associated with the structure and spatial distribution of the bilateral trade turnover.

Germany, in opposition to almost all the remaining countries of the European Union, has only slightly positive balance of trade with Poland (see table 2). Moreover, in the years 1996-2000 the dynamics of exports to Germany was somewhat higher than of imports from this country. The list of goods exported to Germany is headed by furniture (1.1 billion USD in 2000), followed by garments (927 million USD), internal combustion engines (728 million USD), passenger cars, simple wood products (“Euro-pallets”), nets, metal structures, and only then, at lower positions, raw materials, such as copper (188 million USD) and coal (186 million USD). The selection of goods imported from Germany is dominated by industrial machinery, plastics, passenger cars (541 million USD), trucks, and car parts (including engines), and further on, in particular, medicines, paints, oil products, and feed stuffs for animals.

The spatial distribution of the trade with Germany appears to be a derivative of the economic factor (location of modern industry) and the historical factor (higher intensity on the areas having belonged in the past to Germany). An especially intensive trade is taking place in the south-western Poland, in the region of Poznań, and within the coastal belt. The position of Warsaw is relatively weaker (the capital features the most differentiated geographical structure of the trade partners). We can in a way nominally designate three belts of intensive economic contacts with Germany:

- from Berlin and Dresden through Upper Silesia up to the south-eastern Poland,
- from Berlin through Poznań towards Bydgoszcz and Olsztyn,
- from Berlin through Szczecin to Gdańsk.

The least intensive trade links with Germany are observed in the north-eastern Poland.

Table 2 . Trade between Poland and Baltic Rim countries

Countries	Import			Export			Balance	
	1996	2000	1996=100	1996	2000	1996=100	1996	2000
	USD Mio.	USD Mio.		USD Mio.	USD Mio.		USD Mio	USD Mio
Denmark	811,8	784,3	97	743,9	857,2	115	-67,9	72,9
Estonia	22,3	34,9	157	57,3	90,0	157	35,0	55,1
Finland	610,8	888,9	146	315,4	230,8	73	-295,4	-658,1
Lithuania	109,7	278,0	253	230,3	561,2	244	120,6	283,2
Latvia	16,7	32,8	196	80,7	206,9	256	64,0	174,1
Germany	9166,3	11701,1	128	8417,0	11043,0	131	-749,3	-658,1
Norway	373,9	404,8	108	298,6	332,9	111	-75,3	-71,9
Russia	2525,9	4619,4	183	1653,8	862,1	52	-872,1	-3757,3
Sweden	996,9	1406,1	141	582,6	861,2	148	-414,3	-544,9

Source: Statistical yearbooks of foreign trade 1997, 2000. GUS, Warszawa

3.2. Trade exchange with Russia

Russia is the largest economic partner of Poland in the East. In view of the domination of the energy carriers (close to 90% of imports is constituted by oil – 3.2 billion USD, and natural gas – 0.6 billion USD) the trade balance with Russia is very much negative. In 2000 Poland exported to Russia the goods of total value of only 862 million USD, while imports totalled 4.6 billion USD (see table 2). Yet in 1996 Polish exports to Russia largely compensated for the import of raw materials. After the crisis of 1998 exports broke down (in 2000 exports amounted to only 52% of the value from 1996), while the volume of imports of fuels increased, as did their prices. Current exports are mainly composed of food products (including meat – 73 million USD, and coffee), chemical products (medicines – 41 million USD, beauty products – 35 million USD; in both these cases Russia is the largest purchaser; synthetic rubber), paper and paper products (altogether more than 70 million USD), live animals, glass, and furniture. The trade turnover with Russia is dominated on the scale of the country by three centres: Warsaw, Gdańsk, and Płock. In the latter two virtually entire trade is constituted by the import of Russian oil, in Warsaw it is the centrally recorded import of natural gas. In contrast, though, to the two other towns, where oil refineries are located, Warsaw constitutes also a centre of export to the Russian market. Important centres of export to Russia are also constituted by some of counties close to Warsaw (locations of the plants of the international corporations, such as Nowy Dwór Mazowiecki, Piaseczno, or Pruszków). If we neglect the previously mentioned “raw material” centres of concentration, trade with Russia would turn out relatively equilibrated and spatially dispersed across the entire country. On the area of interest for us here, that is –

of the broadly understood northern Poland – the counties featuring relatively high trade turnover with Russia are concentrated in the western part of the Warmian-Masurian province (Elbląg, Olsztyn, Kwidzyn, counties of Ostróda and Bartoszyce – the vicinity of the Kaliningrad district) and in the eastern part of the Pomeranian voivodship (first of all in Gdańsk and Gdynia). Export dominates over this entire area (except for the oil importing Gdańsk). An opposite situation (i.e. domination of imports) is observed, on the other hand, in Szczecin and Koszalin.

3.3. Trade exchange with the Baltic states

Lithuania is one of those truly few countries, with which Poland has a decidedly positive trade balance. Thus, in 2000, the value of commodities imported from Lithuania amounted to 278 million USD, while export totalled 562 million USD. The trade flows in both directions increased in the second half of the 1990s two and half times (see table 2). Polish exports to Lithuania include primarily machines and equipment (heating appliances, electric home appliances), steel products, products of the textile industry, as well as paper and paper products (altogether roughly 60 million USD), furniture, raw wood, chipboards, cleaning products (48 million USD – the largest purchaser), beauty products (31 million USD), medicines (12.4 million USD – the second largest purchaser), as well as food products (in particular: coffee). Imports from Lithuania are dominated by the textile materials and products, oil and oil products (83 million USD) as well as mineral fertilisers.

The Polish-Lithuanian trade exchange concentrates within Poland in the large urban-industrial centres (Warsaw, Wrocław, Cracow, Toruń, Poznań, Płock), in the region of Greater Poland – in Cuiavia, and in Podlasie province. In the latter province the largest trade centres are Białystok (with a clear domination of exports) and Suwałki (where import dominates). Concentration of economic contacts with Lithuania can be observed within the belt stretching between the Polish-Lithuanian border and Warsaw (the Via Baltica transport corridor, including, in particular, the county of Grajewo), and further on towards Germany.

In spite of the constant growth during the 1990s, the total value of the Polish-Latvian trade exchange is relatively low. Poland exports to Latvia goods of total value of 206.9 million USD (as of 2000: first of all food products, including chocolate, and products of chemical industry, including beauty and cleaning products), while importing for only 32.8 million USD (first of all metals, wood, and products of stone). The main centres of trade with Latvia are Warsaw, Lodz, and Białystok; a definite role is also played by the towns of Upper Silesia, Wrocław, Poznań, as well as the urban centres of northern Poland – Olsztyn, Gdańsk and Szczecin. Within the area of interest for us the

counties of the Pomeranian province are more involved in this trade than those of the Western Pomeranian and Warmian-Masurian provinces. One can also speak of a certain concentration of bilateral trade along the axis of Via Baltica. This concentration is however, much less pronounced than in the case of Lithuania.

The place of Estonia in Polish foreign trade is even more marginal than that of Latvia (in 2000: export of 90 million USD, including food products, chemicals; import of 34.9 million USD, mainly wood and wood products). Simultaneously, there is a very strong concentration of trade turnover, in case of export – in Warsaw, Częstochowa, Białystok and Elbląg, while in case of import – in Gdynia, Szczecin and Elbląg. Contrary to the trade with Latvia we can speak of the higher than average share of Estonia in the trade exchange of the northern provinces (especially so for the very coastal belt).

3.4. Trade exchange with the Nordic countries

Sweden belongs to the most important trade partners of Poland. Total turnover of bilateral trade exceeds 2.2 billion USD. Among all the Nordic countries the trade exchange with Sweden featured decidedly the highest dynamics during the second half of the 1990s (increase by approximately 50% in both directions, see table 2). The trade balance, though, is clearly negative. The branch structure of this trade is disadvantageous for Poland, as well. Thus, exports to Sweden include, first of all, furniture (95 million USD), copper (65 million USD), electric appliances (47 million USD), metal products, coal (23 million USD), and, besides, processed fruits, worked wood, TV sets (20 million USD). Simultaneously, imports are dominated by car parts (423 million USD), telecommunication equipment (126 million USD), oil products (74 million USD), combustion engines (46 million USD), pharmaceuticals (38 million USD), and passenger cars (18 million USD). Despite the potential possibilities, Sweden is currently not a significant provider of iron ores to Poland. Trade with Sweden concentrates in a distinct manner in some regions of the country. Side by side with Warsaw and its vicinity, most important is the entire coastal belt from Szczecin to Elbląg. The main centres of export to Sweden on this area are Gdańsk, Police and Kwidzyn, while in import the primary role is played by Słupsk, Szczecin and Gdynia, the position of the smaller centres being marginal. In other regions of the country trade with Sweden is concentrated in the largest agglomerations (Poznań, Wrocław, Łódź, Cracow, Upper Silesia), and also in the Lubin Copper Basin (exclusively export). Virtually all the north-eastern Poland does not participate in this trade.

Denmark is among the most important Polish trade partners, as well. This bilateral trade is equilibrated, but the dynamics of mutual flows has recently not been too high. The goods exported to Denmark include, in particular, garments

(168 million USD), coal (58 million USD, the fourth largest purchaser), oil products (78 million USD – the largest purchaser), furniture (51 million USD), fruit products, animal feed stuffs, and wood. Poland imports from Denmark pharmaceuticals (66 million USD), cotton and chemical fibre tissues, as well as machines and equipment. The most important centres of exchange with Denmark are Warsaw, Upper Silesia, Szczecin, Gdańsk, Poznań and Piła. In the belt setting the areas of relatively higher bilateral economic contacts are observed along the direction from Szczecin through Poznań towards Warsaw, and along the seacoast from Szczecin through Gdańsk towards Olsztyn (this belt including, characteristically for this trade direction, also the smaller centres).

Trade with Norway has somewhat smaller economic significance for Poland. Yet, this country is the largest external provider of fish on the Polish market (115 million USD). Besides, in particular, relatively small quantities of oil (24 million USD), and of propane-butane are imported from Norway. Poland exports to Norway include ships (135 million USD) and coal. Trade with Norway is concentrated in the coastal agglomerations (Gdańsk-Gdynia, Szczecin-Police), as well as in Warsaw and in Katowice (export of coal).

The value of imports from Finland is close to four times higher than the value of corresponding exports. The main Polish export items remain, namely, coal (67 million USD, the second largest purchaser after Germany) and the products of metallurgy, while Norway supplies Poland mainly with telecommunication equipment (altogether 184 million USD – the third largest supplier, cell phones in particular) and electronic devices, as well as ships (125 million USD). In the second half of the 1990s Polish export to Finland perceptibly decreased, while import has been constantly on the increase. In geographical terms import is dominated by Warsaw (phones) and Szczecin (ships), while export – by Katowice (coal). The role of the remaining centres (including large agglomerations) is limited. Side by side with Szczecin, the centres participating in this trade within northern Poland are, in particular, Gdańsk, Gdynia, Elbląg and Kwidzyn.

4. Foreign trade of the northern provinces

4.1. The Western Pomeranian voivodship

The intensity of exports (both in terms of per capita value and in relation to the GDP) remains in the Western Pomeranian province at the level close to the national average. On the other hand, the value of imports per capita is among the highest in the country. The balance of trade of the province is only slightly negative (see table 1).

The main trade partner of the Western Pomeranian province is the neighbouring Germany. Trade with Germany accounts for 37% of exports and 27%

of imports of the province, both these shares only marginally exceeding the respective national averages. On the other hand, the shares of trade with the Scandinavian countries are decidedly above the average, first of all with Denmark and Sweden, and with respect to imports – also with Finland and Norway (see table 3). Among the countries of the Baltic Rim the role of Russia is decidedly lower, while the trade with Lithuania, Latvia and Estonia is of marginal significance. The primary centre of trade is constituted by Szczecin, significant roles being also played by Koszalin and Police (the seat of the large chemical plants) and Szczecinek (production and export of chipboards). In the majority of local centres the dominating economic partner is Germany, while in several cases the second one as to significance is Denmark. Only Szczecin and Police have a more diversified geographical structure of trade.

Table 3. Foreign trade with Baltic Rim countries by voivodships of North Poland

Voivodships (North Poland)	Export									
	Total in USD	of which to the countries (in %):								
		Denmark	Estonia	Finland	Lithuania	Latvia	Germany	Norway	Russia	Sweden
Pomeranian	2 673 286 529	4,4	0,2	0,4	0,9	0,3	30,8	7,3	2,6	5,1
Warmian-Masurian	860 269 718	4,3	1,0	1,3	1,2	0,7	36,8	1,2	6,4	2,8
Western Pomeranian	1 497 482 619	5,7	0,1	0,6	0,9	0,3	37,0	2,0	1,0	7,9
POLAND	31 587 316 133	2,7	0,3	0,7	1,8	0,7	35,0	1,1	2,7	2,7
Voivodships (North Poland)	Import									
	Total in USD	of which from the countries (in %):								
		Denmark	Estonia	Finland	Lithuania	Latvia	Germany	Norway	Russia	Sweden
Pomeranian	3 140 120 256	2,5	0,1	2,6	0,5	0,1	15,0	3,0	25,5	7,4
Warmian-Masurian	593 474 063	4,3	0,8	2,0	1,3	0,3	26,8	0,2	3,3	4,6
Western Pomeranian	1 539 508 162	4,3	0,4	9,9	0,3	0,2	27,3	5,7	5,7	7,2
POLAND	48 901 384 713	1,6	0,1	1,8	0,6	0,1	23,9	0,8	9,4	2,9

Source: own elaboration based on Foreign Trade Information Centre materials

4.2. Pomeranian voivodship

The Pomeranian province belongs to the regions of the country with the highest levels of both exports and imports, in per capita and GDP share terms, mainly owing to the activity of the Gdańsk agglomeration. The balance of trade is decidedly negative (close to -500 million USD), primarily due to the massive import of the Russian oil to the Gdańsk refinery. For the same reason the share of Germany in imports is among the lowest in Poland (only 15%; see table 3). In case of exports, though, the share of Germany is close to the average one. In this province, as well, the trade with the Nordic countries plays an important role, first of all with Sweden (5.1% of the export value and 7.4% of import) and with Norway (in export – sale of ships), and to a somewhat smaller degree with Denmark and Finland. The trade with Russia, except for the import of oil and export of paper, has a relatively small significance, despite the neighbourhood of the Kaliningrad district. Trade with the Baltic states does not play any bigger role, neither.

Inside the province the biggest role in foreign trade is played by four centres: Gdańsk, Gdynia, Kwidzyn (paper production), and Słupsk. Note, though, that both export and import is observed in all the counties of this province. In Gdynia, Słupsk and the majority of the local centres the primary destination of exports is Germany. In Gdańsk a bigger role is played by the Nordic countries, while in Kwidzyn – by yet other countries (a very differentiated structure of export destinations, including Russia and the Baltic states). With respect to imports the role of Germany is smaller, while that of the Nordic countries – decidedly bigger (especially in Słupsk – import of subassemblies to the Scania truck assembly plant).

4.3. Warmian-Masurian voivodship

The shares of the Warmian-Masurian voivodship in the totality of Polish foreign trade are very small, both in global numbers, and in per capita as well as GDP terms. At the same time, though, the province boasts a definitely positive trade balance (+267 million USD in 2000; see table 1). The decidedly most important trade partner is Germany (37% of exports). Among the partners of interest for us the shares of Russia and Denmark are higher than on the average in exports, while those of Denmark, Sweden, as well as Lithuania, Latvia and Estonia – in imports (see table 3). The majority of the trade turnover of the voivodship is concentrated in Olsztyn and Elbląg (in particular – the plant of the ABB corporation). In Olsztyn the dominating partner is Germany, while in Elbląg a significant role is also played by Russia, the Scandinavian countries, and some other countries. Exports to Russia originate, as well from the county

of Ostróda (meat products) and from the areas adjacent to the Kaliningrad district (Bartoszyce and Lidzbark counties).

5. Summary

The analysis presented indicates that the economic ties with the countries of the Baltic Rim are in northern Poland determined first of all by:

- distribution of the economic activity on the Polish side (including the distribution of the foreign investments in the 1990s, as well as the development dynamics of petty industries),
- infrastructural ties (e.g. Via Baltica, and also the functioning of the ferry connections),
- historical ties (the role of Germany, especially in the trade of the Western Pomeranian and Warmian-Masurian provinces).

The economic centres of northern Poland, having developed yet before the transformation period, founded their further development in the 1990s on, in particular, the trade exchange with the partners from the Baltic Sea region. At the same time, some centres having had a weaker initial position did not take advantage of the opportunity offered by the liberalisation of the economy (including foreign trade) and based their trade activity uniquely upon the interest from the side of the German partners (and have not looked for the new sales markets on the other side of the Baltic Sea). The higher than average development of both import and export took place in these towns, where larger foreign investments had been made.

Summing up, we should state that northern Poland belongs to the regions with relatively high significance in Polish foreign trade. When asked of the membership of this region in the “Baltic Europe” one can answer nowadays, although with a certain precaution, positively. Formation of the regional economic ties is demonstrated, in particular, through the following facts:

- higher than average increase of turnover between Poland and all the countries of the Baltic Rim (except for the exports to Russia and Finland) in the years 1996-2000;
- concentration of the trade exchange with Denmark and Sweden, and to a smaller degree also with Finland and Norway, in the coastal provinces;
- existence of the trans-Baltic trade ties in some of the middle-sized, and even local, centres (especially with Denmark);
- existence of the cross-border (also unofficial) exchange between the border areas of Poland and the Kaliningrad district of Russia.

Simultaneously, it should be noted that the ties referred to remain much weaker than the cross-border connections to the overland neighbours. Thus, in the western and eastern border counties the shares of, respectively, Germany or Ukraine, in trade flows are decidedly higher than the share of all the Scandinavian countries in the trade turnover of northern Poland. Besides, northern Poland is not, as of now, an area of increased concentration of the economic ties with Lithuania, Latvia, and Estonia.

Fig. 1. Export from Poland in the year 2000 (total and to Baltic Rim countries) by *poviats*

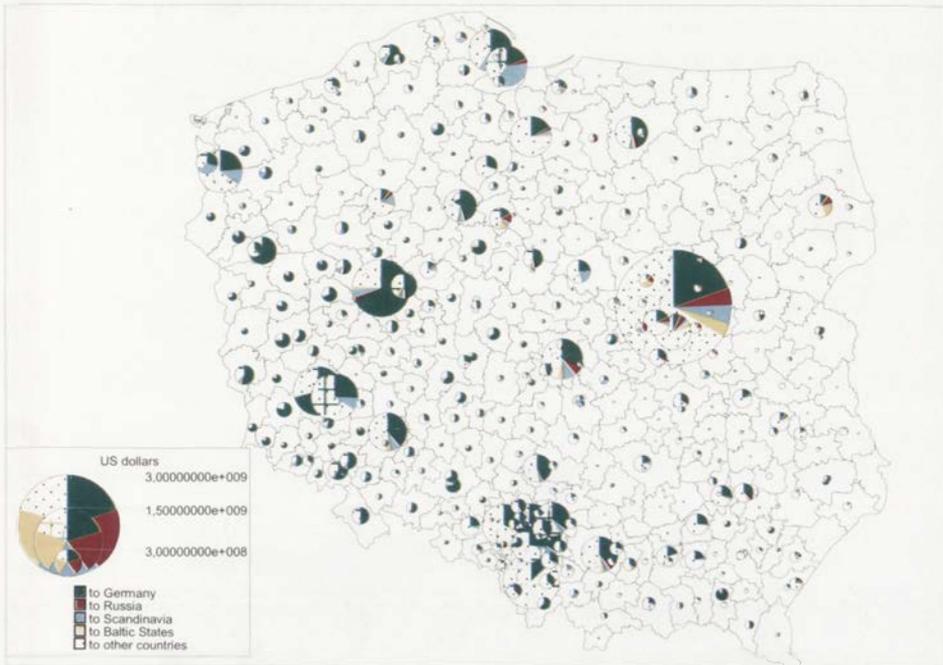


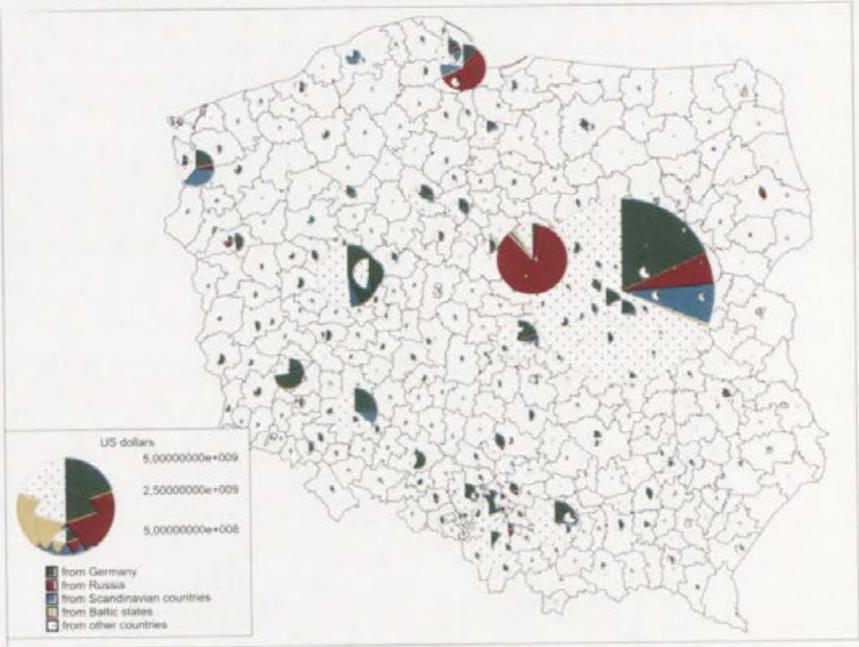
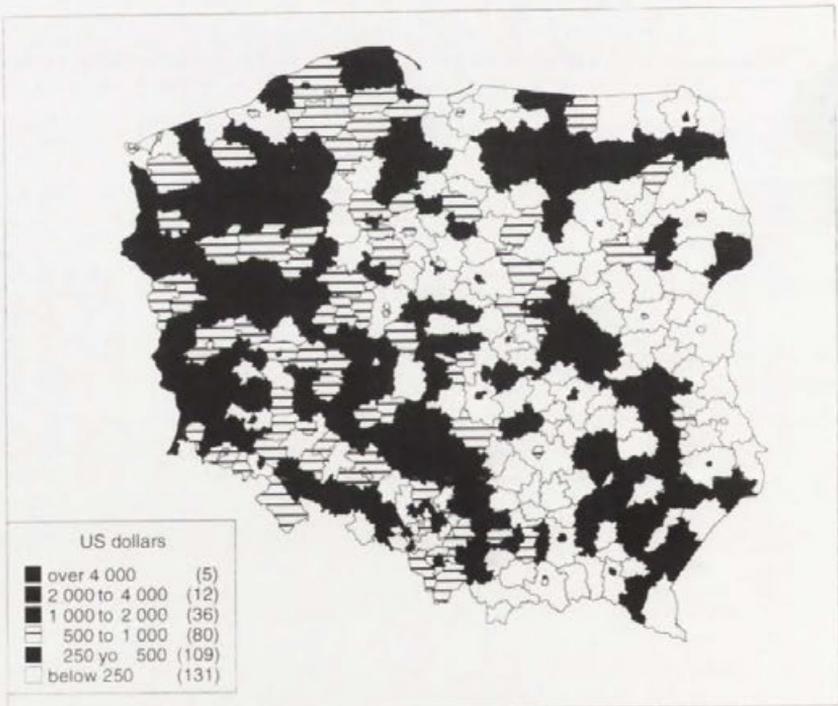
Fig. 2. Import to Poland in the year 2000 (total and from Baltic Rim countries) by *poviats*Fig. 3. Export per capita in the year 2000 by *poviats*

Fig. 4. Polish-German trade in the year 2000 by *poviats*

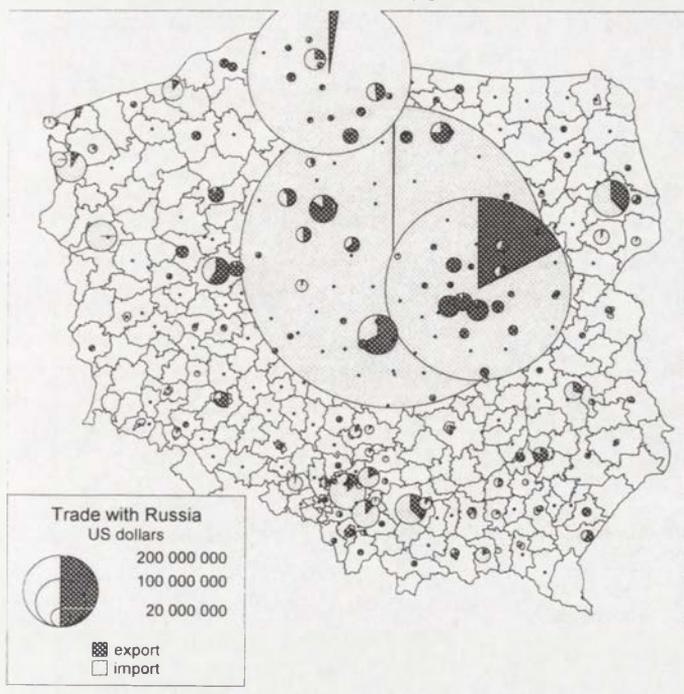


Fig. 5. Polish-Russian trade in the year 2000 by *poviats*

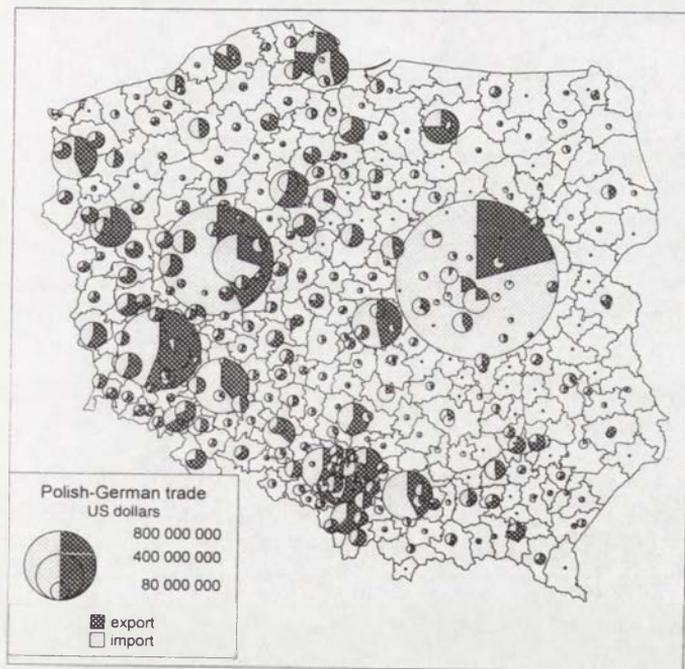


Fig. 6. Polish-Lithuanian trade in the year 2000 by *poviats*

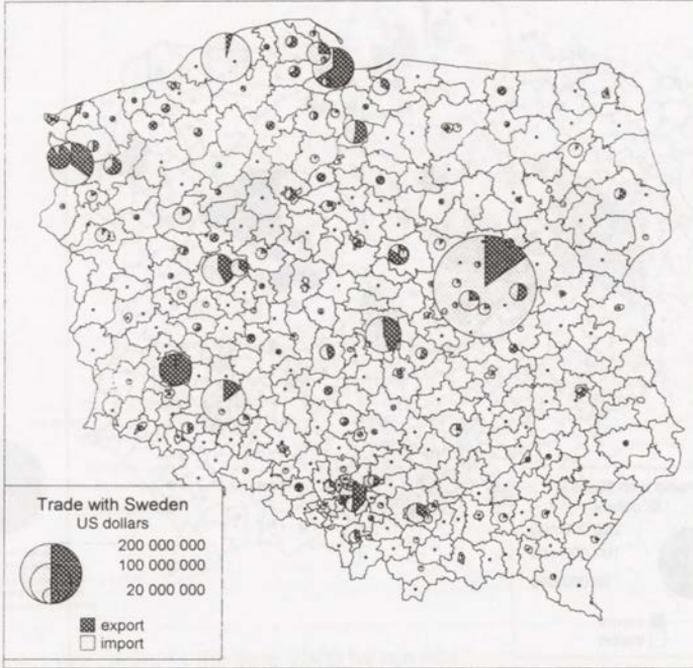


Fig. 7. Polish-Swedish trade in the year 2000 by *poviats*

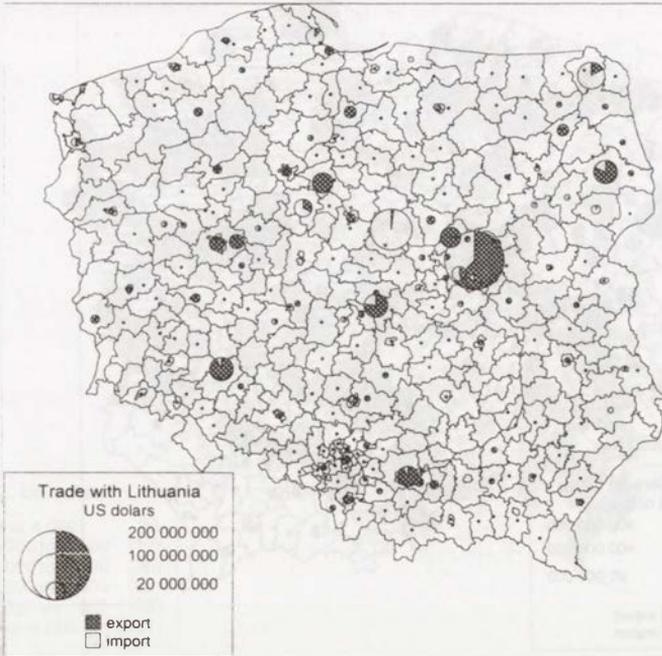


Fig. 8. Polish-Danish trade in the year 2000, by *poviats*

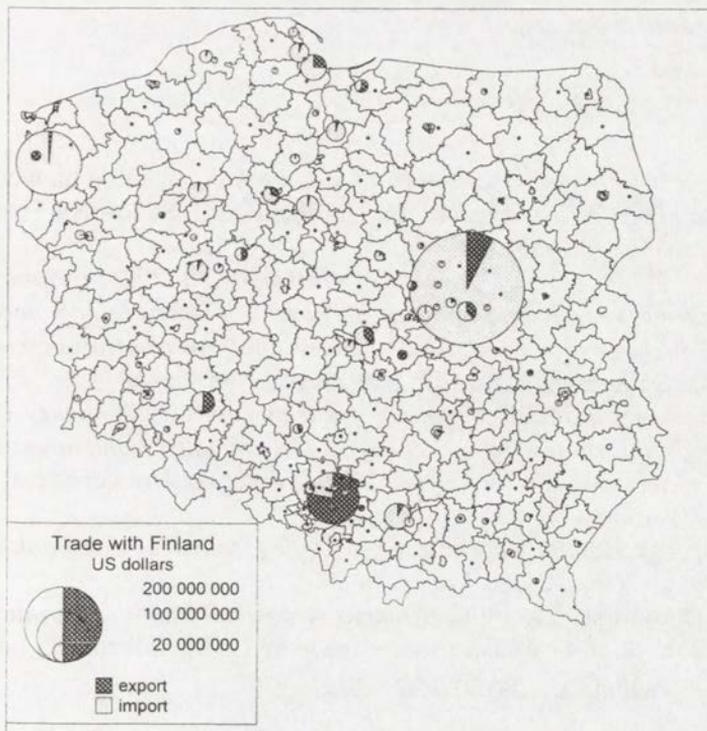
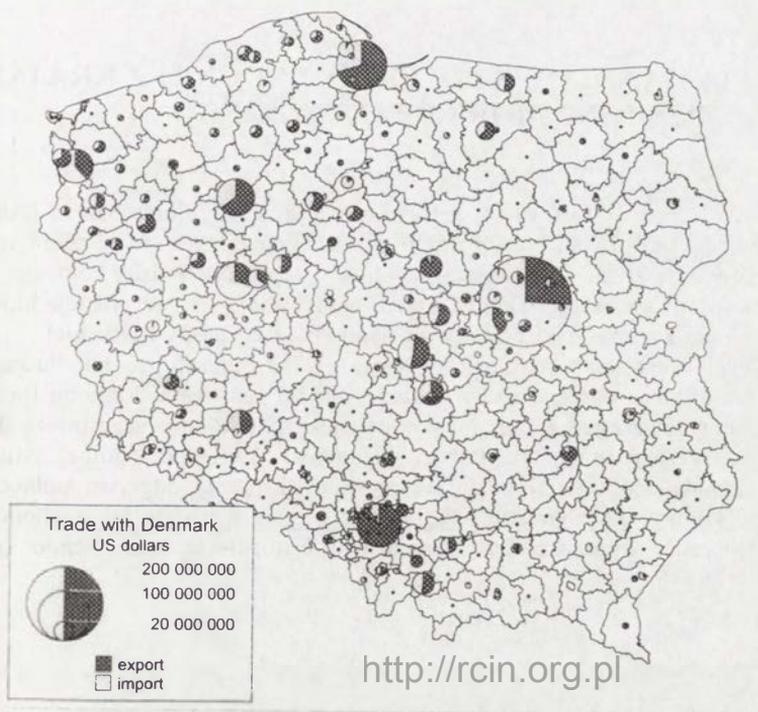


Fig. 9. Polish-Finish trade in the year 2000 by *poviats*



Sources (for all figures): own elaboration based on Informatic Centre of Foreign Trade, Warsaw

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Streszczenie

POWIĄZANIA HANDLOWE POLSKI PÓŁNOCNEJ Z KRAJAMI REGIONU MORZA BAŁTYCKIEGO

Powiązania handlowe zarówno w całej Europie, jak i w regionie Morza Bałtyckiego są najczęściej analizowane na poziomie poszczególnych państw. Przedmiotem artykułu jest natomiast zbadanie wymiany handlowej regionów Polski Północnej na poziomie województw, a nawet powiatów. Celem opracowania jest weryfikacja hipotezy, że Polska Północna w sensie gospodarczym stanowi część Europy Bałtyckiej.

W kolejnych częściach przedstawiony został rozkład geograficzny handlu zagranicznego na terenie Polski ogółem oraz z poszczególnymi państwami Regionu Bałtyckiego. W wymianie towarowej z zagranicą w największym stopniu uczestniczą duże aglomeracje oraz szeroko rozumiana Polska Zachodnia. Względem ogólnej sytuacji gospodarczej, zaskakująco wysoki udział w polskim eksporcie odgrywa północno-zachodnia część kraju. Rola wymiany handlowej z zagranicą maleje ku wschodowi. W tym samym kierunku zmniejsza się też udział Unii Europejskiej oraz Niemiec (naj-

więszy partner) w całości obrotów (z poziomu ponad 50% na pograniczu zachodnim do 16-20% w województwach wschodnich). Obroty z państwami skandynawskimi koncentrują się w Polsce Północnej oraz w rejonie Warszawy, Górnego Śląska i kilku innych dużych ośrodków miejskich.

Odrębnej analizie poddana została struktura handlu zagranicznego trzech województw Polski Północnej: zachodniopomorskiego, pomorskiego i warmińsko-mazurskiego. Stwierdzono, że w pierwszych dwóch ponadprzeciętną rolę odgrywa wymiana z Szwecją i Danią. O ile ogółem na Szwecję przypada 2,7%, a na Danię 2,6% polskiego eksportu, to w przypadku województwa pomorskiego analogiczne udziały wynoszą 5,1% i 4,4%, a w przypadku zachodniopomorskiego 7,9% i 5,7%. Jest charakterystyczne, że wymiana ze Szwecją (a także z Finlandią i Norwegią) pozostaje skoncentrowana w największych miastach regionu, a wymiana z Danią odznacza się znacznym rozproszeniem po całym obszarze Pomorza.

Analiza potwierdziła, że pomimo iż głównym partnerem handlowym Polski Północnej są Niemcy, to jednak duży udział krajów skandynawskich w obrotach tej części kraju, wskazuje na ukształtowanie się trwałych transbałtyckich więzi gospodarczych o charakterze regionalnym. Jednocześnie powiązania z Litwą, Łotwą i Estonią koncentrują się raczej w Polsce wschodniej i centralnej niż na wybrzeżu.

Ways to improve the quality of care for patients with chronic conditions... The American Medical Association has long been committed to the highest standards of medical care... This report outlines the key areas for improvement and provides a framework for action...

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THE POLITICAL PARTIES OF UKRAINE ON THE EVE AND AFTER PARLIAMENTARY ELECTIONS IN 1998 AND 2002: FOREIGN POLICY ORIENTATION ANALYSIS

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Lately the world has been changing very fast. Instead of two-poled Communist-Capitalist and NATO-Warsaw Europe the European Union (EU) and “Euro-Asian” space have emerged and between them Eastern Europe which dissolves in both directions in a very quick way. Among the main tendencies, which influence the European formation, primarily, we must determine European integration, one of the essential peculiarities of the modern stages of the continent dividing lines overcoming. [13, p. 23]. The first of such lines, which was marked by the borders of the former “socialist camp” states, virtually has stopped its existence. However, another one – the border of the former USSR – until this time is often perceived as an invincible barrier.

Expansion of the European Union to the East primarily is the political problem, concerning the stability and security of the entire European continent. The premises of the united geopolitical space formation are creating on the European domains not simply as geographic-territorial space not only as a geopolitical phenomenon, but at the same time as a powerful political and economical factor. Each country, which wants to be included into EU must prove its ability to protect democracy and legal state guarantee human rights etc. In this context of specific interest and topicality is the foreign policy of Ukraine in general, and in particular, strategy course on integration into European and Euro-Atlantic structures as the primary objective.

The policy in modern democratic states is the matter of the political parties, which can be defined as organized in a proper way part of the social community, class which is entitled to express and protect this community interests and also require their obedience and fulfillment. In many respects, the Ukrainian political parties currently remain weak and underdeveloped. That is the very case when we must not exaggerate their impact on foreign policy, nevertheless, the given influence should be taken into consideration regarding the fact that the

political parties start representing inner interests which Ukrainian state must be born in mind forming its foreign policy course.

The objective of this scientific investigation is the research and comparative analysis of the problem of the foreign policy orientations of the Ukrainian political parties on the eve and after parliamentary elections in 1998 and 2002.

Not once the suggested problem was highlighted in the foreign and native authors' works among which we can't but mention the research of V. Budkin [1], E. Wilson [3], B. Parakhonskyi [10] and B. Sokolovskyi [13] where the foreign policy orientations of the Ukrainian politicum are characterized as political fighting factor on the eve of the elections to the 3^d and 4th Verkhovna Rada of Ukraine. Moreover, we must not ignore the works of such prominent Ukrainian politologists as V. Khmelko [16], P. Rudyakov [11, 12], O. Derhachov [5, 6] and A. Kruhlov [9], who emphasize the political parties', social, economical and integration orientations of Ukraine during 1998-2002.

Ukrainian electoral map had appeared by the beginning of the official election campaign to Verkhovna Rada in 2002. In general, the electors' likings in different Ukrainian regions have been based on their former voting experience since 1991. Since the very time it was accustomed to refer to the Ukrainian dichotomy in the East-West line in the circles close to politics. Alongside if the West is given national, pro-European, religious characteristics, Ukrainian language usage and loyalty to the authorities then in the mass mentality the East is associated with the opposite – denationalization, pro-Russian orientation, use of Russian language, social values priorities to national cultural and religious and adamant oppression and indifference to authorities [2, p.19]. In the party-ideological context, the West is for Rukh and independence, and the East – for the communists and integration with Russia. Such a situation was at the beginning of the Independence and in the ordinary person's mentality and it is still preserved. However, virtually the situation with the Ukrainian political-regional landscape was more complicated and began changing just after the first elections. To great extent, these changes were displayed during the parliamentary and presidential campaigns of 1998 and 1999 years.

The analysis of the state and tendencies of the public opinion evolution on the eve and after the parliamentary elections in 1998 results in the conclusion that foreign policy problems played the secondary role in the electorate position determination comparing with the problems of the Ukrainian domestic socio-economical and political life. It has been explained by the fact that by the present time, no one party or political grouping had had either crucial or essential impact on the Ukrainian foreign policy course pursuing, which was completely defined by Kuchma administration (on the contrary of the former Kravchuk administration, where national-democratic forces considerably influenced its foreign policy strategy and tactics).

The specific feature of the above-mentioned parliamentary elections campaign was the creation of maximum simplified images of the foreign allies and enemies. The Organization of the Northern-Atlantic Treaty turned out on the edge of propaganda battles. The parties and the alignments expressed their attitude towards NATO and to some extent – towards the European Union, the USA, and the International Monetary Fund etc. Simultaneously Russia played the role of the simplified alternative. At the given stage of the political fight black and white coloring of the foreign policy priorities was closely connected with striving “to get” to electors of different intellectual level, to provide electorate perception of party foreign policy conceptions [1, p. 92]. Unlike Russia, where actually all the parties treated NATO in a negative way, the Ukrainian peculiarity of the party evaluation of NATO is the spectrum diversity – from a most negative of the left-wingers to the vague one of centrist parties and positive one of the national-democratic forces.

Ukraine’s uncertainty concerning the ways of its development results in the inconsistency of the social-political course of the state, slackening the reforming processes and slowing down of the Ukraine joining the world economical system. The absence of the leading elite’s proper political will to the reforms causes ordinary people’s disorientation, supports nostalgic and restoration mood on the background of the economical decay. On this basis under the conditions of power fighting aggravation because of the elections 1998, the experts called “left-wingers in the Verkhovna Rada” and pro-Russian orientated politicians the main adherents of the integration with Russia among Ukrainian political elite [8, p. 9]. During the years of independence, the idea of the USSR restoration was politically exhausted. That is why, unlike the former elective campaigns, when the principal fight was held between political forces of right-centrist and left-centrist orientation (1994) and primarily the claims between centrist forces and pro-communist orientated left parties (1998) were fixed, the reverse method – making accent on the negative attitude towards NATO for positive comprehension of orientating to Russia and CIS – got special significance in the pre-election tactics of the left parties. They also used arguments of the economic character, in particular, expediency of the trade expanding with Russian Federation and other countries of CIS, restoration of the cooperating relations with the enterprises of these states etc.

At that time (1998 – O.B.) the left forces of Ukraine were rather organized and experienced for holding pre-elective campaigns. They relied on the Russian left-wingers’ considerable support and in the foreign policy the program provisions of the “left-wingers” proclaimed deviation from pro-Western orientations, restoration of the Communist regime or at least making alliance with the Russian Federation like Russian-Belarus one [10, p. 77]. Striving to fulfill this, left-wingers found some support among “Russian patriots” (in both Ukraine and Russian Federation) who deny Ukrainian identity until nowadays.

The left forces of Russian Federation used “reintegration” problems as much as they could, promoted attractiveness of the image of the Ukrainian left-wingers, supported all their acts like condemning NATO and world bourgeois imperialism.

On this background, centrist forces looked more scattered. In general, they followed the position of the Ukrainian statehood and its interests and found consensus with national-patriotic forces in these matters. Left-centrist forces pointed out the importance of such lasting good-neighboring relations with Russia (by the way, the majority of them are concentrated in the Central and Eastern Ukraine). The support of them by democratic-reformist forces of Russian federation was possible at the cost of some concessions, which touched on Ukraine’s national interests, though it could result in some reaction of the right-centrist forces, which were inclined to support centre only because of “left threat” [10, p. 77]. Characterizing right-centrist forces, we must take into consideration that they were mostly oriented to European and Western support and were inclined to follow the example of the Central-European countries and Baltic ones, besides they condemned the Soviet past and gave up all attempts of the USSR restoration. Moreover, they appealed and go on appealing to withdrawal from the CIS and support non-aligned status of Ukraine.

Completely opposite was the position of “right-wingers in the third Verkhovna Rada”, in particular of Narodnyi Rukh, which was the first – as long as the beginning of the 90-s – to support the idea of NATO expansion to the East and gradual changing of NATO from the defending bloc into the system of collective safety in Europe. The analysis of the authorities’ arguments gives opportunity to conclude that attitude towards NATO is also considered not only as independent problem, but in two broader contexts: as converging of Ukraine with Euro-Atlantic structures (mentioned program proves the necessity of integration simultaneously with EU and NATO and withdrawal from CIS), and also in the context of Kyiv’s position strengthening in the Ukrainian-Russian relations and in the triangle “NATO (virtually USA with its non-NATO maneuvers in the Central-European region) – Russia - Ukraine” [1, p. 94]. The provisions of the mentioned program are defined as one of the main components of the NRU pre-elective platform. It means that the matter concerning NATO took an important place in the fight of NRU for representing in the Parliament.

Right-radical forces of the national-fundamental direction were orientated to “own abilities” of the Ukrainian nation and declared that they were not going to find support overseas. The extreme right forces should not have been neglected. Though not significant, loud organizations belong to them and separately they do not have great influence, in general extreme right-wingers played an important role both as a teasing factor and as a destroyer of different taboos; very often they expressed secret thoughts of many political leaders. The majority of the ultra-radicals and considerate right-wingers shared common idea con-

cerning withdrawal of Ukraine from CIS and its joining any anti-Russian bloc. They are also adherents of tough, including nuclear component, conception of the national security.

For a long time the most radical and at the same time the most pro-NATO position has been the following one: "in general "yes", but ...", when on the Ukrainian home political arena the majority rejected the possibility of agreement (left-wingers and left centre, defending the position of the ideological irreconcilability), or (major part of the centre, right centre and right-wingers) declared lack of agreement, showing some fear concerning the safety of Ukraine in case of NATO expansion [1, p. 93]. Nowadays in some political conceptions of the majority of parties and their blocs of the centrism direction the attitude towards NATO is not determined at all, or characterized by reserved positive assessment (the priority of the "adhering to NATO" non-alignedness with emphasis on the possibility of converging with this organization in case of some foreign threat to the safety of Ukraine). It can be explained, to a great extent, by the political pragmatism of these not very powerful parties, which have to adapt, more than Narodnyi Rukh and the Communist party of Ukraine, to the ordinary people's opinions, adherents of the military-political cooperation with NATO and the states of Commonwealth [4, p. 111]. Anyway, the orientation exclusively on NATO or the military alliance with Russia at the head, will be fraught with enormous losses of the very centrist-oriented electorate for centrist parties.

Another topical problem, which causes a split in the Ukrainian electorate, is so-called "Russian question". Must Ukraine zeal for complete independence or it should unite with Russia again? In his 1994 pre-election program, L. Kuchma declared: "I consider the revival of the mutually beneficial economic ties with Russia and the former USSR states advantageous, simultaneously with the further improving of such ties with the states of the Western Europe and the USA" [5, p. 28]. Actually, the President was more pretentious and balanced at the same time, that is: ambiguous political game with the West was resumed again, which lay in the balancing policy between the West and Russia, to be more precise, between two concepts of collective security, the centers of which were to be NATO and Russia (Tashkent Treaty) [16, p. 50; p. 15].

Nowadays, the Ukraine domestic policy in its foreign policy dimension is purely pro-Russian-oriented. Why? Because the political clans' interests, business structures, which work with Russian raw materials, are closely connected with Russia, and interests of the party nomenclature, which is still at power, are closely connected exactly with Russia as well [8, p. 20]. The same spirit both in the Russian power structures and in the Ukrainian ones permeates these people. The Radians'ka history has not finished yet in Ukraine, like the Ukrainian "reconstruction" as well. Naturally, home economic difficulties greatly affect

this process; we need more dynamics to cope with them. Primarily, it concerns privatization processes, administration reform and investments. After the USA and the West having taken final decision on expansion of the Northern-Atlantic alliance, Ukraine faced the necessity – and at the same time it got the excellent opportunity – to determine precisely her national and political intentions and strivings, concerning the niche in the new European political structure, first of all, her own role in the process of formation of the collective security system.

Thus, we can make a conclusion, that in Ukraine itself, regardless a certain increase of pro-western sentiments amongst the national political elite, there is a lack of institutional barriers of the European identity values, of “the European choice of Ukraine”. The political bloc’s (having exactly the same name) loss during 1988 parliamentary election, like the opposite formation “Soyuz” flop, testifies the definite deactualization of the foreign policy orientations of the Ukraine policy for mass electors [9, p. 20]. This tendency reflects another problem, in particular, increasing split in the political elite’s value orientations and mass society in Ukraine.

The low level of the economic development of Ukraine remains the restraining factor on the way to Euro-integration. This process is added to and grows more complicated, under preserving the current strategy, actual absence of the perspectives of doing away with the lag behind the European countries. At present, the fact is that Ukraine does not possess the sufficient financial and technical resources, which could enable Ukraine to enter the new epoch of global modernization, to implement highly developed technologies, to involve sizable investments. A considerable part of the Ukrainian population did not support the way to Euro-integration. According to different assessments, from 20 to 33-37% of the Ukrainian citizens are for the idea of entering the European Union, primarily the representatives of young generation with higher education and students, and about 70% of the Ukrainians are afraid that fellowship in EU can incline the government to unpopular measures, directed onto state social programs reduction [12, p. 94].

Thus, nowadays Ukraine is hardly ever able to elaborate its policy concerning EU based on recognition of reality of fast entering the above-mentioned international organization. No doubt, this problem is still urgent in its further perspectives. However, there is no use of imposing the complex of “European expectations” on the public mentality, suggesting the integration into EU program as new brand national idea to the society. In that way, such Euro-integration projects would change from foreign policy strategy into one of the effective factors of domestic policy and, alongside, into potential source of long running political risks. Taking into consideration the fact, that in the nearest perspectives the radical changes in the European integration domain are improbable, and their positive impact on the Ukrainian economic state (and, besides on the population welfare) is problematic, the “European expectations” in

future can change into "Euroscepticism" [11, p. 94], and so into mass complex "unjustified hopes" with all corresponding consequences (anti-European sentiments rise, anti-democratic movements intensification, real integration into Europe braking etc.)

Making a conclusion, we can emphasize that all the mentioned factors point out into the unreliability of the Ukrainian foreign policy matter, which, figuratively speaking, is light, high up in the sky, above the land, without strong roots (grounds). The society is split into two parts, if not three ones. In addition, vivid foreign policy perspective is not worth mentioning about: one-half would curse; another one would approve it, no matter what would be suggested. Evidently, the Ukrainian people's mentality needs some time to realize finally what direction should be taken and what choice should it make.

Streszczenie

PARTIE POLITYCZNE NA UKRAINIE W PRZEDEDNIU I PO WYBORACH PARLAMENTARNYCH W 1998 R. I 2002 R.: ANALIZA ORIENTACJI W POLITYCE ZAGRANICZNEJ

Tematem artykułu Autorki jest analiza elementów stałych i zmiennych w polityce zagranicznej partii i ugrupowań politycznych na Ukrainie, szczególnie w kontekście wyborów parlamentarnych z lat 1998 i 2002. Na wstępie przedstawia te wydarzenia, które doprowadziły do nowych uwarunkowań i podziałów politycznych w Europie, Eurazji, a szczególnie Europie Wschodniej. Następnie przypominając dobrze znany fakt kluczowej roli partii politycznych w państwie demokratycznym, charakteryzuje ogólnie ukraińską scenę polityczną, odwołując się także do czołowych prac ukraińskich naukowców zajmujących się tym zagadnieniem.

W kolejnej części artykułu Autorka przedstawia mapę wyborczą z 2002 r, która jest zasadniczo zbieżna z upodobaniami wyborców od samego początku niepodległej Ukrainy. Wyróżnia podział na zachód (zorientowany nacjonalistycznie, pro-europejsko, i pro-religijnie, posługujący się ukraińskim, lojalny w stosunku do władz państwowych) oraz wschód (przeciwny opcji narodowej, pro-rosyjski i rosyjskojęzyczny, przedkładający wartości społeczne nad narodowe, kulturalne i religijne, wyraźnie wrogie, a przynajmniej obojętne w stosunku do władz). W kontekście partyjno-ideologicznym, zachód popiera ugrupowanie Ruch i niepodległość, a wschód – komunistów i integrację z Rosją.

Jednakże badania opinii publicznej od 1998 r. wskazują, że polityka zagraniczna odgrywała rolę wtórną w stosunku do wewnętrznych problemów społeczno-gospodarczych. Polityka zagraniczna w kampanii wyborczej we wspomnianym roku

obracała się wokół uproszczonych wyobrażeń, co do orientacji pro-europejskiej jak i pro-rosyjskiej, pokazując obie w barwach czarno-białych, przy czym w odróżnieniu od Rosji (gdzie wszystkie partie uznawały NATO za ucieleśnienie zła), na Ukrainie obraz tej organizacji (jak również w mniejszym zakresie innych czołowych państw i organizacji Zachodu) był zdywersyfikowany – od skrajnie negatywnego u partii lewicowych, do niezdecydowanego u centrystów i pozytywnego u narodowych demokratów.

Niezdecydowanie Ukrainy co do dróg rozwoju wynika z braku spójnej polityki społecznej państwa, braku konsekwentnych reform i opóźnieniu w dołączaniu przez Ukrainę do światowego systemu gospodarczego, co powoduje resentymenty społeczeństwa do przeszłości. Lewica, wykorzystując te skłonności, ukazywała dobre strony zbliżenia gospodarczo-politycznego z Rosją i organizacjami przez nią tworzonymi. Była przy tym dobrze zorganizowana, licząc na wsparcie swoich odpowiedników w Rosji. Natomiast centryści (dość rozproszeni) znajdowali sojusznika w siłach narodowo-patriotycznych w obronie ukraińskiej państwowości i jej interesach. Ponadto kierowali się przykładem państw środkowoeuropejskich i bałtyckich w ich orientacji pro-zachodniej. Jedynie radykalna prawica chciała opierać się na siłach miejscowych bez pomocy z zewnątrz.

Przez wiele lat większość partii obawiała się NATO, w przeciwieństwie do dużej części społeczeństwa, co najszybciej wyczuły partie centrystyczne. Kolejnym problemem dzielącym społeczeństwo jest kwestia rosyjska. Tutaj widzimy wyraźną pro-rosyjskość wśród ukraińskich elit politycznych.

Kolejnym wnioskiem jest rozbieżność elit politycznych z oczekiwaniami wyborców. Z drugiej strony niski poziom rozwoju gospodarczego pozostaje czynnikiem ograniczającym integrację z Europą. Pogłębia to zacofanie technologiczne. Budzi rozczarowanie u wyborców, co wyraża się w niskim poparciu dla integracji z Europą. Zwolennicy (od 1/5 do 1/3 ogółu wyborców) wywodzą się głównie spośród osób dobrze wykształconych i młodych. Z kolei aż 70% Ukraińców obawia się ekonomicznych skutków koniecznych procesów przystosowawczych.

Tak więc, Ukraina ma trudności ze stworzeniem spójnej, długotrwałej polityki pro-unijnej. Musi to być poprzedzone skuteczną polityką wewnętrzną, poprawiającą sytuację w kraju. Ponieważ widoczna poprawa w najbliższej perspektywie może być niemożliwa, istnieje obawa zmiany „oczekiwań europejskich” na „euroceptycyzm”.

W podsumowaniu Autorka stwierdza brak wiarygodności ukraińskiej polityki zagranicznej. Społeczeństwo jest podzielone. Mentalność Ukraińców potrzebuje czasu, aby ostatecznie uświadomić jaki kierunek polityczny należy przyjąć i jakiego dokonać wyboru.

TOURISM IN RURAL AREAS OF SLOVAKIA: ECONOMIC DEVELOPMENT AND/OR SUSTAINABLE DEVELOPMENT?

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Introduction

The current increased availability of leisure, increased rate of population's mobility as manifestations of a new life style, and interest in cognition of new territories, people and cultures have distinctly influenced the contemporary development of tourism. Official statistics quoting the numbers of visitors and share of tourism in the GDP show a continuous growth in many countries. The economic contribution for the hosting country and its inhabitants has been seldom questioned. Socio-economic development of any region, as well as development of tourism, was understood almost exclusively in the economic sense. However, in recent years we have experienced, above all in relation to environmental threat to the planet, a more sensitive approach to „administration“ of Earth resources is ever more emphasised. Awareness of the limits of economic growth is associated with introduction of the widely interpreted term *sustainable development*, which implies all economic activities of man. Ways how to efficiently harmonise the short-term economic ideas of development with middle- or long-term ideas of sustainable development (with the minimum risks of any nature for living conditions of future generations) are sought. Radical views moving between the extremes of utopia and scepticism alternate with moderate views, which stress the inevitability of change in thinking that should facilitate potential harmonisation of both approaches.

The principal aim of the article, which lies in finding place for tourism in sustainable rural development programmes, is divided, for pragmatic reasons, into several partial aims. It is necessary to define rural areas, to point to their current problems in Slovakia, to present the concepts of rural development with emphasis on developmental possibilities provoked by tourism and to confront them with the concept of sustainable development of tourism in rural areas.

Definitions of rural area and rural development

How to define rural area and its development? Univocal answers to these two questions do not exist in literature. B.H.M.Elands and K.F.Wiersum (2001) point to this issue in their study. They arrived at the conclusion that originally the common denominator of rural areas was the interaction of man and nature. Therefore, rural area was traditionally characterised by the presence of the specific set of agricultural and other natural-resource production processes. This however, is a too simplified form for the contemporaneous rural area constantly influenced by suburbanisation processes and the diminishing significance of agriculture. Both authors admit that „it is almost impossible to formulate one all-embracing, single, and objective definition of rurality.“

Both the OECD and EUROSTAT define rural areas in terms of population density. Both institutions make use of what is referred to as descriptive definitions of rural area. For the OECD, rural areas are those with less than 150 inhabitants/sq.km while EUROSTAT uses a figure of 100 inhabitants/sq.km.

The OECD has developed a classification of rural areas based on the percentage of the population of a country living in rural communities (typical descriptive definition). Three broad classes of rural areas or regions have been distinguished: predominantly rural (over 50 % of the population living in rural communities), significantly rural or intermediate areas (15% - 50 % of the population living in rural communities) and predominantly urban (less than 15 % of the population living in rural communities). The quoted classification was also applied when rural areas were singled out for the „Rural Development Concept“ in 1998, and in the basic document making possible for the Slovak Republic to apply for assistance from the Structural Funds of the EU - „National Development Plan“ of 2003. Thirty-nine „predominantly rural“ districts inhabited by about 48% of total population, 31 „significantly rural“ districts with 40% of total population and 9 „predominantly urban“ districts (covering only city districts of Bratislava and Košice) with 12% of total population of Slovakia (fig. 1) were singled out in Slovakia.

The second form of defining rural areas in Slovakia is based on the relationship between the urban and rural municipalities. In Census of inhabitants, houses and flats of 2001 there were 2883 municipalities in the territory of Slovakia. Thereof, 138 (4.8 %) municipalities possess the statute of town (or city). In 138 towns and cities of Slovakia, out of which 23 towns did not reach the adopted statistical limit of 5 000 inhabitants, 56.5 % of the total Slovakia's population lived in time of the last census. In spite of the fact that number of basic administrative units (*obec*) without the statute of town, i.e. rural communes was as much as 2 745 (95.2 %) and distinctly dominated in the settle-

ment structure of Slovakia, there lived only 43.5 % of the total population (fig.2).

Fig.1. Classification of individual districts of Slovakia (OECD methodology)

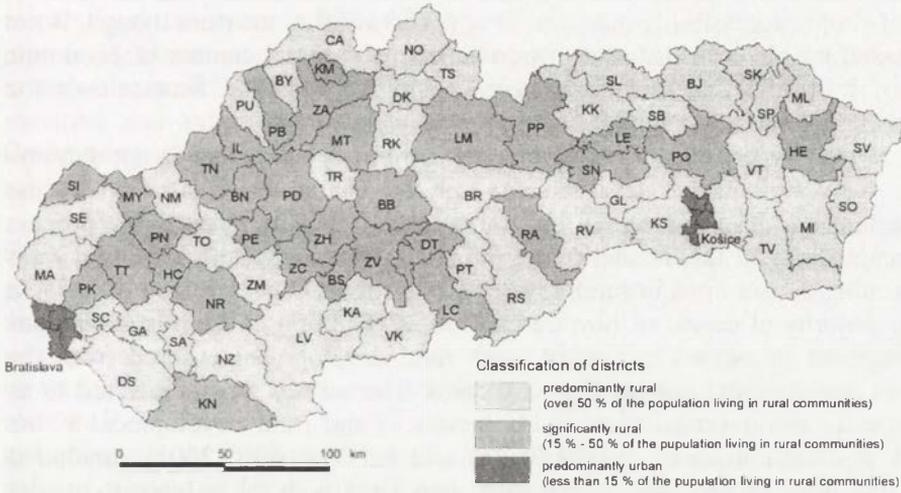
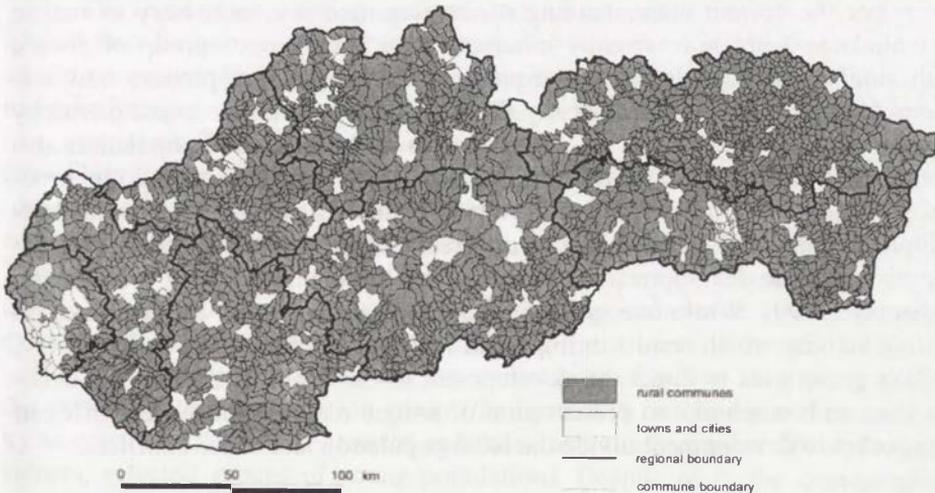


Fig.2. Rural communes versus towns and cities in Slovakia (legislation rules)



Like in other countries, the rural area of Slovakia is not homogeneous. Unfortunately, there is no study (according to my opinion) dedicated to the in-

ner differentiation of rural area by application of selected criteria of any nature. I believe that in future it will be necessary carry out research oriented to classification (partial or comprehensive) of rural area inspired by examples of other countries. For instance, in Scotland there exists national classification of rural space. Commuter, intermediate and remote rural areas are defined by application of simple accessibility measure. Simple accessibility measure though, is not expressed by physical distance of communes to regional centres of economic growth. It is defined as travel time necessary to overcome the distance from the rural commune to the regional centre.

Currently the term rural development (rural development is not synonymous with agricultural development) can be characterised as the process of reaching the desired future of the countryside. It usually refers to the process of strengthening of the liveability in rural areas. Essentially, there are two ways of reaching the set aims in rural development, effects of which are not isolated in the majority of cases, as they are interlinked. The first of them is exogenous development (top-down approach), with rural development ensured from the sources coming from outside the rural areas. The second way is referred to as endogenous development (bottom-up approach) and rural development is the result of local initiatives. B.H.M.Elands and K.F.Wiersum (2001) concluded that rural development was traditionally associated with the exogenous model of development. However, the need to strengthen endogenous development by stimulating local community initiatives and bottom-up planning processes is rather characteristic for the current rural development.

For the correct understanding of development it is necessary to realise that rural areas are not currently inhabited by a homogenous group of people with similar interests. In the consequence of suburbanising process new migrants from towns with diametrically different behaviour patterns and hierarchy of values must be added. Social differentiation of the rural area population also manifests, beside other, in differentiation of power in decision-making processes in the self-administered rural municipalities. Experiences show that development means different things to different people, while search for consensus regarding the developmental model of rural communes is often problematic (D.Storey, 1999). While one group interprets development as an extensive investing activity which results in improved material welfare of the local society, another group tries to direct the development toward conservation of the existing state with emphasis on preservation of unique natural landscape. Different approaches to development divide the local population and cause conflicts.

Some contemporaneous problems of the Slovak countryside

The issue of the rural development was given a minimum attention in the past. In the consequence of the widely promoted concept concerning concentra-

tion of population and jobs into towns and to what were a priori established *central communes*, a large part of rural communes were gradually depopulated. This concept was based on efforts to eliminate unprofitable cost of building the technical and social infrastructure in small rural settlements. The result was selective emigration of the young and qualified population followed by ageing of rural population accompanied by loss of interest in public matters. The only jobs available in majority of rural communes were those in agriculture, or in branch plants of industrial enterprises. Mono-branch economic structure, very sensitive and vulnerable to socio-economic changes, was clearly prevailing. Commuting subsidised by the State to relatively distant work places was widely accepted and exploited.

Rural areas in Slovakia, as influenced by the new socio-economic conditions, undergo distinct changes since 1989. Employment structure of rural population is changing. The most striking manifestation of such change is the drop of employment in agriculture and consequently the increase of agrarian unemployment. However, the available statistics for dynamics of employment in agricultural sector is not compatible and many quoted comparisons are not correct. It is known, that in 1989 almost 351 thousand persons were employed in agriculture. In 2001 (with transformation implemented) about 72 thousand persons worked in firms with 20 and more employees. The fact that the drop of employment in agriculture was not as dramatic, is documented by the following statistical data - in 2001 almost 174 thousand persons were employed by farms (results of structural census of farms).

The level of wages in agriculture started to decrease in 1990. While in the quoted year farmers as one of the employee group of the national economy received above-average wages (13 % over average wages), in 1998 average wages in agriculture amounted to only 76.6 % of average wages of the national economy employee. This figure responded to only 2.6 multiple of minimum wage (in: *Plán rozvoja poľnohospodárstva a vidieka SR*). Economic position of a person living in countryside as measured by income from his/her main economic activity has distinctly deteriorated.

By the end of the 1990s the long observed phenomenon of depopulation of rural space and ageing of rural population stopped. In some rural settlements even growth of population is now observed. Rural areas with their relatively intact environment, free space and low parcel prices become attractive both for the more well-to-do population group (they prefer to live in rational accessibility to economic centres of growth) and those who prefer quieter life style (pensioners, selected groups of young population). Despite of it, the demographic situation in countryside from the point of view of population reproduction is still unfavourable. This is also reflected in business activities of the local population and creation of new jobs which are stagnating. It is caused by lack of available capital which in addition limits loan opportunities. There also exists

a kind of dislike towards business risk which is typical for older and middle-aged generations. We can say officially displayed unemployment rate in rural area often is the result of apathy and passiveness of the rural people towards any activity oriented to radical improvement of their undesirable situation. This state is supported by unemployment support and/or social support together with illegal work of younger people at abroad.

Accessibility of centres/towns where political, economic and public life concentrate and the inevitable financial and time cost connected with commuting often emerges as the determining element for stability and life quality of rural population. As D. Michniak (2003) reports, in 2001 the distance to the nearest district town for almost 662 thousand inhabitants of 737 municipalities (rural and urban) was more than 20 kilometres. Thereof, almost 184 thousand persons living in 201 municipalities had to travel the double of the shortest distance (40 km). The shortest distance to the hierarchically higher ranking seats of regional administration (Bratislava, Trnava, Nitra, Trenčín, Žilina, Banská Bystrica, Košice, and Prešov) for 669 thousand inhabitants of 581 municipalities was 80 km and more than 100 thousand inhabitants living in 175 municipalities had to travel more than 100 km if they wanted to visit the seat of regional administration. Accessibility of district and regional administration centres represents only one of the accessibility aspects. Inhabitants of rural municipalities often commute to work, for educational purposes or in need of services to the nearest towns which are not seats of regional or district administration. This reality distinctly reduces the number of persons and number of rural communes influenced by large distance from the nearest centres concentrating work opportunities and services. In spite of it, the eccentric position of some rural communes and recent reduction of regional railway lines in Slovakia markedly determine the possibilities of their further development.

Tourism development as one of the (economic) forms of assistance to rural areas

Currently there are numerous studies which point to the possibilities of improvement of living conditions of rural population through development of tourism. P.Jordan (1992) in his extensive study concerning development of tourism in Slovakia and contributions of tourism to „economy characterised by a lack of capital and poor employment situation“ (according to my opinion economy of Slovakia, and especially rural economy of Slovakia is a typical case of this type of economy) leans on the study of D.R.Hall of 1991 and summarises them in generally valid points as follows:

- The tourist industry as a less capital intensive branch of economy creates economic activities and employment without much capital investment.

- The relatively small amount of capital needed enables not only big enterprises and public bodies, but also a lot of individuals to participate, even in the way of a second profession. Investment, participation, revenues and risks are widely spread.
- As capital input is relatively confined it can soon be exceeded by revenues. Tourism therefore serves to create new capital, which could be reinvested, also into other branches of the economy.
- Tourism is labour intensive comprising mainly personal services, which cannot easily be mechanised and automated. More than industry and agriculture it is able to absorb unemployment.
- Tourism needs a larger share of unskilled workers, offering jobs, e.g., to industrial workers unemployed or underemployed recently without much vocational training.
- Tourism creates employment not only in its own sphere, but also in other branches of the economy using products and services of transport, construction, food – and other consumer goods - industry, trade and agriculture. This multiplier effect is estimated to be in the size 1:1.4 to 1:1.8, that means that one person employed in the tourist industry corresponds to 1.4 or 1.8 persons employed as an indirect effect of the tourist demand in other branches.
- Tourism acts as a catalyst of social change, by permitting greater and closer interaction between the host population and the outside world.

These effects of tourism on a national economy are favourably supplemented by its support to the regional development policy:

- Tourism can be activated in regions not favourable for other branches of the economy. The lack of industry and intensive agriculture makes a region even more suited for tourism.
- Tourism can be combined favourably with alpine agriculture providing alpine farmers with a second income. It prevents them from abandoning their farmsteads and from emigration. In this way tourism contributes not only to preserve the traditional appearance of cultivated landscape there, which is not the least of ecological importance.
- Tourism helps to improve the technical infrastructure of rural areas (roads, transport facilities, telecommunication network, canalization, etc.) in this way improving the living conditions of the local population.
- Tourism leads to the establishment of service facilities like shops, restaurants or entertainment facilities available also for the local population.

The presented approach univocally points to the economic contribution of tourism development for local population. On the other side, there are numerous studies which also mention the danger of overexpansion of tourism. It may comprise a high degree of seasonality in tourism, which supports instability of employment and leads to time-limited emigration, or the problem

of negative impacts on the environment. Conceptions oriented to the sustainable tourism development may be the solution.

The conception of sustainable tourism and sustainable rural tourism

The World Tourism Organisation has adopted the sustainability approach and defined sustainable tourism as follows:

„Sustainable tourism development meets the needs of present tourists and host regions while protecting and enhancing opportunities for the future. It is envisaged as leading to management of all resources in such a way that economic, social and aesthetic needs can be fulfilled while maintaining cultural integrity, essential ecological processes, biological diversity and life support systems.“ G.Vereczi (2002) has processed the quoted definition into the following form: „ ... sustainable tourism should maintain, and improve, where needed, the overall quality of environment, the natural and cultural heritage of tourist destinations, ensure long-term profitability for tourism ventures and a wide distribution of economic benefits among the local community.“

The both definitions suggest complexity of the term sustainability. T.Rátz and L.Puczkó (1998) discern four types of sustainability: ecological, social, cultural and economic. *Ecological sustainability* means that tourism development does not cause irreversible changes in a given destination's ecosystem. *Social sustainability* refers to the ability of a community to absorb tourism (both the industry and the tourists themselves) without the creation of social disharmony. *Cultural sustainability* in the context of tourism assumes that a given community is able to retain or adapt their own distinctive cultural traits against the pressure of both the so-called "tourist culture" and the "residual culture" of the visitors. *Economic sustainability* refers to a level of economic gain from tourism that is sufficient to provide an appropriate income for the local community (compared to the inconvenience caused by the activities of the tourism sector) and to cover all the costs of any special measure taken to satisfy the tourists. According to authors, the different aspects of sustainability do not compete, but must be seen as equally important.

Likewise, interpretation of the term „rural tourism“ is equally broad. For instance, according to M.Vaniček (2001) rural tourism is based on active use of rural environment and settlement for recreation and tourism, while it contains also elements of *cognitive tourism* (familiarisation with rural way of life, forest and agricultural activities). From the point of view of its development he prefers the bottom-up approach, and states that development of rural tourism depends considerably on application of the own initiative of communes - communal self-administration, inhabitants and local businessmen.

T.Rác and L.Puczkó (1998), also tried to define „rural tourism“ in their study and arrived at the conclusion that defining it as *"tourism that takes place*

in the countryside" would be a simplification. They rather opine, „*this definition does not include the complexity of the activity and the different forms and meanings developed in different countries*“ and inspired by the studies of foreign authors they adopt the definition according to which *"rural tourism includes a range of activities, services and amenities provided by farmers and rural people to attract tourists to their area in order to generate extra income for their businesses"*. This definition of "rural tourism" is also accepted in Slovakia.

Responsibility for the development of rural areas and rural tourism

Responsibility for development of rural areas and rural tourism of Slovakia is shared between several sectors (agriculture, environment, regional development, economy). However, this fact is perceived very negatively among experts, because competencies are not clear and there exists competition between the individual ministries. Ministry of Agriculture of Slovak Republic, which approved the document Rural Development Policy, plays the most important role. The basic objectives are defined in the quoted document as follows:

- to ensure appropriate living standard and improve the quality of life for rural inhabitants, by the creation of good and convenient social conditions;
- sufficiency of job opportunities and adequate incomes through the development of economic activities in the fields of agriculture, forestry, water management, processing industry, traditional crafts, services and *tourism*;
- protection and creation of a sound environment;
- conservation of cultural heritage values of the rural areas and the country (in: Plán rozvoja poľnohospodárstva a vidieka SR).

The quoted Ministry also administers SAPARD, the pre-accession fund of the European Union, which, however, is rather oriented to support the development of agriculture than integrated rural development also covering development of rural tourism. On the other side, Slovakia most probably will not be able to draw accessible financial assistance from the EU because of lack of project's quality.

The only tool of integrated rural development in the framework of the EU rural policy is the LEADER Programme, but its form is not that of pre-accession fund. The LEADER Programme is based on the principle of partnership (co-operation between the state administration, self-administration, business entities and non-governmental organisations) and support of local initiatives. It represents bottom-up approach to development of rural areas and it is destined above all to economically underdeveloped rural regions. According to the non-governmental Rural Parliament and the Rural Development Agency, „this tool better than other tools, facilitates co-ordination of socio-economic development, it supports harmonisation of decision-making and investing proc-

esses, increases administrative, managing, and programming capacities of people and helps building of civil society in rural areas.“ It has been attributed a special importance in the context of rural tourism development. Unfortunately, it is not altogether accessible to the Slovak Republic, because the EU considers the 2004-2006 period too short for administration of the Programme at the national level (in: Vidiecky parlament).

The expectations associated with development of tourism in Slovakia area are currently connected with its contribution to the economic development of the state and the individual regions. Tourism is viewed as the perspective industry of the Slovak economy. The Ministry of Economy of the Slovak Republic is the central administrative body with responsibilities for tourism policy. It has prepared the National Programme of the Development of Tourism in Slovakia, approved by the Government of the Slovak Republic in 2001. The principal strategic objectives of this Programme are:

- to increase the competitiveness of Slovakia’s tourism and to reach the level exceeding the European average;
- to restore the growth rate of domestic tourism;
- to increase the length of stay;
- to improve the structure of visits in respect to the economic benefits and outcomes from tourism;
- to follow the main developmental trends in world tourism industry;
- to deal especially with the following priority sectors: summer recreation in mountains, winter sports, and cultural tourism and spas, and from the point of view of some regions and *rural tourism*;
- to implement the cross-border co-operation with the objective to coordinate activities in respective regions;
- to preserve natural and cultural growth potential with the ability of being used all year-round (in: Národný program rozvoja cestovného ruchu v Slovenskej republike).

The Government declares its support to the development of tourism as one of the economic policy priorities and consequently it adopted different supporting programmes which should help the process. They include, for instance:

- Support to Enterprise and Industrial Policy;
- Support of Small and Medium-Sized Enterprises;
- Support of Foreign Direct Investment Inflows in the Slovak Republic;
- Pilot Grant Scheme of Tourism Development – for SMEs in tourism, for local and regional tourism associations, municipal and town authorities and non-profit organisations.

The most recent form of the governmental and European assistance to tourism development in Slovakia is adoption of the *Pilot Grant Scheme of Tourism Development*, administered by the National Agency for Develop-

ment of Small and Medium Enterprises. Economic subjects, with means available for co-financing of investment (50 % share) or non-investment (25 % share) projects, will be able join this Programme, which is a kind of preparation to drawing finances from the Structural Funds of the European Union.

The investment project can be submitted by small and medium businessmen, non-investment projects are reserved for associations of tourism. The indispensable element of successful application for grants is a quality preparation of the projects which in case of investment projects is focused on development of the infrastructural basis of tourism (construction of new accommodation or catering facilities, increase of the level and restoration of the existing facilities, development of facilities involved in health care, or active and passive relaxation of tourists). Specific examples of support requiring the applicant's 50 % share of co-finances are investment projects which concentrate on development of tourist attractiveness and production of plans (to exploit cultural heritage) enhancing the visiting rate of a particular municipality or region.

Associations of tourism should, as applicants for grant support, orient their non-investment projects to the area of plans of tourism development, the area of still underestimated market research and preparation of advertising material which strengthens competitiveness of the particular municipality or region. Presentation of tourist offer and promotion of territory by means of websites is now quiet common in the world communicating by Internet. Internet, along with participation at different fairs of tourism considerable contribute to promotion of territory and its natural, historical and cultural assets. All activities directed toward increase of information level of potential visitors can be presented in form of non-investment projects (in: *Národná agentúra pre rozvoj malého a stredného podnikania*).

Conclusion

Slovakia is the country with unusually appropriate conditions for development of tourism. Visitors are attracted by attractive natural environment and above-average concentration of cultural and historical monuments. On the other side, there are important drawbacks in infrastructural basis of tourism, promotion of Slovakia and its regions, in quality and structure of services provided, and the level of care about tourists. Tourism now is one of the important industries in Slovakia. It is estimated that it represents an about 4 % share in gross domestic products while the partial shares of urban and rural tourism are not known.

The need to develop rural tourism is based in the current complicated socio-economic situation of rural population. Ways how to revitalize the rural area and enhance its attractiveness for potential immigrants with interest to solve its problems, are sought. It is necessary to increase assertiveness of rural popula-

tion, its trust in own capacities and to motivate it to overcome problems, acquire education, and to change its thinking.

The governmental programmes with economic development of rural area as one of their priorities emphasise diversification of economic activities including creation of new work opportunities in the sphere of tourism. Tourism is generally perceived as some kind of universal solution to all problems of rural area. However, the long years experience showed that reality is often very different from idealistic imaginations. In order to improve the existing situation it is inevitable to understand rural area as the space that is distinctly differentiated from the point of view of tourism potential. It is also necessary to view Slovakia in the context of European implications, i.e. in the context of competition on international tourism market. It is necessary to map (and internationally compare) not only the tourist offer of Slovakia but also domestic and foreign demand for rural tourism in Slovakia. The last but not least is important to search the answers on the following questions which are connected with the creation of local and regional plans of sustainable development: In what direction should the sustainable tourism develop in distinctly differentiated rural areas of Slovakia? Are there ways of harmonising the interests of population living in rural area with temporary present tourists? The answers to the above quoted questions will certainly suggest how to satisfy the widest possible spectre of (often) various interest groups that try to exploit rural area also for tourism.

Translated by H.Contrerasová

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Streszczenie

TURYSTYKA NA OBSZARACH WIEJSKICH SŁOWACJI: ROZWÓJ GOSPODARCZY CZY RÓWNIEŻ ROZWÓJ ZRÓWNOWAŻONY

Słowacja jest krajem z niezwykle dobrymi warunkami dla rozwoju turystyki i dlatego nic dziwnego, że obecnie turystyka stanowi ważną gałąź gospodarki narodowej. Ocenia się, że jej udział wynosi 4% ogólnego PKB, chociaż nie są znane poszczególne udziały turystyki miejskiej i wiejskiej.

Na Słowacji wyróżniono 39 dystryktów o charakterze „głównie wiejskim”, zamieszkałych przez ok. 48% całej ludności, 31 dystryktów o charakterze „w znacznym stopniu wiejskim”, zamieszkałych przez 40% całej ludności, oraz 9 dystryktów o charakterze „głównie miejskim” (obejmujących jedynie dystrykty miejskie Bratysławy i Koszyc), z 12% całej ludności Słowacji (rys. 1).

Główny cel tego artykułu, który polega na znalezieniu miejsca dla turystyki w programach zrównoważonego rozwoju wsi, jest podzielony, ze względów pragmatycznych, na kilka celów częściowych. Należy zdefiniować obszary wiejskie, aby wskazać na ich aktualne problemy na Słowacji i przedstawić koncepcje rozwoju wsi z podkreśleniem tych możliwości rozwoju, które są powiązane z turystyką oraz porównać je

z koncepcją zrównoważonego rozwoju turystyki na obszarach wiejskich. Inne cele częściowe dotyczą analizy postaw organizacji rządowych i pozarządowych w stosunku do zagadnienia rozwoju turystyki na wsi.

Termin rozwoju wsi można scharakteryzować jako proces osiągnięcia pożądanej przyszłości krajobrazu wiejskiego. Zazwyczaj odnosi się do procesu poprawy warunków życia na obszarach wiejskich. Odpowiedzialność za rozwój wsi i turystykę na wsi jest na Słowacji podzielona pomiędzy kilkoma sektorami (rolnictwo, środowisko, rozwój regionalny, gospodarka). Jednakże jest to postrzegane bardzo negatywnie przez ekspertów, ponieważ podział kompetencji jest niejasny, a pomiędzy poszczególnymi ministerstwami istnieje rodzaj rywalizacji. Chociaż Ministerstwo Rolnictwa Republiki Słowackiej odgrywa najważniejszą rolę, to Ministerstwo Gospodarki RS jest centralnym organem administracyjnym odpowiedzialnym za politykę dot. turystyki. Najnowszą formą pomocy rządowej i europejskiej w rozwoju turystyki jest przyjęcie *Pilot Grant Scheme of Tourism Development (Pilotażowego planu grantów na rzecz rozwoju turystyki)*, który stanowi przygotowanie dla uzyskiwania finansów z funduszy strukturalnych Unii Europejskiej.

WORKING MIGRATIONS TO AND THROUGH SLOVENIA FROM THE »EAST«

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1. Introduction: Migration flows as european hope and fear

In only one year before the great enlargement of European Union the political structure of old continent will change radical. Two Europes: EU and other european countries take some questions about the future communication in space, which were united just a few years ago (former multinational states – federations Soviet union and Yugoslavia) or cooperative, tomorrow will try to searching for a new forms for normal crossborder colaboration. One of most important negotiating questions of EU-candidate countries were and are migration patterns. The outside »schengen« border of EU has the aim to protect the »schengen area«, it means the european economy, labour market, social and cultural rights and other benefits of european society. Migrations are ever important human exchange with economical, demographical, cultural, social and political effects and that s why ever represent a competition. Working force in eastern and southeastern part of Europe is far cheaper than in central- and westeuropean countries. Because of high percentage of unemployment in easteuropean countries, the prognosis show that those people represent potential working migration (or potential immigrant in general), who will knocking on EU-doors. Particularly in period of economic stagnation, the EU-members are afraid of this relatively well qualified and much cheaper workers from the east. Working migration (or imigration in general) is european fear and strong control on schengen borders should protect european labour market. On the another hand, very low demographic increase (in many european countries the natural demographic development is negative) point to serious troubles in functioning of european societies, if they will not »import« new workers. Particularly on the labour market, relatively high level of exchange of working force could bring economical increase and positive social development.

Migration process means also a numerous of personal destinies of people, searching better job, higher salary, educational opportunities, new business occasions, new partners etc. This, maybe more subtle part of migration phenomenon shows his consequences quickly and for a longer period. It create interpersonal connections among people from different countries, what can we estimate as improvement of human potential. Especially in border regions, yesterday, today and tomorrow.

One of european doors for working migration flow is also Slovenia. Located near the poorest part of Europe, near Southeast Europe, in 2004 this country will attract a numerous mass. Some of them search his dream in Slovenia, some of them will use its territory for a transit. What a country is Slovenia, in context of working migration flows?

2. Slovenia: From emmigrant nation to immigrant country

The Slovenians belong to the European nations with the highest proportion of emigrants. The most intense emigration began in the period of the first demographic transition in the second half of the 19th century. At that time, the population of the most of the European nations highly increased, but the growth of the Slovenian population was only moderate. The majority of their natural increase kept moving to industrial regions in Central and West Europe and across the ocean, to the USA in the first place. At that time, Slovenia underwent a radical modernization thanks to its exceptional transport-related and geopolitical position along one of the most important European axes running from the heart of Central Europe towards the North Adriatic. But, the industrialization process was too slow and its extent too small to keep the local labour that flew to foreign countries from the overpopulated agrarian areas. Slovenian regions were typical areas of emigration. Thus, in the mean second half of the 19th century, about 500,000 people emigrated. Some of them returned but the majority settled in a new "homeland" for good.

Emigration continued to be the prevailing trend even during the following five decades of the 20th century. The Slovenian historical experience also knew a rather numerous and influential group of political emigrants. The first, antifascist, emigration mostly went to Canada, Argentina and Australia. Due to the worldwide economic recession, the Slovenian emigration then slightly declined, but it still considerably exceeded the immigration (Genorio, 1993). During World War II and after it, mass migrations of various groups of people began on the territory of the present Slovenia, which eventually caused radical changes in the ethnic and social structures of the population. Concurrently, the role was changed of individual regions in Slovenia, because its former position in the central European space changed into a buffer zone between two antagonistic military and economico-political systems, in addition to Austrian neutrality and

Yugoslav (and consequently Slovenian) non-alignment. Border areas in the neighbouring countries also underwent lively migration processes. In fact, the migrations on the Slovenian territory were only part of a complex process that took place in the broader European space. Owing to encouraged migrations, the character of the Slovenian territory and the border areas in its neighbouring countries changed a lot. Therefore, some areas became ethnically much more homogeneous, some were completely vacated, but almost all of them became culturally and economically much more vulnerable owing to migration shocks and new geopolitical conditions (Gosar, 1993). Though having been formerly centers of immigration, some of them even transformed into areas of emigration.

However, the situation in Slovenia differed from the rest of Europe; in the course of a few decades after World War II its society transformed from an entirely agrarian to industrial society. Rapid industrialization caused numerous social and spatial changes in Slovenia which were completed in a single-generation's time, while in West-European societies the period of three generations, i.e. 60 to 70 years, was required for such changes. Forced industrialization caused a rapid abandoning of agrarian activities and concurrently stimulated the urbanization process. The transformation of agrarian population into non-agrarian was accompanied by some specific features. Because of the land-property restriction (10-hectare maximum), the farms could not be enlarged. With the introduction of modern technology to agriculture, the prices of final farming products grew ever higher, but the farmers could not earn enough to cover the production costs, let alone to grant themselves proper existence. Consequently, a typical worker-peasant structure developed, which was supported by the concepts of dispersed industrialization (numerous smaller industrial plants) and polycentric development. Both these concepts contributed to rapid abandoning of agrarian activities and full-time employment of active population, and concurrently stimulated an ever more intense migration of labour. Extensive zones of daily migration of labour were formed; these commuters used public transport at the beginning, and mainly their own cars from the eighties onwards (Klemenčič, 1972). Industrialization and various other activities offered numerous new jobs in which the locals were not particularly interested; there were also jobs in the army and jobs in certain branches of state administration which were mainly taken by immigrants from the former Yugoslav republics. In two decades only, Slovenia developed into a net importer of labour and acquired all the features of an immigration society (Klemenčič, 1992). However, the trend of emigration (either temporary or permanent) from Slovenia also continued. Thus, the Slovenian society was an emigration-immigration one. A remedy for concealed unemployment in Slovenia was a rather constant and relatively high percentage of *gastarbeiters*.

In last decade, the number of working immigrants increase slowly, but their national, educational etc. structure is more and more colorful. It should not be forgotten, that in early nineties, in Slovenia approximately 200.000 refugees from conflict areas from former Yugoslavia found his provisional place. Some of them (particularly those with relatives settled here before breaking Yugoslavia) rest here. Slovenia became typical immigrant community and attractive country, especially as a future EU member. In this case the debate is about the immigration transit, with final target somewhere in central Europe and not here.

Ever greater needs for building and restoring the ever-insufficient infrastructure on the one hand, and modest accumulation of private capital due to mistrust in banking systems, inflation trends, and the habits of "immediate consumption" on the other, made the society seem richer than it actually was. Work-intensive industry began to lag behind on the organizational, technical and capital-related levels. The eighties brought the merciless awareness about the rapid lagging and indispensable changes. This triggered off the economic and political crisis of former Yugoslavia, with sharply increasing inflation and unemployment. Then followed the disintegration of the former state, accompanied by a series of local wars and brutal civil and military clashes based on ethnic issues. Slovenia gained independence, but also faced the fact that a considerable part of its former market and the source of raw-materials simply disappeared. On the other hand, the ongoing integration of European countries into the European Union issued numerous new challenges which were accepted by Slovenia as well. The assumed obligations do not only require coordination of norms and practices with those that are in force in the EU, but also the creation of human, material, capital and organizational potentials which can make the Slovenian society competitive and successful. Slovenia was able to go through the transition period thanks to its traditional perseverance in both aspects, economic and ethnic. In this process, migration trends were of much greater importance than is usually assigned to them. Peddlers from Ribnica, Slovenian marron roasters in Vienna, seasonal workers from Prekmurje - all of these were only the beginners of a widespread and very important process of social survival, which helped to maintain the economic vitality of Slovenian people in different historical periods. Thus, the tradition of transborder migrations of labour is one of the key subjects in the analysis of Slovenian spatial and social development. Even in the initial period of establishing and developing the independent Slovenian state they formed an important economic basis. Migrants brought capital, experiences and sometimes also partners, and above all, they helped others to become acquainted with the manner of work and way of life in western societies. The importance of open borders should be emphasized because they offered numerous possibilities to the locals. However, across the same open borders capital and people were also flowing away, and together with

them the developmental potential drained from time to time, too. Viewed in this light, daily transborder migrations of labour are only part of a much older, richer and quite diverse tradition of work-related migrations practiced in the past.

3. The phenomenon, ballance and structure of working migration to and trough Slovenia

3.1. The phenomenon

The phenomenon of working migration has old tradition in slovenian space. Above mentioned changes Slovenia from typical emmigrant nation to immigrant country and society just underline some characteristics of this old process of human exchange.

What make Slovenia interesting for working- and other forms of immigration? There is certain not simply economic reason (or reasons) than very complexive set-up of various push- and pull factors, which influences to someone-s decision for working abroad, in our case in Slovenia. Those motivs- factors are:

Push (impelling) factors:

- information about the working opportunities
- determination of personal prosperity (it could be also pure dream!)
- bad personal or familiar circumstances (each moving outside local community is better than staying there)
- economical or /and political unperspectiveness in own region/country

Pull (attractive) factors:

- free working places (some jobs, not very attractive for domestic slovene population)
- expected better salaries
- linguistical and (less) cultural nearness (members of different slavonic nations have some advantages)
- alreedy built social network (for easier acces to job and living in country; for workers coming from former yugoslav republics)
- relatively high standard of living and social welfare (in comparaision with emmigrant countries)
- social and juridical safety
- expected new experiences, knowledges, connections and partners; they can use it when returned back home or (mostly) for catching the same or similar job somewhere in central or western Europe)
- working abroad as a learning period, in order to take personal and/or institutional connections and partners.

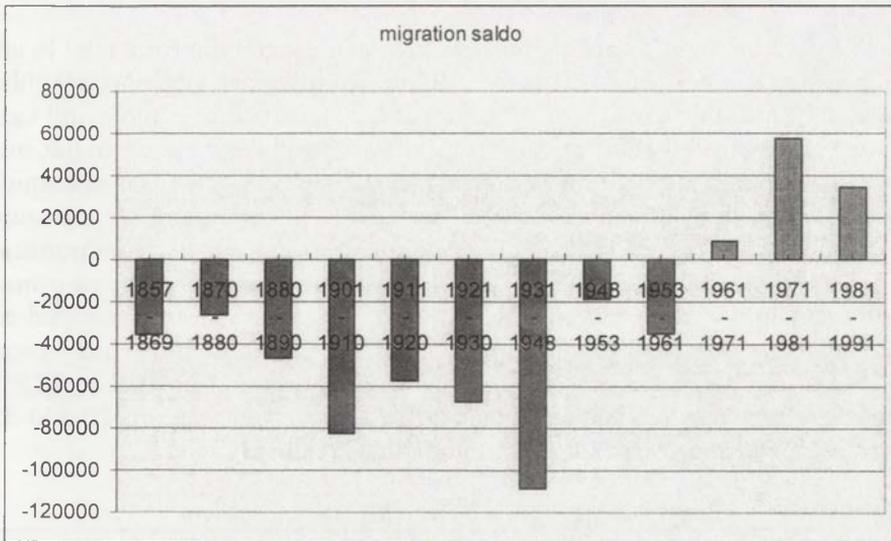
Among working immigrants coming to and through Slovenia the most of them have special working permission (permanent or limited). Slovenian agency for employment knows more than 40 different permissions, for different countries, groups, for different sectors of employment and work. Some of them are detached, sent by enterprises in home country. Other group is a group of seasonal workers (in touristical resorts in a season, in agriculture and other works with strong seasonal character). A lot of them are workers illegally (they come legally and work illegally). Third group represent various forms of working crossborder commutation (they travel to and from work every day) and is a typical phenomenon of border regions. Last groupation include all kind of illegal work, but not necessary also illegal immigration. This form is of course just estimated and we do not know exactly, how many they are, what exactly they do and where, how much they earn. Some of those »businesses« are not only field of black market, than pure organised criminal (smuggling weapons, drugs, some goods, women- and children-market, financial manipulation etc.).

3.2. The ballance

Slovenes are emmigrant nation and Slovenia is a immigrant country and society. Since sixties in 20th century, Slovenia has positive migration ballance. But the number of s.c. »gastarbeiters«, periodical workers (for a few years) were increasing; in census 1991 Slovenia has near 57.000 workers and their members in foreign countries. They were not all of them slovenian citizens, just aproximatelly 43.000 they were. Slovenian (at that time still yugoslav) statistics treated them not as a emmigrants.

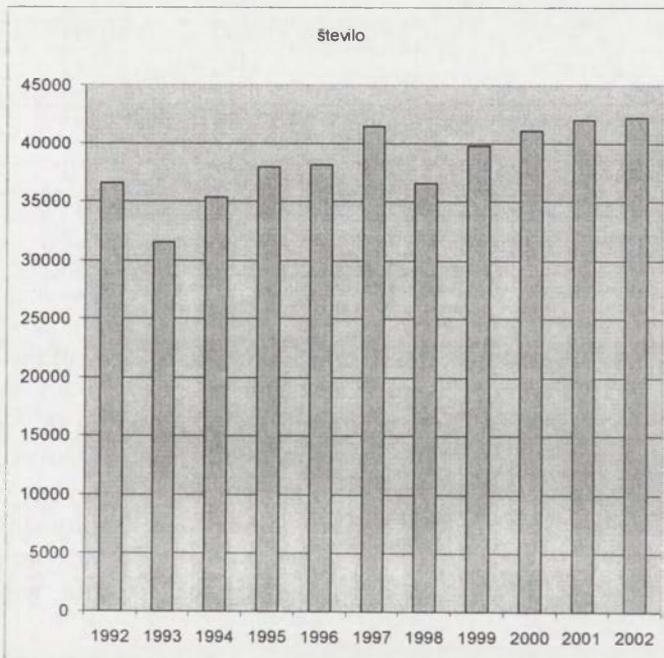
The last census in 2002 slovenian statistical office take the eurostat-criteria and make those »gastarbeiters« as emmigrants. Even this statistical measure was introduced, the migration ballance in slovenian space rest positive. Just in a period 1990 – 1994 the slovenian migration ballance was negative (the refugees are not encountered there, of course). Since 1994 the number of working immigrants increase slowly again. In last few years, the number of those workers is around 42.000 (counted by various working permissions) and aproximatelly 10.000 who work illegally or semi-legally. This is evident more than 33.000 slovenian workers abroad, together with round 14.000 crossborder commuters; among them round 8.000 works illegally or semi-legally (without official working permission) (see also in: Zupančič, 2002).

MIGRATION BALANCE ON SLOVENIAN TERRITORY



Source: *Geografski atlas Slovenije*, 1998

THE NUMBER OF WORKING IMMIGRANTS IN SLOVENIA IN LAST DECADE



Source: Zupančič, 2001; with addition (Zavod za zaposlovanje, annual report, 2002)

3.3. The structure

Who are people, knocking on slovenian door, searching for a job? In ethnic or regional origin most of them sourcing from former jugoslav republics (round 94 %). From year to year the regional /ethnic structure is more and more colorful. Aproximatelly half of them comes from Bosnia and Hercegovina, next 21 % from Croatia, 16 % from Serbia and Montenegro, 8.4 % from Macedonia and 3.5 % from transitional countries. The same is in comparing sex structure; men predominant, except in some areas or countries (especially from transitional countries). In general there are 12.8 % of women. The percentage of women depend certain not of sexual equality in home societies (also in developed countries the percentage of women working migrants is evident low). But it changed. In last five years the percentage of women increased from 10.1 to 12.8%. Among the migrants predominant younger people, between age of 20 and 35. Later they move and search for new opportunities relatively rare.

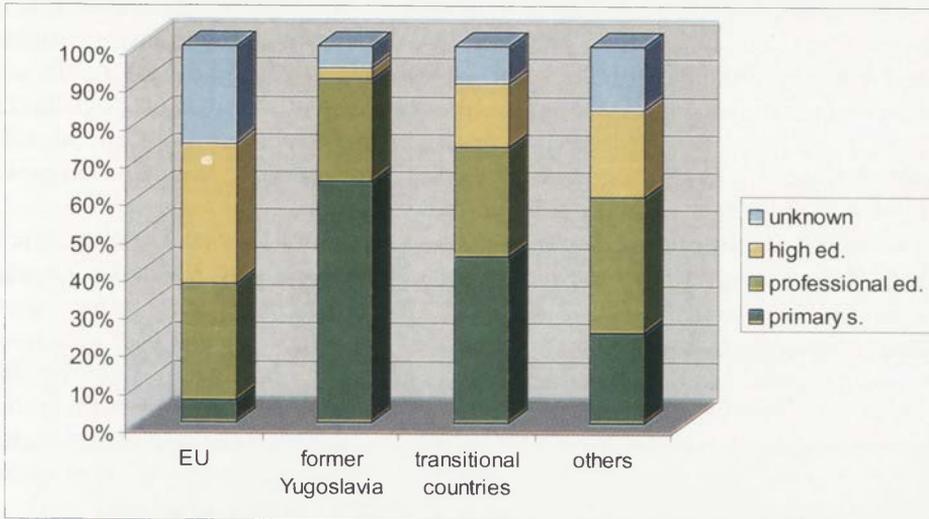
Table 1. Working immigrants to Slovenia by national / regional origin

country / region	male	female	together
EU members	420	143	563
other european countries	8	3	11
transitional european countries	739	687	1.426
Croatia	7.104	1.834	8.938
Bosnia and Hercegovina	19.138	1.778	20.316
Serbia & Montenegro	6.018	709	6.727
developed oversea countries (USA...	59	14	73
Latin America	16	17	33
Asia	220	80	300
Africa	26	4	30
without citizenship	22	10	32
together	36.711	5.391	42.102

Zupančič, Delovne migracije iz držav EU v Slovenijo, 2001 (research project), 13-15

Educational structure shows very well the needs for working force according to their qualification. The great demands are on those operations, where domestic slovenian workers are not interested to work on. In this group predominant workers with low school education (more than 60 %) and practically without professional qualification. They find job because they are cheap. Other and now evident increasing group are people with high qualification, specialist on some domains, like technical inteligentsia, technologists, artist, in sport, medicin, business etc. It is estimated, the educational structure will increase in the future.

Graph. Educational structure of working immigrants in Slovenia



Source: Zupančič, 2001, 14-19

Near mentioned number we have almost 15 % of immigrant workers working illegally or semi-legally. It seems a lot, pointed to a big black marked of working force, but in fact it is not. The percentage of this phenomena is quite near for example in Italy (northeast border part). It depends, whatever includes the term »work« and it is not the same as »employed«. Quite numerous people has second, never and nowhwrw legalised job, maybe from time to time, periodically or occasionally. Among the working immigrant is the same. The great number of those »illegals« help older people, do some works on agricultural domain, translate something, sell the goods door-to-door, make some propagan-da, make a business connection, they are very offen visiting artists in smaller communities and similar. Accoring to this desription it is clear, that they are not the poorest social group, and are manytimes well qualified. Some groups (Chinese, Albanians) have in his shops and locals employed manytimes legally some people and some not (Zupančič, 2001; with some additions).

4. Conclusion

One of most significant feature in migration process is the effect of s.c. »chain migration«. Each group of migrants brought something new: cheaper working force and new experiences influenced more or less positive to economic and social development. In order to remaind developmental tempo in was necessary to search in each stage for new, cheaper workers. After a years, living in country (society), the immigrants reached similar way of life and have similar

demands, waht is a result of integration process among them. But the immigrant groups, particulariy in case they are numerous and territorially concentrated, remain some specifics in their way of living. For example they remain national food, cooking and other cultural habits. In Slovenia, by this way, after a decade of stronger immigration of people coming from southern part of Yugoslavia, then came a group of Albanians and brought some specifical shops and klokals with »balkan« food (the same is for example in Germany, when well known »kebab« follow after mass of immigrant turkish origin.

Southeastern Europe counts to the poorest part of Europe, is still political untabil because of strong tensions to interethnic conflicts. Bosniaks, Croats, Serbs, Montenegreens, Macedonians and Albanians will certain continue searching their opportunities in slovenian space: much more, because of attractiveness of Slovenia as one of EU member. The transit character of working migration flow has the same importance. In last years, among working immigrants the number and percentage of Chinese, Indians, Pakistanians and others increasing, as well those from Ukraine and Rusia. Slovenia has in his immigrant policy the »quote sistem«: 5 % of yearly estimated common employed workers can be immigrant workers with differnt working permission.

What will EU do, what a strategy should follow, ewill be perhaps one of neuralgic point of common europena debate. In general, there are two main solutions:

- create a developmental strategy and make a structural fonds and help for most emmigrative neighbours (this is especially important for countries, which will stay out of entlarged EU)
- follow the principles of relatively closed labour market.

Both opportunities have more variants, depending especially of labour market demands (needs). In each case, the migration process will remain high priority in european economical, spatial, social, cultural and political life.

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Streszczenie

MIGRACJA ZAROBKOWA ZE „WSCHODU” DO SŁOWENII JAKO KRAJU DOCELOWEGO I TRANZYTOWEGO

Autor artykułu przedstawia problem migracji na terenie Słowenii. Na początku omawia przyczyny emigracji do swojego kraju, widząc w tym głównie powody ekonomiczne, gdyż Słowenia jako członek Unii Europejskiej w niedalekiej przyszłości jest źródłem nadziei dla mieszkańców ubogiej Europy południowej i południowo-wschodniej. Równocześnie dostrzega zagrożenia, jakie równoległe powstają zarówno dla losów jednostkowych jak i ogółu społeczeństwa.

Kolejny rozdział przedstawia rys historyczny Słowenii: od narodu emigrantów do kraju imigrantów, wyjaśniając przyczyny zmienności zjawisk migracyjnych na przestrzeni dwóch ostatnich stuleci.

Część trzecia jest poświęcona samemu zjawisku, jak również wielkości i strukturze migracji za pracą do Słowenii i tranzytem przez nią. Omawia czynniki wymuszające migrację z miejsc zamieszkania, jak i przyciągające do tego właśnie kraju. Zajmuje się zarówno pracownikami legalnymi jak i nielegalnymi. Omawiając wielkość migracji przytacza wyniki spisów powszechnych i dane Urzędu Statystycznego. Prezentując strukturę zajmuje się pochodzeniem, relacjami demograficznymi i wykształceniem migrantów.

W zakończeniu przedstawia swoje wnioski odnośnie wpływu migrantów na społeczeństwo Słowenii, a także prognozy na przyszłość.

ALEXANDER DUBČEK A EURÓPSKA ÚNIA

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Ekonomická integrácia Európy sa v druhej polovici 20. storočia stala fenoménom, ktorý ovplyvňuje hospodársky, sociálny, politický a kultúrny vývoj jednotlivých jej krajín. Západná Európa vytvára už v 50-ich rokoch Európske spoločenstvá. "Schumanov plán" vytvoriť "organizovanú a vitálnu Európu" sa stáva realitou uzavretím zakladajúcej zmluvy Európskeho spoločenstva pre uhlie a oceľ šiestimi štátmi západnej Európy 18. apríla 1952 v Paríži (Parížska zmluva) a jej vstupom do platnosti 23. júla 1952. Tie isté štáty (Belgicko, Nemecko, Francúzsko, Taliansko, Luxembursko a Holandsko) vytvorili Rímskymi zmluvami z 25. marca 1957 Európske hospodárske spoločenstvo (EHS) a Európske spoločenstvo pre atómovú energiu.¹ Tieto spoločnosti fungovali na báze prirodzených trhových vzťahoch a princípoch pluralitnej občianskej spoločnosti.

Oproti tomu si približne v tomto čase krajiny tzv. východného bloku utvárajú Radu vzájomnej a hospodárskej pomoci (RVHP), ktorá sa pokúša na báze vylúčenia trhu a zavedenia direktívneho riadenia zoštátnenej ekonomiky o formy spolupráce, ktoré mali preukázať prednosti nového spoločenského systému, sovietskeho modelu socializmu. Taký bol makro-štrukturálny rámec a jeho súradnice v čase, keď do verejného života vstupoval A. Dubček.

Slovenská moderná politika sa od svojho vzniku stretáva z dilemou ako vzhľadom na (ne) veľkosť krajiny a obyvateľstva a geografického polohy zaistiť bezpečnosť a prosperitu krajiny. Často sme sa rozhodovali, pokiaľ sme svoju voľbu mohli prejaviť, len v tieni mocných. Tak tomu bolo aj v povojnovom období, keď sme sa stali súčasťou sféry vplyvu vtedajšieho ZSSR.

Keď mladý Alexander Dubček začínal v roku 1949 v politike ako profesionál na regionálnej okresnej úrovni, medzinárodné koordináty postavenia krajiny boli teda jasne vymedzené a orientované jednoznačne na východ a to podľa známeho sloganu tých čias:

¹ Borhardt, K. D.: *ABC komunitárneho práva*, Európska komisia, Bratislava 1999

"So Sovietskym zväzom na večné časy". V spoločnosti doznieval Mníchov 1938 a výrazná úloha Sovietov pri porážke fašizmu v roku 1945. Komunistická strana Československa bola na sovietske Rusko a ZSSR orientovaná už od svojho vzniku v roku 1921. Stranícka a štátna orientácia definitívne splynuli po februári 1948, keď KSCĽ uchočila plnú moc v štáte. Hoci v tomto kontexte pôsobil v prvých rokoch aj A. Dubček, skúsenosti a najmä otázky, ktoré si priniesol z pobytu v ZSSR počal kultu osobnosti a rodinné poznatky z pobytu v USA vplývali na jeho reálny pohľad na skutočnosť a širšie relevantné okolie. Ako postupoval v hierarchii straníckych funkcionárov na vyššie posty, uvedomoval si dôsledky medzinárodnej izolácie a zaostávanie krajiny za rozvojom ekonomiky vo svete. Práve ekonomické zaostávanie krajiny a v dôsledku toho problémy s realizáciou proklamovanej vízie sociálne spravodlivej spoločnosti s vyššou kvalitou života, boli prvých východiskovým momentom budúceho zásadného obratu v politickom myslení a programe Alexandra Dubčeka v prospech pro - európskej orientácie.

Prvé zárodoky nového pohľadu na medzinárodné relevantné okolie nachádzame už počas jeho pôsobenia v najvyššej straníckej funkcii na Slovensku v rokoch 1963 - 1967. Podľa A. Dubčeka bolo žiadúce reagovať na začínajúcu vedecko-technickú revolúciu. Niektoré poučky strácajú v nových podmienkach svoju platnosť a: "Hlavné problémy nám už nemôžu vyvolávať a organizovať ani emigranti ani imperialistickí agenti."² Tieto na svoju dobu novátorské a odvážne konštatovania sa vo verejnosti stretávali s porozumením, ale v istých straníckych kruhoch ako doma tak aj na východ od nás s nepriazňou.

Počas obrodného procesu na jar 1968, ktorý je vo svete známy ako Pražská jar (35. výročie si pripomíname práve v tomto období) v rámci uceleného programu demokratických reforiem, medzinárodné vzťahy a najmä vzťah k Európe vníma Alexander Dubček ako ich organickú súčasť. Proklamuje právo každej krajiny vychádzať z vlastných podmienok, hľadať formy a prostriedky, ktoré jej vyhovujú. Požadoval sa väčší priestor pre spoluprácu s ekonomicky vyspelými krajinami Európy, najmä so západným Nemeckom.

V r. 1990 pri prebraní ceny Andreja Sacharova v Štrasburgu, ktorú mu udelil Európsky parlament na margo antitotalitného obrodného procesu v roku 1968 konštatoval: "Nie je náhodou, že toto hnutie vyrástlo v Československu. Naša krajina patrila v dobe medzi vojnami k vyspelým európskym krajinám - hospodársky, kultúrne aj spoločensky. Československý reformný proces by sa nepochybné ďalej rozvíjal do demokratického systému. Brežnevova

² Laluha, I.: *Alexander Dubček, politik a jeho doba*. Bratislava, Nová Práca, 2000, s. 35 - 37

neostalinská garnitúra považovala československý vývoj za neprijateľný a preto ho vojenským násilím zastavila."³

Potreba orientácie na západné krajiny a hospodársku spoluprácu s nimi, už v roku 1968, v tejto prvej fáze pokusu o obnovu bývalých kontaktov s Európou vyvstáva objektívne pred krajinou priamo ako civilizačná nutnosť, ako potreba pre úspešný rozvoj krajiny. Alexander Dubček je iniciátor zárodkov novej koncepcie vzťahov k Európe v 60 rokoch minulého storočia, v rámci reformného prúdu vo vedení vládnucej KSČ.

Zásadne novú zahraničnú orientáciu osobnú, politickú, národnú i štátnu, vyvodil Dubček z okupácie Česko-Slovenska a násilného zastavenia demokratických reforiem v roku 1968.

Okupácia krajiny a následné dvadsaťročné obdobie, tzv. normalizácia, zabrzdiло na dlhý čas praktické kroky v uvedenom smere. Nová európska orientácia krajiny sa dostáva do politickej agendy A. Dubčeka, aj keď len v podobe úvah a ako súčasť protestných dopisov a prejavov vzhľadom k jeho postaveniu "občana druhej kategórie". V známom dopise Federálnemu zhromaždeniu ČSSR a SNR z 28. 10. 1974 kde protestuje proti útlaku zo strany ŠTB a porušovaniu ľudských práv, vyjadruje podporu zahraničnej politiky W. Brandta. V rozhovore pre talianske noviny L'Unita z roku 1987 použil snád' prvý krát formuláciu "budovanie európskeho domu".

"Z dejín roku 1968 v ČSSR, ako som sa ich snažil ukázať vyplýva, že súčasná náprava deformácií by bola významným prínosom pre budovanie európskeho domu".⁴

Pojem európsky dom proklamoval a rozviedol v známom prejave pri udeľovaní čestného doktorátu Bolonskej univerzity v novembri 1988; upresnil jeho chápanie ako: "aj nášho "spoločného európskeho domu" s vysokou kultúrou, umením, vedou a vôbec celou svojou civilizovanosťou".⁵

Od všestrannej hospodárskej spolupráce prechádza k myšlienke úzkej spolupatričnosti, chápe Európu s jej dejinami a hodnotami ako základ spoločného európskeho domu aj pre krajiny, ktoré roky či desaťročia boli umelo mimo. Do budúcnosti začleňuje do vízie spoločného európskeho domu aj jeho blízke a dobré vzťahy s demokratickým Ruskom.

Už onedlho po novembri 1989 sa mu naskytla možnosť, aby tieto úvahy proklamoval aj na fóre snád' najpovolanejšom, v európskom parlamente. Pri preberaní ceny A. Sacharova v Štrasburgu nabádal prepracovať sa k riešeniu, ktoré by začalo úspešnú etapu, ktorá by v histórii na ťažko skúšanom kontinente predstavovala kvalitatívne novú epochu európskej civilizácie. A dôvod: Súčasné

³ Dubček A.: *Od totality k demokracii*. Prejavy, články a rozhovory, Výber 1963 - 1992, s. 458, Veda, Bratislava 2002

⁴ Dubček, A.: *Listy*, časopis Československé socialistické opozície, Rím, leden 1988

⁵ Dubček, A.: *Od totality k demokracii*. Prejavy, články a rozhovory, Výber 1963 - 1992, s. 282, Veda, Bratislava 2002

premeny vytvárajú možnosť syntézy záujmov všetkých zainteresovaných európskych krajín a československá politika by k tomu prospela vlastnými iniciatívami. "Nadovšetko tiež preukázali (súčasné premeny, pozn. I. L.), že Európa je živý organizmus, vnútorne spätý spoločnými dejinami a osudmi národov i nádejami nových generácií žiť slobodne a lepšie".⁶

"Hľadáme cesty a konajme všetko pre to, čo európske národy spája na ceste ku predu, a nie to, čo ich doposiaľ rozdeľuje. Je namieste spoločná snaha o hľadanie optimálnych riešení, ktoré môžu položiť spoľahlivé základy európskej budúcnosti."⁷

Zrýchlený tep spoločenského vývoja na prelome 20. a 21. storočia vďaka rozpadu totality v novembri 1989 aktualizoval základné smerovanie krajiny a súčasne v tomto období aj krajín strednej a východnej Európy, pôvodne tzv. socialistického tábora a hľadanie nových trajektórií. Socialistická sústava i RVHP sa rozpadli. Vyspelé európske krajiny medzitým zdokonalili utváranie nových hospodárskych, politických a bezpečnostných štruktúr. Tak sa zreáľňuje Dubčekov spoločný európsky dom a vyvstáva ako praktická otázka. Ponúkala sa teda možnosť pripojiť sa k Európskemu spoločenstvu národov a krajín, ktoré už dlhobojšie zdokonaľujú nové kooperačné zväzky a štrukturálne útvary vo vzájomných vzťahoch.⁸

Po zvolení za predsedu Federálneho zhromaždenia, sa A. Dubčekovi až do predčasnej smrti po tragickej dosiaľ neuspokojivo vyšetrenej autohavárii, otvára priestor, aby projekt európskeho spoločného domu naplnil konkrétnymi krokmi. Jeho aktivity v rokoch 1990 - 1992 boli intenzívne, rôznorodé, využíval svoju autoritu a uznávanosť v Európe a vo svete na prospech Česko-Slovenska a jeho občanov. Snáď až časový odstup pomôže doceniť tieto skutočnosti, na čo nás priatelia v Európe často upozorňujú.

V tejto súvislosti sa žiada upozorniť na málo pertraktované obdobie spoločného štátu, ČSFR (1990 - leto 1992) spojené o. i. aj s výraznou aktivitou Alexandra Dubčeka, keď dochádza k prvým praktickým (a najmä legislatívnym) krokom smerom k Európskemu spoločenstvu (resp. Európskej únii). ČSFR a v jej rámci ČR i SR sa už v tomto období priamo i "pridružene" včleňujú do základných ekonomických a politických štruktúr spoločného európskeho domu. Iniciatívu prejavovali ako vláda, tak aj parlament a prezident, t. j. existoval vš-

⁶ Dubček, A.: *Citované dielo*, s. 457

⁷ Dubček, A.: *Citované dielo*, s. 458

^x V čase pôsobenia Alexandra Dubčeka nové súručenstvo štátov funguje v rámci Európskeho spoločenstva (spoločenstiev). Po 40. rokoch 7. februára 1992 bola na báze Maastrichtskej zmluvy založená Európska únia. Zmluva vstúpila v platnosť 1.XI.1993 a sama seba priliehavo označuje ako "nový stupeň pri uskutočňovaní stále užšej únie národov Európy".⁸

⁸ Borchardt, K. D.: *Citované dielo*, s. 7

eobecný konsenz o európskom smerovaní ČSFR hneď po novembri 1989. Rôznosti sa ukázali neskoršie.

Čo sa týka Alexandra Dubčeka, tak už 9. januára 1990 oznámil listom vtedajšiemu predsedovi parlamentu A. Björckemu, že sa uchádzame o štatút Rady Európy. Prvú oficiálnu návštevu vo funkcii predsedu FZ vykonal 16. - 17. januára 1990 do Štrasburgu, sídla Európskeho parlamentu a PZ Rady Európy. Súčasne prebral cenu A. Sacharova a oficiálne sa prihlásil ako i štát, ktorý zastupoval k európskej spolupatričnosti.

V Štrasburgu absolvoval A. Dubček sériu rozhovorov s vedúcimi predstaviteľmi európskych inštitúcií (E. B. Crespo, J. Delors a ďalší). Ich výsledkom bolo, že sa rozprúdili prípravné práce k vzájomným kontaktom, výmena poznatkov, pomoci v oblasti bankovníctva, príprava legislatívnych krokov k uzatvoreniu asociačných dohôd, atď.

Európska orientácia v 90-ich rokoch (a ako sa ukázalo aj v rokoch neskorších) vyžadovala nielen politickú deklaráciu, prejavenie politickej vôle, stanoviská, orientácie, vrátane uznesení ústavných inštitúcií, ale aj vytváranie konkrétnych ekonomických, legislatívnych a politicko-spoločenských predpokladov a ich rozvoja. To už nebola ako v období pred II. svetovou vojnou len klasická obchodná či politická spolupráca so štátmi západnej Európy, ale uchádzanie sa o členstvo, spoluprácu a pôsobenie v štruktúrach, ktoré si európske krajiny medzičasom vytvorili.

Na jeseň 1990 bola zriadená komisia vlád ČSFR, ČR a SR pre spoluprácu s Európskym spoločenstvom. Jej prostredníctvom sa aj zástupcovia ústredných národných ekonomických rezortov zúčastňovali na predvstupových rokovaníach. Utvorila sa stála čs. misia pri ES v Bruseli, atď.⁹

Vo federálnych zložkách sa rozprúdila intenzívna činnosť zameraná na prípravu predvstupových podmienok. U mnohých ("eurorokovia") vznikali prehnané očakávania. Čoskoro sa ukázalo, že pôjde o vecne i časovo náročné aktivity, že politické deklarácie a vyjadrenie vôle je len úvod.

O niečo neskoršie A. Dubček v rozhovore pre časopis *Smena* upozornil: "Mnohí majú predstavu, že sa tam bude vstupovať. To je veľký omyl. Do EÚ sa budú krajiny prijímať. Na to musíme splniť dva predpoklady: dosiahnuť istú politickú stabilitu a určitý stupeň hospodárskeho vývoja. Naša ekonomika musí byť ak už nie konkurencie schopná, tak aspoň kompatibilná s ostatnými".¹⁰

⁹ V rámci vlád ČR a SR sa zriadovali národné komisie, ich štruktúra bola zrkadlovým odrazom ústrednej. Predsedom Komisie vlády ČSFR bol podpredseda vlády V. Valeš, podpredsedom delegovaný zástupca FZ ČSFR I. Laluha. Komisia mala svoj aparát, prácu komisie riadil zmocnenec vlády. Komisia najmä v prvom období viedla intenzívne rokovanie v Bruseli a v priamom kontakte s aparátom Komisie ES pripravovala podklady napr. k Dohode o pridružení, atď. (Osobný archív autora).

¹⁰ Dubček, A.: *Citované dielo*, s. 446

Napriek vnútropolitickému napätiu, prístupová aktivita priniesla rad pozitív, ktoré umožnili novým štátnym útvarom, ČR i SR pokračovať v započatej činnosti. Tak napríklad rozhovory a rokovania o pridružení ČSFR k Európskym spoločenstvám začali už v máji 1990. Dohodu o pridružení k Európskym spoločenstvám podpísali už 16. decembra 1991 v Bruseli predstavitelia Poľska, Maďarska a Česko-Slovenska.^x

Po rozdelení ČSFR a vzniku ČR a SR, vláda SR po adekvátnom legislatívnom postupe 17. augusta 1993 schválila Európsku dohodu o pridružení SR k Európskemu spoločenstvu a predseda vlády SR V. Mečiar ju v Luxembursku podpísal 4. októbra 1993.

Už 21. februára 1991 bola ČSFR ako jeden z prvých štátov strednej a východnej Európy prijatá za riadneho a plnoprávneho člena Rady Európy.

Intenzívna "prístupová" aktivita orgánov ČSFR prebiehala v rokoch 1990 - leto 1992. Neúspech rokovaní o udržaní a reorganizácii spoločného štátu vytváral novú situáciu, ale aj tak hlavná činnosť, utváranie kompatibilných, politických, ekonomických a legislatívnych daností ešte čakala a obsiahla cca 10 ročné obdobie. A to nielen u nás, po rozdelení ČSFR.

Obdobie 1990 - leto 1992 je o to zložitejšie a závažnejšie, že súčasne s včleňovaním ČSFR do európskych štruktúr v kontexte prechodu k trhovej ekonomike a pluralitnej občianskej spoločnosti prebieha aj proces úpravy vzťahov, či presnejšie snaha zachovať spoločný štát Čechov a Slovákov, uspoobením vzťahov medzi ČR a SR vnútri federácie. Riešenie sa nenašlo, ktoré by uspokojilo obidve strany a došlo k rozdeleniu spoločného štátu; vyčlenili sa z neho samostatné, suverénne štátne subjekty, ČR a SR, s plnoprávnym postavením v medzinárodných súvislostiach.

Pokus o úpravu štátoprávnych vzťahov Čechov a Slovákov mal d'aleko širší ohlas vo verejnom živote, tvárnil politickú scénu v Čechách i na Slovensku, zatiaľ čo proces približovania sa krajiny k európskym štruktúram prebiehal akoby skoro nepozorovane, tichšie ale s oveľa väčšími vplyvmi na ekonomický, sociálny a politický život obyvateľstva Čiech i Slovenska a ich novovznikajúcich štátnych útvarov, než ako jeho protagonisti a verejnosť pôvodne predpokladali. Stali sa existenčnou a civilizačnou nevyhnutnosťou krajín strednej Európy. A od miery ich aktivity aj efektívnosti v "spoločnom európskom dome" závisí (výrazne) aj ich postavenie a perspektívy ďalšieho ich vývoja.

Procesy včleňovania do spoločného európskeho domu a procesy vyčleňovania ČR i SR ako suverénnych samostatných subjektov zo zanikajúcej ČSFR sa v tom čase (ale i dnes) vnímali (a vnímajú) ako protirečiace, prot-

^x Za poľskú vládu jej predseda L. Balcerowicz, za maďarskú J. Antall, za česko-slovenskú M. Čalfa, spolu s nimi predseda komisie ES J. Delors a predseda rady ministrov ES Hans van den Broeck.¹¹

¹¹ Národná obroda, č. 295 z 17. decembra 1991

ichodné a vo svojom vzájomnom pôsobení kontraproduktívne. Ale pritom išlo o dôsledok konkrétne - historického vývoja slovenskej spoločnosti. Cesty národnej emancipácie slovenského národa a vznik jeho štátnosti boli kľukaté a pod tlakom vonkajších faktorov, či nezávislých premenných. A to nielen veľmocenského charakteru (ale aj iné, napr. Vzťahy s Maďarskom a Českom). Tendencia k samostatnej štátnosti sa u nás dostáva do záverečnej realizačnej fázy historicky oneskorene, keď už začínajú integračné procesy ako výraz novej vývojovej etapy. Zladenie národno-emancipačnej a integračnej tendencie sa stalo a je kľúčovým momentom modernej histórie Slovenska a kameňom úrazu mnohých politických zoskupení a politikov.

Ak Alexander Dubček bol protagonistom orientácie a vstupu do EÚ, pri úprave štátoprávnych vzťahov Čechov i Slovákov uprednostňoval zachovanie spoločného štátu, federácie, ale pri dôslednom zachovaní princípov demokracie, rovnosti a utvárania ústredných orgánov na základe delegovania právomoci zdola od národných republík. Teda nie onen smutne známy princíp demokratického centralizmu. Takýto spoločný štát pokladal za vhodný priestor k príprave obidvoch národov k vstupu do európskych štruktúr.

Avšak práve princípy, na ktorých mal spoločný štát stáť, sa stali nepríechodnými. Vládne garnitúry sa na nich nedokázali dohodnúť, a vývoj sa uberal definitívne smerom k vlastnej štátnosti.¹²

Alexander Dubček bol vlastenec a národne cítiaci. Okrem občianskych postojov (napr. účasť v Slovenskom národnom povstaní) to preukázal aj (a najmä) ako politik v spore s A. Novotným (prvý tajomník ÚV KSČ v 60-ich rokoch) o rozšírenie kompetencií slovenských národných orgánov, prejavmi a pôsobením v rokoch 1964 - 1967, ktorými prispel k renesancii slovenského národného povedomia, za jeho vedenia v roku 1968 sa konečne presadila federácia.

Keď sa demokratické princípy rovného s rovným do federatívnej prestavy v rokoch 1990 - 1992 nepodarilo presadiť a vývoj jednoznačne sa uberal smerom k samostatnej štátnosti, Alexander Dubček v rozhovore pre denník *Smena* 3. júna 1992 konštatoval: "Kľúč na riešenie čs. vzájomnosti a spoločnej štátnosti je v obidvoch rukách a ukázalo sa, že v rozhodujúcej miere bol na českej strane, ktorá mala vyjsť v ústrety, keď inak nie, tak aspoň svojim koalíčnym partnerom."... "Časť českej politickej reprezentácie nevyšla dost' v ústrety oprávneným požiadavkám, ktoré riešia otázku národnej identity, hospodárskeho postavenia, samosprávy Slovenska ale tým aj Českej republiky".¹³

V ďalšom období bol pripravený akceptovať novú realitu, menila sa len forma, nemenil sa obsah, rozvoj a prosperita krajiny a jej smerovanie do EÚ na

¹² Bližšie pozri: Chovanec, J.: *Slovenská republika - budovanie suverénneho štátu*. Procom, Bratislava 2002

¹³ Dubček, A.: *Citované dielo*, s. 445

princípoch demokracie, sociálnej spravodlivosti a humanity, o ktoré vo svojej verejnej činnosti usiloval. Tragická autohavária tomu zabránila.

Orientácia na samostatné demokratické Slovensko a vznik novej štátnosti, ku ktorej vývoj od leta 1992 jednoznačne smeroval, neznamenali prerušenie úsilia a orientáciu na EÚ a včleňovanie do európskych štruktúr, ktoré ako sme už skôr uviedli prebiehalo v rámci ČSFR (a ČR a SR ako jej súčasť) a vykazovalo evidentné pozitívne úspechy.

Pri rozdeľovaní spoločného štátu bol vytvorený a akceptovaný stav, že obidva vznikajúce štátne útvary, ČR i SR sa stali v procese približovania a včleňovania ČSFR do EÚ jej nástupníckymi štátmi a preberali na seba príslušné záväzky a plnenie prijatých dokumentov.

Právna i historicko-politologická analýza vzniku SR sa (pochopiteľne) sústreďuje na samotný proces vzniku. Naše členstvo v únii i objektivizácia nedávnych procesov budú vyžadovať venovať určitú pozornosť aj druhej stránke procesu vyčleňovania SR z ČSFR a jej konštituovania ako suverénneho štátneho útvaru, a to venovať pozornosť aj procesu súběžného, i keď v prvom období menej dominantného smerovania a prípravy začleňovania SR do európskych štruktúr. Ide o zviditeľnenie kontinuity uvedených procesov, čo má aj svoje relevantné spoločensko-politické súvislosti. Integračné väzby SR nevyrástli na zelenej lúke.

Len ilustratívne uvedieme, že príslušné legislatívne akty FZ ČSFR a SNR (NR - SR) na jeseň 1992 potvrdzujú naše konštatovanie o určitej kontinuite v národne - emancipačných a integračných súvislostiach.

Tak napríklad Národná rada Slovenskej republiky na zasadnutí 3. decembra 1992 prijala dva dokumenty a to "Vyhlásenie Národnej rady Slovenskej republiky k parlamentom a národom sveta" a "Vyhlásenie Národnej rady Slovenskej republiky o členstve Slovenskej republiky v Rade Európy a prevzatí záväzkov z medzinárodných zmlúv".

V prvom dokumente NR SR konštatuje, že "Slovenská republika bude vytvárať politické, ekonomické, zmluvné a legislatívne podmienky na postupné zapojovanie sa a budúce členstvo v hlavných európskych hospodárskych, politických a obranných organizáciách. Potvrdzuje záväzky dohodnuté Českou a Slovenskou Federatívnou Republikou v Európskej dohode o pridružení a má záujem na jej rýchlom prevedení na Slovenskú republiku".¹⁴

V druhom dokumente konštatujú, že ČSFR bola dňa 21. februára 1991 prijatá za plnoprávneho člena Rady Európy proklamuje: "Národná rada Slovenskej republiky preto považuje za účelné už teraz vyhlásiť, že Slovenská republika ako jeden z dvoch nástupníckych štátov Českej a Slovenskej Federatívnej

¹⁴ Hlavová, V. - Žatkuliak, J.: *Novembrová revolúcia a česko-slovenský rozchod*. Prameň k dejinám Slovenska a Slovákov XIV. Literárne informačné centrum, Bratislava 2002, s. 285

Republiky si praje byť riadnym členom Rady Európy. Slovenská republika plne rešpektuje princípy pluralitnej demokracie, právneho štátu, ľudských práv, sociálnych práv a práv národnostných menšín a etnických skupín; rozhodne odsudzuje akékoľvek prejavy rasovej a náboženskej neznášanlivosti.

Vyjadruje pripravenosť plniť záväzky, ktoré vyplývajú zo štatútu Rady Európy a prispievať k naplneniu cieľov Rady Európy.¹⁵

Ďalších desať rokov prinieslo mnohé nové problémy, po rozdelení spoločného štátu určitú zmenu prístupových rokovaní a procedúr. Ale aj mnohé nové problémy v samotnej EÚ, proces integrácie sa prehĺbil a utvorili sa nové skutočnosti.

Na otázku, či proces rozdelenia nepribrzdil tempo pričlenenia sa dá odpovedať aj konštatovaním, že SR bude prijímané do EÚ spolu s ďalšími štátmi geopriestoru strednej Európy.

Jedno je evidentné, že citované už upozornenie A. Dubčeka z roku 1992, že do európskych štruktúr nebudeme len jednoducho vstupovať, ale nás tam budú prijímať po splnení predpokladov istej politickej stability a určitého stupňa hospodárskeho vývoja a aspoň kompatibility našej ekonomiky s ekonomikou krajín EÚ sa ukázalo ako veľmi opodstatnené.

Proces utvárania žiadúcich predpokladov (a dodajme, že na oboch stranách) si vyžiadal isté časové obdobie, dlhšie ako sa vo všeobecnosti očakávalo.

Každá krajina, každý národ má svoje historické osobnosti, alebo výrazné osobnosti, ktoré požívajú autoritu a vážnosť. Sú to osobnosti, ktoré sa osvedčili v zlomových chvíľach dejín, udalostí a podali svedectvo o svojom charaktere a zmysľaní. Verejná mienka vie citlivo zväžiť, ktoré hodnoty v činnosti politikov sú osobno-konjunkturalistické, egoistické a zištné a ktoré vychádzajú zo záujmov a potrieb občana a štátu. Keď sa uskutočňujú reprezentatívne prieskumy o najpopulárnejších a najváženejších osobnostiach v našich moderných dejinách, sú to predovšetkým Alexander Dubček, Ľudovít Štúr a Milan Rastislav Štefánik.

Zhodou historických okolností, ktoré o. i. svedčia o význame vonkajšieho faktora v našich dejinách, všetci traja prezentovali markantne vo svojich postojoch okrem vlastenectva a lásky k vlastnému národu aj svoje, na ich dobu moderné európanstvo, založené na humanizme, demokracii a spolupráci národov Európy. Aj plejáda ďalších významných osobností, ktoré sa priamo profesionálne etablovali v sfére zahraničnej politiky ako M. Hodža, Š. Osuský, i V. Clementis patrili k politikom orientovaným na európsku spoluprácu a spolu-

¹⁵ Hlavová, V. - Žatkuliak, J.: *Citované dielo*, s. 288 - 289 Oba návrhy, ktoré predniesol v NR - SR predseda jej zahraničného výboru I. Laluha boli prijaté absolútnou väčšinou hlasov. V tejto fáze prístupové kroky do EÚ a RE sa odohrávali ešte na báze "nepísaného konsenzu".

patričnosť našej krajiny. Niektorí z nich, ako V. Clementis v čase kultu osobnosti a represálií v 50-ich rokoch doplatili na tieto svoje názory aj životom.

Ucelený pohľad, koncepciu na povojnové usporiadanie prezentoval pred i počas II. svetovej vojny M. Hodža v 30 rokoch minulého storočia predseda vlády ČSR. Jeho projekt stredoeurópskej federácie vyvolal odozvu aj v susedných štátoch (napr. Poľsko).¹⁶

Alexander Dubček ako sme už uviedli, pôsobil v druhej polovici 20. storočia, keď sa striedali fázy studenej vojny, pokusov o reformy v r. 1964 - 1968^{xx}, v čase nového nástupu neokonzervatívcov Brežnevovského typu, ale i v čase oneskorenej "perestrojky" M. S. Gorbačova. Pôsobil v období triedne rozdeleného sveta a rozdelenia Európy na sféry vplyvu až do r. 1989.

Európska orientácia Alexandra Dubčeka sa utvárala postupne, v kontexte často i trpkých životných skúseností jeho i časti povojnovej generácie. Každý politik je pri vstupe do verejnej činnosti ovplyvňovaný i limitovaný prostredím, ktoré tam nachádza. Záleží na ňom do akej miery sa s ním stotožní, podľahne mu, resp. sa usiluje o jeho zdokonalenie alebo zmenu. Alexander Dubček vo svojej dobe patril k prvým architektom orientácie, ako on hovorieval, na "spoločný európsky dom". Cesta k nemu bola postupná, kľukatá, prekonávajúca dogmatické stereotypy, v ktorých sa Dubček pohyboval, je to v podstate tiež proces sebauvedomovania a kritickej sebareflexie, ale v neposlednom rade i možnosti, ktoré medzinárodné okolnosti dovoľujú.

Vzťah Alexandra Dubčeka k Európe to nie je len jeho osobný problém. Dubček a Európa, to je problém širšieho vzťahového kontextu, ktorý by sme mohli definovať ako problém: Slovensko a Európa na prelome storočí, a A. Dubček k tomuto fenoménu pristupoval s veľkou osobnou zodpovednosťou. Jeho európanstvo je viacvrstevné.

Predovšetkým neznamená stratu národnej identity, ale hľadanie efektívneho prostredia pre jej rozvoj a sebarealizáciu s využitím moderných civilizačných foriem a trendov. Žiť v Európe a k tomu ešte v jej strede a byť od nej nezávislý, alebo dokonca izolovaný, je len novou utópiou.

K pochopeniu potreby orientácie na "Európsky spoločný dom" privedlo A. Dubčeka poznanie, že optimálnou formou rozvoja spoločnosti je demokracia. Aj v tom, alebo predovšetkým v tom, spočívajú korene praktického Dubčekovho európanstva. Preto sa búri proti totalite a jej praktikám a prekonáva svoju

¹⁶ Bližšie pozri: Pekník, M. a kol.: *Milan Hodža, štátnik a politik*, Veda, Bratislava 2002. Ak A. Dubček uvažoval o Spoločnom európskom dome a M. Hodža pred ukončením II. svetovej vojny o stredoeurópskej federácii, M. R. Štefánik na sklonku a po I. svetovej vojne uvažoval o Spojených štátoch európskych. Východisko, ale i útočisko (ochrana), sa hľadala vo väčších spoločenských.

^x Rok 1968 mal v Európe veľký ohlas. Tak napríklad v Poľsku počas nepokojov v marci, študenti niesli transparent s heslom: Cała Polska czeka na swego Dubčeka.

(a našej generácie) pôvodnú víziu novej spoločnosti v tej podobe, ako sa realizovala.

Chápal Európu ako súručenstvo rovnocenných národov a štátov, ktoré sa rozvíjajú v demokratických podmienkach.

Tu niekde v myšlienke rovnoprávnosti a demokracie vidí aj priestor pre sociálnu spravodlivosť, ktorá ho pôvodne (tak ako aj jeho rodičov) motivovala, že sa z neho stal "homo politicus".

Európska orientácia A. Dubčeka má rozmer zodpovednosti politika a štátnika za osud a perspektívu svojho spoločenstva. Za vytvorenie podmienok pre pokoj medzi národmi a štátmi, Európa si už svoje vytrpela. A aj preto chápe Európu celostne, vrátane demokratických režimov východných krajín. Nepodceňuje dobré vzťahy s Ruskom a hospodársku spoluprácu, ale ťažisko sa presúva do európskych a transatlantických bezpečnostných štruktúr, od ktorých by demokratické Rusko nemalo byť izolované.

Alexander Dubček pridal k svojmu všeobecnému európskemu rozmeru aj osobnostný politický rozmer. Vrátil sa k pôvodnej politickej príslušnosti svojich predkov, vstúpil do sociálnej demokracie, ktorej koflískou je Európa.

"Dnešná integrujúca sa Západná Európa a krajiny v nej predstavujú niečo iné, nové, ako to, čo charakterizovalo kapitalizmus pred prvou svetovou vojnou aj medzi dvoma vojnami. Zrodila sa nová pluralitná demokracia s rozvinutým trhovým hospodárstvom a sociálnymi istotami.

Rodí sa nová integrujúca Európa. My dnes spejeme k nej. Usilujeme o členstvo v tomto skutočne novom spoločenstve. To hovorím, často a vedome. Vidím hlboké zmeny vo vývoji Európy za uplynulé polstoročie. Pôvodný kapitalizmus zostal v minulosti aj s jeho militantnou, antihumánnou, fašistickou etapou, ktorou prešiel.

Poznámka záverom:

Som stúpencom trhovej ekonomiky, ktorá je hybnou silou nášho ekonomického a sociálneho rozvoja. "Je to však iba prostriedok - nie cieľ". Som stúpencom demokracie." uviedol Alexander Dubček v odpovedi na interpretáciu poslanca F. M. vo Federálnom zhromaždení v roku 1991.¹⁷

Tento, aj keď pomerne dlhý citát markantne ukazuje z akých hlbinných sociálno-ekonomických presunov, ktoré v Európe v druhej polovici 20. storočia prebehli subsumoval Alexander Dubček svoje zásadné životné postoje. Boli zbavené konjunkturalizmu a chvíľkových emócií, opierali sa o racionálne poznávanie vývojových trendov. Ale aj o vysokú náročnosť očakávaní, ktoré osvojenie si integračných trendov má znamenať, priniesť. Chápal ich však ako výsledok aj vlastného pričinenia a spolusúčinnosti. "Zmyslom je, aby sa naša

¹⁷ Luluha, I.: Citované dielo, s. 122 - 123

republika otvorila svetu a stala sa aktívnym činiteľom európskeho spoločenstva!¹⁸

Životné skúsenosti a štátnická zodpovednosť zaradila A. Dubčeka medzi tých politikov Slovenska, v jeho moderných dejinách, ktorí na sklonku XX. storočia sformovali predstavu o našom globálnom smerovaní a presadili integračnú európsku koncepciu nášho rozvoja. U Alexandra Dubčeka je to o to cennejšie, že zlomové dejinné situácie a jeho pozícia v nich, vrátane schopnosti kritickej reflexie vlastných postojov mu vystavili "certifikát dôvery" vysokej kvality. Dubčekovo európanstvo je pozitívnym prekonaním totality.

Summary

ALEXANDER DUBČEK AND THE EUROPEAN UNION

The economic backwardness of the country compared to Western Europe in the 60^s of the 20th century roused in A. D. considerations about the need to overcome the isolation and to start economic cooperation.

After the suppression of the reforms in 1968 the economic orientation of Dubček strengthens, he intensifies the theme of the „common European house“ where he puts also the countries of Central Europe.

After the fall of the totalitarian regime and the return into public life as the chairman of the Cheko-slovak parliament (FZ ČSFR) he endeavours in the years 1990 – summer 1992 (till his tragic car accident) so realise the acceptance of the country into the European Union and the Council of Europe. The broad diplomatic activity of A.D. And his international prestige help to open the door to Europe.

The european image of Dubček is an active way to overcome the totalitarian regime and is an expression of the vision of new Europe on the basis of democracy, social justice and equality of nations.

The first steps of the arising Slovak statehood (autumm 1992) were connected to his initiatives and proclaimed the interest of the Slovak Republic in the European structures and a participation in them.

¹⁸ Dubček, A.: Citované dielo, s. 338

PROTESTANT WORK ETHOS IN THE EUROPEAN CULTURE CIRCLE

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Foreword

The work is one of the most important problems of the human life. It is a phenomenon, which is frequently described in the literature. It is the object of interest and research of different sciences which, complementing each other, give us the knowledge being necessary to understand not only the term "work" but also the whole work process.

Already in the antiquity the question of the work awakened the interest of philosophers and thinkers. Many scientists have treated this problem in their works for many years and yet it is still present in the works of the scientists of today.

The increasing interest in the work in Poland is a result of the social and economic transformations in the world. This phenomenon has contributed to the forming of a new attitude towards the work in the Polish society what leads to the unity of the professional and private world observed in the ordinary life.

The transformations taking place in Poland in the nineties caused a strengthening of the social strains caused by the possible employment loss or missing employment first of all, because the work is an integral component of our life which full it with diverse experiences and make it more valuable. Therefore, we can say that the work makes our life meaningful and significant.

In the last years the importance of the work in our life has significantly increased and paralelly the work attitude towards the work execution has changed. Not only the attitudes of the workers but also the requirements and expectations of the employers have thoroughly changed whose main aim is to increase the efficiency of their own enterprises. Such an attitude results from the privatization of the large enterprises where the employer directly supervises the workers.

The above mentioned work organization type has been introduced in Poland on the base of the models which are functioning in the European Union, the tradition of which is however different from the Polish one. The West-

European countries are principally formed on the base of the Protestant culture, which assumes that the work is a human vocation, a part of the human nature and fulfillment of God's dictates. A theory connected with this work attitude says, that there is an exact relationship between the activity performance and the Protestantism.

The objective of this article is to investigate and define the attitudes presented by the university students towards the Protestant work ethos. A group of students in a chosen age range has been subjected to the investigation and the results have been analysed and verified on the base of the control group.

Protestant work ethos in the background of Poland's integration with the European Union

The history of opinions and conceptions during the whole mankind history is splitted by the opposite strains of right and wrong, health and pathology, pride and humiliation, spirituality and materiality. The work development does not run on a single way of successive replacement of the less perfect forms by the more perfect ones. In the psychological development of the work phenomenon two opposite traditions may be distinguished. The first one is the work and activity cult tradition and the another one is the tradition of the sense of the life without work ethos. The work ethos achieves in our European culture the fullness of its activity in the human consciousness.

The work ethos as a fullness of the formed activity was definitely established in the European culture not before the modern days. The work phenomenon came into being in the Greek culture. The antic Greeks called the present work for example "praksis" that means any activity or position of the people. The notion "pragma" - act, work, essence of the matter - logos described the things, events and also people. The human lot was defined by the Greek term - "pragmateia" - that means an occupation, profession, work or business. The man type resounded by Homer was the "praktikos" and this means an energetic and efficient person. The whole Greek tradition was totally imbued by the activity ethos and in this respect it clearly opposed the Hindu tradition¹. The European tradition, also called Western tradition has its direct source in the Greek mentality. The work phenomenon as fate of both the free people and slaves created in the antic Greece has been fixed in the European tradition and survived the Roman age.

However, the positive meaning of the work was limited with time to the artists and handicraftsmen. The general man value dimension "praktikos" was replaced by the valuation by respect and regard, based on material independen-

¹ Bańka A., *Psychopatologia pracy*, Wydawnictwo Politechnika Poznańska, Poznań 1996

ce. The contempt for the work, especially the physical one increased due to the separation of the consciousness and the reality i.e. belief in the world leading power using the idea without manual and muscular effort. In general, the work, especially the manual one, had a low prestige in the antic world. The attitude of individual people and social groups towards the work was in each historical formation under a high pressure of the social consciousness. In the II and I century B.C this phenomenon had such a form, that first the aristocracy, then the populace and, to the end, the slaves began to despise any works carried out under pressure.

In Poland S. Klonowic presented his attitude towards the work in his poem „Victoria Deorum...”, conforming his middle-class consciousness, a dominating feature of which was the work ethos, contrary to the nobility class. This middle-class man and mayor of Lublin wanted to convince the nobility class, that it would be all the better if they “busied themselves doing a conscientious work”. He distinguished good and bad works what is a classical example of the ambivalence of attitudes towards the work, which is present in form of the opposing of the Polish words “praca” and a little pejorative “robota”.

The Christian work ethos was unstable. Particularly, the work prestige was strengthened by the replacement of the cosmocentric world vision by the personalistic conception. In the same time the prejudice against the working earning people was so deep and common that they negatively influenced the whole Christianity. Also the christianization of the Polish territories brought a negative relation to the work, created in the antic culture circle.

Although, as results from the experience and tradition, we may assume that there is in principle a common form of the activity of the people and can be regarded to be a natural function of them and any hard work is a necessary element of the human existence, a liberation of the work from this dialectical contempt didn't take place for a long time. According to calculations a group amounting to approximately 6% of the population - from magnate to beggars - had not to work on the Polish territories in the XVI century.

In any times, any territories, cultures the proportions have changed and the work ethos has changed, too - in the people who must work as well as who need not to directly take part in the work process. But the essence of this double work nature has been always the same. The renaissance and reformation brought an essential newness of the work ethos in the Western culture. In that time the modern attitude towards the work as a specialized production was formed which is the source of richness for some people and of maintenance for the others. Apart from this current which may be called laic, the Protestantism strongly influenced the emancipation of the work in the European tradition. The Protestant movement initiated by Martin Luther opposed the subordination of the laic life to the supernatural one and, especially, the religious abuses. As a consequence, the Protestant ethic was formed. The separation of the natural

and supernatural sphere was here overcome by the positive work command, in accordance with the natural human status. In the Protestantism the work is a vocation, part of the human nature as well as the fulfillment of the God's orders. On the other hand, during the later development of the Protestant doctrine and especially in some puritan formulations the work becomes a part of a general trend, assuming, that the work is a way to the God. The work results are therefore not important, but the working process alone is very important.²

The work is an integral part of each human life and the experiences connected with it fill and significantly enrich our common life. The work makes the common life more interesting and easier to be sustained, particularly if it satisfy our basic human needs such as desired important interpersonal relationships, creative realization and assurance that our activities are respected and important.

However the professional work may cause serious life crisis. It accompanies us as a psychological, emotional, cognitive and decisive category in order to become an economic force category at the threshold of maturity.

Form the view-point of the whole life time of an individual, where the connection of the own "self" with the professional function are connected, three basic crisis phases may be distinguished:

The first crisis phase occurs in the life of an individual together with the maturation and overtaking of the professional functions. The transition from the childhood into the adolescence strengthens the pressures on the individual towards the conscious decision about the professional function, i.e. the whole of the doing and thinking of the man. This pressure may be external (school, parents, people of the same age) and internal, connected with the cristalization of the own internal "professional world". The first of the mentioned crises, connected with the choice and question "what shall I do next?" occurs in different ages - from several up to ca. thirty years and ends with the profession choice and overtaking of the professional function.

The second crisis phase is connected with the professional activity. This crisis manifest itself in complications resulting from the fulfillment of the professional function on the social, personal and objective levels. The change of the production techniques and technologies, especially the automatization and computerization and the necessary change of job taking place in average several times during the professional activity time, are the crisis reasons on the objective level.

The crisis in connection with the professional career break down on the social level occur if conflicts and antagonisms come into play, which result from the social nature of the work (aspirations, competition, aggressiveness). In this phase, which is the period of the maximum engagement of the individual, this individual meets many problems, which may cause either negative or posi-

² Gałkowski J.W., *Praca i człowiek*, PAX, Warszawa 1980

tive personality changes. A rational registration of the missing adjustment of the existing personality features to the requirements of the fulfilled professional function by the worker is a challenge, which the individual has to cope with. The crisis occurs when the worker begins to understand that his can not base his decisions on clear rules and criterions. At that time strain states in form of a function conflict occur which may cause many physical or psychical illnesses of different intensity and duration.³ Professional crises occurring in this period are in many times connected with the changeability of the work requirements which may occur from day to day which forces the man to adapt himself, suddenly changing its attitudes and activity schedules (so-called work loading). Such a view often causes a stress in form of fear, unpunctuality or fall to fulfil the task. Other causes of personal based professional crises are critical events, such as death of close people, marriage, imprisonment, better work proposal, termination, illness, cripplehood, birth of child. They may lead to threefold consequences: psychological distress, psychiatric distempers and various psychopathological behavior types.

The last crisis phase is connected with the leaving of the active professional field. The retirement is the most classical example of this crisis phase, resulting from the problem of the life sensibility. This inevitable moment in the professional life of each man is often treated as a break of the life continuity what leads to difficulties in finding of a new function. The health problems and problems which cause the loss of the work abilities often cause the crises of the late maturation and old age. Therefore, the crises of the third phase are a symptom of the inevitable change of the psychical category "I-work" into "I-activity".

The changes taking place in the last ten years of the XX century in the world, especially in Poland have caused a total change of the attitudes towards the work. Poland has undergone a sudden transformation, which caused great system and economic changes. These changes influenced the forming of the new work attitude in the Polish community.

The economic changes caused a worldwide reversion from the social services of the state. The previous state obligations were overtaken by the self-government units. Due to the widely understood privatization a violent rise of the number of small enterprises with more and more exact work specialization took place in Poland in the last years. In addition, not only the increasing requirements of clients but also the uninterrupted quality requirements due to the competition and also the planned EU accession of Poland influence the numerous changes of the economy.

³ Bańka A., *Psychopatologia pracy*, Wydawnictwo Politechnika Poznańska, Poznań 1996

The time of the radical political and economic transformation is for Poland a challenge putting the question if the overtaking of the West output is the sufficiently good way to solve our problems, because the unity of the professional and private world observed in the common life. Duo to the new attitude towards the occupied job the borders between the time for work, rest and education have been removed. The aim at total identification with the enterprise and raise of the individual motivation can be more and more frequently observed. The free time is often replaced by the "money" and other material goods.

In this place I would like to call your attention to the numerous differences between Poland and the West regarding the dissimilarity of cultures (traditions) and mentalities first of all. Poland as a Catholic culture country has quite different traditions than the West Europe, which has been formed mostly within the Protestant West-European culture.

According to the theory of M. Webera (1905) there is a close relation between the Protestantism and the capitalism. The better activity efficiency of the Protestant culture compared with the Catholic culture shall confirm this thesis. In 1961 McClelland introduced the above theory into the psychology and presented a socially-psychological explanation attempt. According to McClelland the ideas and values of the Protestant Work Ethos (PWE) are determinants for forming of independence and strong motivation in the children, creating clever entrepreneurs who strongly believe in their own abilities. Laying stress on the belief and individual level behavior extent McClelland defined the PWE conception as the basic personality dimension. This way he stated that attainment need, deeply rooted in the PWE, is an indicator of work (also hard work) satisfaction and belief in justice and equality.⁴

In spite of the existing, differences, resulting from the culture, a change of the work attitude has taken place in the last ten years. Surely, the using and imitation of the West tradition by the Poles have also significantly influenced the change of the life style of many Poles. Due to the new attitude towards the work a continuous additional training and improvement of the occupational qualifications is required. The phenomenon "all-life education" has been occurred.

How is the attitude of the young people toward these changes? What kind of workers will they be in future? Will they identify themselves with the ideas of the Protestant Work Ethos? I would try to answer these questions in the following part of this article.

The following main problem is putted for the needs of this article:

How are the attitudes of students towards the Protestant Work Ethos?

⁴ Furnham A., *A content, correlational, and factor analytic study of seven questionnaire measures of the protestant work ethic*, Human Relations, 1990/4

The particular investigation problems result from the so formulated problem:

1. Does the age influence the appearing of attitudes towards the work?
2. Do the religion attitudes influence the attitude towards the work?
3. Do the attitudes towards the work depend on the education level of the persons under research?
4. Does the social environment, defined by its place of residence influence the attitudes towards the work?
5. Description of the used techniques

The selection of proper methods, techniques and investigation tools is a consequence of a exact analysing of the work problem, definition of variables and their indicators. Just such a sequence is pointed out by many scientists. According to H. Muszyński⁵ „the choice of proper investigation methods must take place separately for each variable and as a result of the selection of the suitable indicator”. Z. Zaborowski⁶ points to the negative consequences of a premature investigating if the problem had been not properly analysed. In his opinion an effective scientific investigation “must organically mature, the researcher must have a relative comprehensive mental map, differentiate and properly classify the phenomena, competently translate then into the language of indicators, test the methods and the correctness of the investigation procedure”.

A diagnostic public opinion poll method has been utilized for the needs of this article, treating the attitudes of students towards the Protestant work ethos. According to A. Kamiński⁷, „a defined social phenomenon is for the diagnostic public poll the same as the lot of human units of a defined kind for individual case”. Any social phenomena, states of the social consciousness, opinions of defined communities, increasing of defined phenomena, their trends and intensity are therefore the investigation objects of a diagnostic public opinion poll.⁸ A special representative sample selected from the general population is investigated using the public opinion poll.

The diagnostic public opinion poll method using small samples is frequently used at the empirical pedagogical investigations. It makes possible to promptly and cheaply sketch the problematic of the phenomenon under the research. The value of this method increases, if the attempted registration of the

⁵ Muszyński H., *Wstęp do metodologii pedagogiki*, PWN, Warszawa 1971

⁶ Zaborowski Z., *Wstęp do metodologii badań pedagogicznych*, Ossolineum, Wrocław-Warszawa-Kraków-Gdańsk, 1973

⁷ Kamiński A., *Metoda, technika, procedura badawcza w pedagogice empirycznej*, W: R. Wroczyński, T. Pilch (red.), *Metodologia pedagogiki społecznej*, Wrocław-Warszawa-Kraków-Gdańsk, 1974

⁸ Pilch T., *Zasady badań pedagogicznych*, Wydawnictwo Żak, Warszawa 1995

development trends of the investigated phenomenon and testing of the improvements resulting from the investigations will be successful.

Review, questionnaire, personal document analysis, statistical techniques are the techniques being mostly used for a diagnostic public opinion poll.

I have used the questionnaire technique for the needs of this article. According to W. Zaczyński⁹ a questionnaire is "information achieving method where selected people are asked using a printed question list, called questionnaire sheet".

A questionnaire has been used for my investigations, focussing on the students' attitudes towards the Protestant work ethos.

On the base of the questionnaire made of A. Furnham, I have designed a questionnaire sheet consisting of 57 questions of a closed nature. 29 questions refer to the work by itself. The point out the fundamental dimensions of the Protestant work ethos: respect, admiration, hard working willingness. 13 questions have to define the attitude of the investigated people towards the free time. 9 questions refer to the morality and religious attitudes. And the last 6 questions of the questionnaire treat problem of independence and self-dependent working. Apart from the above mentioned questions the questionnaire includes also 9 questions with a registry of the independent variables which enable us to carry out a problematic identification of the unit under research.

Characteristics of the groups under research and research organization

The random sample of students, 23 up to 30 years old, studying different faculties of the following universities: University of Rzeszów and Jagellonian University of Cracov was subjected to the research. Students of IV and V study years of stationary and extra-mural university studies took part in the research.

The learners of the secondary school "Liceum Ogólnokształcące Stowarzyszenia Promocji Przedsiębiorczości" in Rzeszów were the control group. Two classes II and III - young people 16-18 years old have been selected for the investigations. In total, 80 persons were subjected to the investigations.

The basic student group was subjected to the research in February 1999. I gave them questionnaire sheets to be filled in and proper instructions. I pleased them to exactly read the questionnaire statements, assuming an attitude towards these questions and choice proper answers (YES or NO) and to bring these questionnaire sheets on the following day. I also informed the students that the research participation is not obligatory and the results shall be anonymous.

The control group research took place in January 1999. I carried it on during the school lessons having informed the learners about the research ob-

⁹ Zaczyński W., *Praca badawcza nauczyciela*, WSiP, Warszawa 1976

jective and ensuring them the anonymousness. The investigations carried out had to fulfil two basic tasks: gathering of research materials and, in addition, force the learners to a personal reflection on the subject problem.

Both groups received the same questionnaire. Both the secondary school learners and students willingly agreed to take part in the research and showed a large interest in positive attitude, making an efficient investigation easier.

I carried out the research using the questionnaire designed especially for this research. I analysed the gathered materials in the following way:

1. I estimated each of the 57 questions and with 0 or 1 point, depending on the conformity with the PWE.
2. Then I added up the questionnaire points:
 - first within the four dimensions of the attitude estimation in relation the PWE,
 - next the total points achieved by each person under the research.
3. I presented the achieved results in a defined order, having divided them into following groups:
 - a) students,
 - b) learners,
 - c) university-educated persons,
 - d) secondary-school educated persons,
 - e) persons showing a highly-intensive religious attitude,
 - f) persons showing a medium-intensive religious attitude,
 - g) persons showing a low-intensive religious attitude,
 - h) persons living in villages,
 - i) persons living in cities.
4. Then I calculated an arithmetical average form the achieved points for the groups listed above.

I verified my calculations in order to confirm (or not to confirm) the correctness of my thesis using the independence test “Chi-kwadrat”. Having the calculated χ^2 value I compared it to the critical value χ^2_{α} , from the “Chi-kwadrat” distribution tables. I defined the relation power of the investigated variables on the base of the contingency factor (C). Having the contingency factor value C and C_{\max} I calculated the corrected contingency factor value C_{kor} . I interpreted the C_{kor} using a key, which define the relation power of the investigated variables.¹⁰

¹⁰ Lewicki Cz., *Zbiór zadań ze statystyki dla pedagogów*, WSP, Rzeszów 1998

Attitudes towards the Protestant Work Ethos according to the own research

The questionnaires delivered data, which describe the attitude type representing by the people under research towards the Protestant Work Ethos. Absolute numbers representing each attitude are the basic data for the statistical calculations. I calculated their proportions multiplying the number 80 (number of persons under research) by 57 (number of questionnaire statements). This way I received a number, which represents all the questionnaire answers. From this number I calculated percentage values. This value was defined by J. Rembowski as the number of "person-opinions".

The first of my assumed hypothesis (H_1) is: "I assume, that the age is a significant factor regarding the attitudes towards the Protestant work ethos: older people present generally more better attitudes than the younger ones" In this case the zero hypothesis (H_0) assumes, that the age is not a significant factor regarding the attitudes towards the Protestant work ethos.

Assuming $\chi^2_{\alpha^2} (\alpha = 0,05, df = 2) = 5,991$, based on the values of table 1 I calculated $\chi^2 = 15,42 > \chi^2_{\alpha^2} = 5,991$. With the probability of 0,95 I can state, that there are no reasons to assume the H_0 .

Table 1. Relation between the intensity of the attitudes towards the Protestant Work Ethos and the age of the people under research

intensity of attitudes	age of people under research				in total	
	students		Learners		N	%
	N	%	N	%		
High	11	22,0	1	3,3	12	15,0
medium-high	37	74,0	19	63,3	56	70,0
Low	2	4,0	10	33,3	12	15,0
In total	50	100,0	30	100,0	80	100,0

This relation has been statistically confirmed, certifying the correctness of the H_1 assumptions. On this base I assume, that the older people represents generally better attitudes in this regard than the younger ones. In addition to this, the corrected contingency factor I have calculated is $C_{kor} = 0,53$ and is placed within the range of $0,5 \leq C \leq 0,7$, defining the force of the calculated relation as high, according to the interpretation table.

The another assumed hypothesis (H_2) is: "I assume, that the social environment, defined by the place of residence is a significant factor regarding the attitudes towards the Protestant work ethos: in general, the people living in a city environment have better opinions about the Protestant work ethos than the

people living in village environment. In case of this hypothesis I formulated a zero hypothesis, which is:

H₀: The social environment defined by the place of residence is not a significant factor regarding the attitudes towards the Protestant work ethos.

Table 2. Relation between the intensity of the attitudes towards the protestant work ethos and the place of residence of the people under the research

intensity of attitudes	place of residence				in total	
	city		Village			
	N	%	N	%	N	%
High	11	16,7	1	7,1	12	15,0
medium-high	44	66,6	12	85,8	56	70,0
Low	11	16,7	1	7,1	12	15,0
in total	66	100,0	14	100,0	80	100,0

Having made the calculations shown in the table 10 it became evident that $\chi^2 = 2,0$ what at $\chi_{\alpha}^2 (\alpha = 0,05, df = 2) = 5,991$ gives: $\chi^2 = 2,0 < \chi_{\alpha}^2 = 5,991$. With the probability of 0,95 I state, that there are no reasons to reject the H₀, which assumes, that the attitudes towards the Protestant work ethos do not depend on the social environment, defined by the place of residence of an individual.

The third assumed hypothesis (H₃) is: „I assume, that there is a relation between the intensity of the religious attitude and the attitude towards the Protestant work ethos: people showing a higher intensity of the religious attitude stronger identify themselves with the Protestant work ethos than the people, whose religious intensity attitudes are low”. In this case the zero hypothesis assumes, that:

H₀: The attitude towards the Protestant work ethos do not depend on the intensity of the religious attitudes.

Table.3. Relation between the intensity of the attitudes towards the protestant work ethos and the intensity of the religious attitudes of the people under the research

intensity of attitudes	intensity of religious attitudes						in total	
	high		medium-high		low			
	N	%	N	%	N	%	N	%
High	8	20,0	4	12,1	0	0,0	12	15,0
medium-high	31	77,5	19	57,6	6	85,7	56	70,0
Low	1	2,5	10	30,3	1	14,3	12	15,0
in total	40	100,0	33	100,0	7	100,0	80	100,0

Assuming $\chi_{\alpha}^2 (\alpha = 0,05, df = 4) = 9,488$, based on the data from table 3 I calculated $\chi^2 = 12,52 > \chi_{\alpha}^2 = 9,488$. With the probability of 0,95 I can state, that there are no reasons to assume the H₀ hypothesis. Thus the zero hypothesis is

rejected and the opposite hypothesis H_3 is assumed. The correlation factor is in this case $C_{kor}=0,45$. According to the interpretation table the force of the calculated relation is to be regarded as medium-strong, what is statistically significant.

The fourth hypothesis I have assumed (H_4) is: „I assume, that the education level is a significant factor regarding the attitudes towards the Protestant work ethos: in general, the people university-educated represent better attitudes in this regard than the lower educated ones.”

H_0 : The education level is no significant factor regarding the attitudes towards the Protestant work ethos.

Table 4. Relation between the intensity of the attitudes towards the protestant work ethos and the education level of the people under the research

intensity of attitudes	education level				in total	
	high		Low		N	%
	N	%	N	%		
High	11	22,0	1	3,3	12	15,0
medium-high	37	74,0	19	63,3	56	70,0
Low	2	4,0	10	33,3	12	15,0
in total	50	100,0	30	100,0	80	100,0

According to the calculations in table 12 $\chi^2 = 15,42 > \chi_{\alpha}^2 = 5,991$. With the probability 0,95 I state, that there are no reasons to accept the H_0 . Thus, I reject the assumed zero hypothesis and accept the H_4 , which assumes, that the education level is a significant factor regarding the attitude towards the Protestant work ethos. Therefore, I can also state, that the university-educated people represent a better attitude towards the Protestant work ethos, than the people representing a lower education grade do. In this case the contingency factor I have calculated is

$u C_{kor} = 0,53$ so that the force of the presented relation is high and statistically significant according to the interpretation table.

Recapitulation

Forming of a proper attitude towards the work is in principle a necessary condition for the correct functioning the people within the present society. The job choice, which decides the professional career, self-realization and social position, is a consequence of this process.

We usually choice our future job when we are 18 - 30 years old, depending on the own maturity grade. Thus a group of young people in this age range was subjected to my research because I wanted to investigate the attitudes of the young people towards the Protestant work ethos.

However, I must point out, that the youth attitude towards the PWE is a very complex phenomenon because no attitude is univocal as it consists of defined components, such as knowledge, feelings, and behaviors. Furthermore, the youth as a social group is very diversified what additionally influences the complexity of the attitudes.

On the base on the main problem I have formulated the following detailed problems:

- a. Does the age influence the attitudes towards the work?
- b. Do the religious attitudes influence the attitude towards the work?
- c. Do the attitudes towards the work depend on the education level of the people under the research?
- d. Does the social environment, defined by the place of residence, influence the attitudes towards the work?

The definition of the students' attitudes towards the Protestant work ethos assumptions was the objective of my research.

Having at my disposal numerous methods I have chosen the diagnostic public opinion poll method for my research. Within this method I have applied the questionnaire technique using a properly designed questionnaire sheet.

The selection of variables depended on the type of my investigations. Therefore, the attitudes toward the Protestant work ethos are the dependent variable and the age, place of residence, education level and religious attitudes form the group of independent variables.

The analysis of the gathered materials let me formulate the following statements which are based on the previously assumed hypothesis:

- a. There is a strong relationship between the intensity grade of the attitudes towards the PWE and the age. Older persons represent better attitudes in this scope than the younger ones.
- b. The social environment, defined by the place of residence is not a significant factor regarding the attitudes towards the Protestant work ethos.
- c. The statistically presented results have proved that there is a relationship between the religious attitude intensity and the attitude towards the PWE. Namely, people who show more intensive religious attitudes more strongly identify themselves with the Protestant work ethos compared to the people representing a low intensity of the religious attitudes.
- d. There is a strong relationship between the education level and the attitudes towards the PWE: in general, the people with university education represents here better attitudes than the people with lower education grade.

On the ground of the investigations carried out I have formulated the following conclusions of practical nature:

- a. The educator must be informed on their part in forming of the independence in the young people, what is possible by increasing of individual tasks and limitation of team tasks.

- b. The type of tasks unaided realized by the learners shall be taken into consideration.
- c. Awakening of a strong motivation for the given work in the young people seems to be advisable. For example, showing the advantage of a good realized task, which shall become more immaterial with the age.
- d. The parents play an important part in the strengthening of the intensity of the attitudes towards the Protestant work ethos. They should form the value feeling and belief in their own abilities through proper protection, upbringing and safety ensuring.
- e. Both the teachers and the parents play a very important part in the forming of the young people of performance needs. According to the assumptions of the Protestant work ethos these needs are an extremely important component enabling them to achieve success.

The presented research results prove, that the respect for the work must be awakened in the young people since the youngest age and independently from the place of residence. The respect for the work, typical for the Protestant work ethos is, connected with a proper education are one of the most essential conditions enabling the people to avail themselves of the chances brought by their professional life.

This shall be especially important in the coming time, when Poland will have to adjust its activity rules to the standards of the European Union in all spheres. This is a condition, which must be necessarily fulfilled if Poland will make use of the chances connected with the European integration.

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Streszczenie**PROTESTANCKI ETOS PRACY W KRĘGU KULTURY EUROPEJSKIEJ**

Efektom przemian społeczno-gospodarczych zachodzących na świecie jest występujący obecnie w Polsce wzrost zainteresowania problematyką pracy. Zjawisko to przyczyniło się do ukształtowania nowego stosunku do pracy wśród polskiego społeczeństwa, czego skutkiem jest powszechnie obserwowana w życiu codziennym jedność świata zawodowego i prywatnego.

Zmiany zachodzące w Polsce w latach dziewięćdziesiątych przyczyniły się do zwiększenia napięć społecznych, których podstawowym powodem stało się niebezpieczeństwo utraty pracy lub brak możliwości jej podjęcia. Dzieje się tak między innymi dlatego, iż praca stanowi integralną część naszego życia, niejednokrotnie wypełniając je najróżniejszymi doświadczeniami i czyniąc je bardziej wartościowym. Można więc powiedzieć, że praca nadaje naszemu życiu sens i znaczenie.

W ostatnich latach znaczenie pracy w życiu człowieka znacznie wzrosło, a wraz z nim zmienił się stosunek ludzi do sposobu jej wykonywania. Gruntownej zmianie uległy nie tylko postawy pracowników, ale też wymagania i oczekiwania ze strony pracodawców, których podstawowym celem stało się zwiększenie efektywności własnych przedsięwzięć. Taka postawa jest wynikiem prywatyzacji dużych zakładów pracy, a także wzrostem liczby małych przedsiębiorstw, gdzie pracodawca często sprawuje bezpośrednią kontrolę nad pracownikami.

Powyższy sposób organizacji pracy został wprowadzony w Polsce w oparciu o wzory funkcjonujące w Unii Europejskiej, która jednak posiada całkowicie odmienną od naszego kraju tradycję. Kraje Europy Zachodniej ukształtowane są głównie na kulturze protestanckiej zakładającej, że praca jest powołaniem człowieka, częścią jego natury oraz wypełnianiem nakazów bożych. Z takim podejściem do pracy związana jest teoria mówiąca, że istnieje ścisły związek pomiędzy efektywnością działań a protestantyzmem.

Celem niniejszego artykułu jest zbadanie i określenie postaw, jakie prezentują studenci szkół wyższych wobec protestanckiego etosu pracy. Badaniami ankietowymi objęto grupę studentów w wybranym przedziale wiekowym a następnie wyniki poddano analizie i weryfikacji w oparciu o grupę kontrolną.

...the history of the Polish state...

PROTESTANT WISE ETHICS IN THE HISTORY OF THE POLISH STATE

INTRODUCTION

The history of the Polish state...

EUROPEAN CHOICE OF UKRAINE: INTERNAL AND EXTERNAL CONDITIONS

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General Remarks

While speaking about European choice of Ukraine we mean its geopolitical strategy. Needless to say that historically Ukraine was not the subject, but only the object in the international arena. Everywhere it was considered the province of Russia with all the following consequences. Even after having gained its independence, Ukraine was hardly known as a state.

The year of 1991 has become crucial for Ukraine and Ukrainians. It was the year of the USSR collapse. At first sight, it seems rather strange that it was Russia, which declared its independence the first, though it was "the first among the equal" in the Soviet Union. The next was Ukraine, which declared its independence as well as the other former republics of the USSR. Since then Ukraine faced the problem of searching of foreign policy and foreign economy orientations. The problem has aroused taking into consideration the tier of reasons. Nevertheless, in our opinion, only two reasons were decisive. The first of them is an internal one. Unlike the Western European developed countries, as well as bordering countries Ukraine has no experience of state structure during several centuries. Unfortunately, its society has got its independence extremely split, firstly, due to the policy of tsar Russia authorities, and later, due to the Russian ones and their own Bolsheviks. Although having been the part of the former USSR, Ukraine seemed to be the state with its formal features; virtually it had to be agrarian appendix of "the empire of evil" as the USSR used to be called in the West. Moreover, economical subjugation was followed by total suppression of any signs of national life under the pretext of the fight against imaginary "Ukrainian bourgeois nationalism".

Concerning the external reasons, neighboring nations have historically come to the level of comprehension of their own national state's necessity. In the 20th century, Ukrainians made two attempts of their statehood restoration. For the first time it happened at the end of the First World War, consequently

the revolution in Russia. Then the Ukrainian National Republic (UNR) had been established. It had existed for only several years. It collapsed not only due to internal weakness, but also due to its unfavorable position in the international arena. UNR was annexed by the Bolsheviks Russia's power, having been changed into the puppet Uk.SSR. The part of the Ukrainian lands appeared to be joined to the territory of Poland, Romania, Czechoslovakia, Hungary.

The next attempt to achieve the independence was made by the Ukrainians during the Second World War. However, it was doomed to failure just from the very beginning due to objective reasons having been formed on the international arena.

Only at the end of the 20th century the proper circumstances, which facilitated objectively the appearance of the independent Ukrainian state with 50 million of population on the European map. At once independent Ukraine faced many problems, which demanded and are still demanding immediate solution. The problem of determination and realization of trends of the foreign policy and foreign economy activities is one of the most important one among them.

Needless to say, that despite incredible internal difficulties (political splits of the society, state political elite weakness, social-economic weakness etc.), at the beginning of the 90s Ukraine began elaborating the strategy of rapprochement of European West, primarily, the international structures. Actually, the authors would like to make their report concerning European choice of Ukraine, taken as an example its relations with European Union.

The Establishing of the Euro-Union Contacts

More than 10 years ago, in September 1992 the first summit "Ukraine – Euro-Union" with the participation of the President of Ukraine and the Chairman of the European Community Commission took place. In the result, a year later the European Commission Delegation in Ukraine was established in October. The Ukrainian and the Euro-Union structures representatives' reunions, which were initiated in March 1994, became traditional. The Ukraine standpoint concerning Euro-Union on the legislative level was firstly formulated in the Main Tendencies of the foreign policy of Ukraine, approved by Verkhovna Rada in July 2, 1993. The membership of Ukraine in European Community, just as well as, its membership in other common European structures was defined as a prospective objective of the Ukrainian foreign policy.

As it is known, Ukraine signed an Treaty on Partnership and Cooperation (APC) with Euro-Union in June 14, 1994 had entered into force since March 1, 1998 after its ratification by Ukraine in November 1994 and all the states-members of the European Community. The treaty is to be fulfilled by three common bodies: the Council on Cooperation Problems, the Committee on Co-

operation Problems (both of them having comprised the European Union Council, Euro-Commission and Ukraine Cabinet of Ministers representatives) and the Committee on the Parliamentary Cooperation Problems, which include the members of the Euro-Union and Ukraine.

During the next years the relations between Ukraine and Euro-Union were characterized as follows: the activity of the common committee for holding of the economical and trade cooperation monitoring has been initiated since March 1995; the first sitting of the common committee Ukraine - Euro-Union took place in March 1, 1995; in June 1, 1995 the Temporal Treaty on Commerce was signed in Luxemburg during the summit of the President of Ukraine and the Chairman of the European Community Commission; in July 1995 in Brussels the Delegation of Ukraine within Euro-Union was opened; next year in June the European Union acknowledged the status of Ukraine as a country with transitional economy; in September 5, 1997 the first summit "Ukraine - Euro-Union" was held; the Second and the Third summits of that level took place in Vienna in October 16, 1998 and in July 23, 1999. According to the results of the Second summit, the relations of Ukraine and Euro-Union are framed as "strategic and unique partnership".

The important step on the way of practical development of the cooperation institutions was establishment of the Ukrainian fraction of the Council on Cooperation Problems between Ukraine and Euro-Union with the Prime Minister of Ukraine at the head according to the Decree of the Ukraine President in February 24, 1998, just as well as the Ukrainian fraction of the Commission on Cooperation Problems as a branch of the Council. The establishment of the legislative power of the subdivisions on cooperation with Euro-Union, Ukraine National Agency on Development and European Integration Problems and other branches were supposed to be established according to this Decree.

To provide effectiveness of Partnership and Cooperation Treaty the Council on Ukraine and Euro-Union Cooperation approved common work program within the Treaty in June 1998 and determined 16 certain trends of cooperation in it. The process of realization of the Treaty appeared to be the most effective in such domains as commerce, customs affairs, traffic, communication, justice, home affairs.

The important landmark on the way of relations shaping of Ukraine and Euro-Union was the adoption of the strategy of Ukraine integration into it by the Decree of the President of Ukraine in June 11, 1998. The main activities priorities of the executive bodies for the period until 2007 were defined in it, aiming to create necessary premises for equal membership of Ukraine in Euro-Union. The integration strategy of Ukraine into Euro-Union takes into consideration its clause of strategy concerning Ukraine in October 4, 1994; Common position concerning Ukraine in November 28, 1994; Common strategy on Ukraine in December 11, 1999 and also corresponding resolutions of Euro-

Union Council, declarations and other documents concerning Ukraine. Following the requirements of the above-mentioned documents by Ukraine would guarantee our state joining the European political, information, economical and judicial space. Getting the status of the associated membership in Euro-Union on this basis is the principal foreign policy priority of Ukraine in medium-term dimension and must correlate in time with getting of equal membership in Euro-Union by the states-candidates, bordering on Ukraine.

The branch programs and National program on Ukraine Integration into Euro-Union were elaborated based on Integration strategy of Ukraine into Euro-Union, approved by the Ukraine President's Decree in September 14, 2000. The Program is supposed to elaborate the complex of the practical measures concerning common principles of cooperation with Euro-Union, further development of institutions, and promotion of the relations evolution on each level – national, regional, local, on the level of state and non-state organizations, systematic, and purposeful formation of pro-European majority in the Ukrainian society. To the effect of the organizational providing of the national Program of the Ukraine integration into Euro-Union implementation the institution of the Authorized Representative on the European integration problems was established according to the decree of the Ukraine President in November 26, 2001.

The program determined short-term (2000-2001), medium-term (2002-2003) and long-term (2004-2007) objectives of the Ukraine integration into Euro-Union. According to them the priority tasks are as follows: harmonization of the Ukrainian legislature according to the norms of Euro-Union; getting membership in the World Trade Organization (WTO) as soon as possible; holding consultations and negotiations concerning the establishment of the free trade zone with Euro-Union; signing bilateral treaties on the free trade with the states-candidates to Euro-Union; making gradual steps to provide the Ukraine participation in the work of the European Conference; measures within Common foreign policy and policy of the Euro-Union security; common projects in the frames of the financial support programs of Euro-Union – PHARE and TASIC on bordering cooperation.

The principal conditions, necessary for the Ukraine participation in the European Conference and its further integration into European Community, were elaborated at Yalta summit “Ukraine - Euro-Union”, September 10-11, 2001. At that time, it meant: holding democratic and free Parliamentary elections in 2002, the necessity to obey freedom of press, getting over corruption, reaching the transparency of the economy, stable legislature, arranging the judicial system, financial and tax basis in accordance with the European standards. Ukraine initiated consideration of the questions connected with introducing of visa regime by the states-candidates to Euro-Union concerning Ukraine at the Yalta summit.

In 2001 the course of the Ukraine movement to the European integration was also characterized by the following facts: Ukraine was invited to participate in the Interparliamentary conference of Euro-Union; the Common plan of the actions in the domain of justice and home affairs was adopted; the Ukraine government approved the plan of the priority provisions implementing of the Program of the country integration into Euro-Union in 2001 and as a part of it, the work plan on the Ukrainian legislature adapting to the legislature of Community; in the context of the Program realization the opportunities of giving technical, financial and expert support to equip the state border of Ukraine were discussed with the experts of Euro-Union; there were held the consultations concerning possibility of spreading of some PHARE programs in the sphere of justice and home affairs of Ukraine; the centralized data bank of the organized criminal groups, involved in "money washing off", illegal migration and selling of people was formed with the help of Euro-Union, as well as single interdepartmental data bank "Narcobusiness" etc.

In May 28, 2002 the first sitting of the Leading committee on realization of the common program of European Commission and European Council cooperation concerning strengthening of democratic stability in Ukraine. The objective of the tripartite common program (for 2002-2003) is aid to Ukraine in discharging obligations taken while joining the European Council and in general, the promoting Ukrainian society democratization and European norms and standards implementing.

In the Ukraine President's Address to Verkhovna Rada of Ukraine "European Choice. The Conceptual Basis of the Strategy of the Economical and Social Development of Ukraine during 2002-2011" (May 2002) some practical steps of Ukraine directing to European integration are defined to create necessary premises for getting equal membership in Euro-Union by Ukraine in 2002-2011:

- 2002-2003 – Ukraine's getting membership in the World Trade Organization;
- 2003-2004 – conducting negotiations and signing treaty on the Ukraine association with Euro-Union. The change of the treaty on partnership and cooperation into European treaty on Ukrainian association with Euro-Union will define the new form of relations corresponding to long-term interests of Ukraine and make it closer to the final target – getting equal membership in Euro-Union.
- 2003-2004 – conducting negotiations concerning free trade zone creation between Ukraine and Euro-Union, which would suppose market institutions functioning, guaranteeing legal norms in business walk, stable and non-discrimination law frames, strictly defined property rights, using corresponding rules of goods promotion, the proper trans-bordering infrastructure organization etc.;

- 2002-2007 – arranging of the Ukraine legislature in accordance with Euro-Union legislature in the priority domains;
- 2004-2007 – procedures execution, necessary for realization of the Treaty on association of Ukraine with Euro-Union. Having got such associated status, Ukraine could be better informed of internal changes in Euro-Union, could informally participate in negotiations concerning different problems of the European scale and significance, get easy and larger access to the Euro-Union financial resources;
- 2005-2007 – conducting negotiations and establishing Customs union between Ukraine and Euro-Union with the aim of gradual getting rid of customs, law and technology obstacles in this sphere;
- 2007-2011 – complete fulfillment of the Treaty on association with Euro-Union and Copenhagen criteria of its membership;
- 2011 – making real premises for Ukraine’s entrance to Euro-Union.

Ukrainian European Integration Problems

The problem of the probable Ukraine joining the Euro-Union requires objective and versatile consideration paying attention to the interests and possibilities of the states-members of Community. While assuming that the next Ukrainian President will lead Ukraine “by deed, not by word” to the European norms and standards then the affiliation it to Euro-Union will cause much more difficulties than today’s expansion on each Central-Eastern European country. At least two main problems testify to it.

Firstly, Ukraine joining the Euro-Union will bring considerable changes into internal political balance into common policy pursuing and distribution of finance within Community. On one hand, taking into consideration demographic criterion Ukraine can have, at least, the same political power in the European institutions as Spain and Poland (27-28 votes in the Council of Ministers and 50-60 deputy seats in European Parliament). On the other hand, our state can “suit” the EU existing system of expenses in a perfect way, 80% of which are given to finance the common agricultural policy and structural aid. Ukraine is characterized by the huge agricultural sector, decayed heavy industry, a mostly damaged infrastructure and ecology, while average GNP per person does not exceed 3% of the average rate in EU. Thus, Ukraine, as if it were its member would have essential political power and the lion’s share of agricultural and structural funds. The Euro Commission expert Jan-Francois Dreve pointed out in his detailed research “Euro-Union Expansion, till where?” that “as well as Turkey, Ukraine, as a candidature, exceeds the possibilities of the Community budget”. French politician Jacque Delor expressed the same point of view at the meeting with the students of the Paris Institute of Political Sci-

ences three years ago. He is sure that European Union faces two main problems concerning the general process of expansion: the topical problem of Turkey nowadays and the problem of Ukraine in future. That is why the Ukraine joining the Euro-Union challenges more seriously than, for example, affiliation of the present outsiders Romania and Bulgaria, the GNP per person of which exceeds more than Ukraine's one.

Another important factor, aggravating Ukraine joining the Euro-Union is closely connected with the virtual problem of economical and political dependence of Ukraine on Russia, which has nothing to do with the Brussels vision of our state as Russia's zone of influence or Euro-Union unwillingness to contradict its more powerful strategic partner's interests. For a example, applying to the problem of visa regime implementing on the Polish-Ukrainian border, seems politically impossible for Ukraine to introduce the same visa regime on the border with Russia, moreover from the point of view of its home political situation than Russia's situation. At the same time, as it turned out in the relations with the countries of the Central Europe and the Western Balkans, the European Commission considers regional cooperation development an indispensable element of integration into Euro-Union and strives for making common regional approach.

It should be mentioned, when the Ukrainian authorities emphasize different foreign policy zeal of Ukraine and Russia, the potential of rapprochement of Russia and other states of Commonwealth with Euro-Union could not be exhausted by the Treaties on Partnership and Cooperation. Nowadays Euro-Union and Russian Federation discuss the idea of creating of Common European Economical Space (CEES), based on harmonization of Russian legislature with *acquis communautaire*. Taking into consideration similarity of political and social-economic trajectories of the region states (so-called Eurasian or Eastern-European model of transformation), then it seems rather probable that EU will suggest other states of Commonwealth, including Ukraine, making similar treaties on CEES creation. Doubtless to say, present Ukrainian authorities are hardly ever able to admit that Ukraine is closer to Russia, Kazakhstan or Moldova by its political and economical development than to Poland or Slovakia. Instead, the Europeans consider such approach as more appropriate to the general situation of the region and it could give an opportunity to Commonwealth states to move to Europe without breaking ties with each other, that is "to go to the West, not breaking with the East", as Leonid Kuchma wished in 1999. That is why; there is a common sense that Ukraine together with other states of Commonwealth could primarily create Common European Space with Euro-Union. And after successful realization of such common space, those states of the region willing to get full membership in Euro-Union, for example Ukraine, Moldova, Georgia could initiate negotiations on their joining Community.

It is worth mentioning that to join Euro-Union it is possible for Ukraine not to sign the treaty on association like those signed by the Central European countries. So, the Balkan states have been recently suggested the treaties on association and stabilization; and the states of European Association of Free Trade agreed to European Economical Space creation with European Union as long as in 1992.

Official Kyiv aspires that in its movement to Europe Ukraine does not differ from the Central European states and requires making of corresponding treaty on association. However, it should be mentioned that the treaty on association presupposes not only more sizeable financial aid, but implements the permanent monitoring mechanism by the economic development level and social-political situation of the country, which signed such treaty. Consequently, Euro-Union had to count all violations and drawbacks of Ukraine in reforms implementation in details, and present Ukrainian President could face the choice who to blame in prejudice "to treat us as a colony", - the Council of Europe or Euro-Union.

As Volodymyr Poselskyi, a known expert in this sphere says that the best scenario for Ukraine and expanded Europe could be another one, which requires the corresponding reform of the Treaty on Euro-Union. The treaty emphasizes that new Interparliamentary conference in 2004 would approve the Provision about special status of the associated member of Euro-Union. At present, according to the Article 310 of the Treaty on Euro-Union establishment, only the institute of associated treaties exists, which presupposes "mutual rights and duties, common actions and procedures". European Union uses a tier of varied associated tools, which, besides, potential candidates for membership and CES countries spread on 77 countries of Africa, of the Caribbean Sea and the Pacific ocean, and recently on Mexico and countries of MERKOSUR (treaties on association). The Treaties on partnership and cooperation with the CIS states have been made based on the Article 310 of the Treaty on Euro-Union establishment. From the institutional point of view TPC and, the Treaty on association, signed with the Central-European countries do not differ at all. Both types of treaties presuppose the establishment of the Council of Association or Council of Cooperation, corresponding committee and subcommittees on the Ministry level. Simultaneously, Iceland and Norway as members of CES have more opportunities to influence the approving of the EU legislative acts than Ukraine. That is why it is more correct to speak about existing of different forms of associated partnership, but not about associated membership.

Instead, the created status of the associated member would presuppose the real joining the Euro-Union based on adapting of the basic elements of European legislature (obeying democratic criterion and, probably, gradual affiliation to CES) and involving in the process of making and approving decision (without vote). The formula of the associated membership could be spread

to the European countries, which correspond to democratic criterion, but temporarily do not meet economical requirements or do not wish full membership (CIS countries, the Balkans, CES, Switzerland, and Turkey). It runs about external differentiation of normative-legal work of EU, that is differentiation of political and economical criteria. Francois Mitterand expressed the similar idea, which was supported by Jacque Delor and Charles Grant, an advisor of Tony Blair. The approval of such status would be real stimulus for democratic and pro-European forces of Ukraine in its fight for democratic and legal state establishment.

Nevertheless, for the present the future border of the expanded Euro-Union builds up not only "paper wall", it strictly splits two political and economical systems. On one hand, it runs about democracy, and on the other hand – authoritative regime, law prevails in one system, and presidential administration and force structures headed by it, on one hand the main criterion is the interests of a person, on the other hand – the interests of the corrupted political and economical leaders.

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Streszczenie

PRO-EUROPEJSKI WYBÓR UKRAINY: UWARUNKOWANIA WEWNĘTRZNE I ZEWNĘTRZNE

W pierwszej części swojego artykułu Autor przedstawia drogę Ukrainy do wolności w ciągu XX wieku – od przedmiotu do podmiotu polityki międzynarodowej, przedstawiając najważniejsze próby uzyskania niezależności aż do roku 1991 – rozpadu Związku Radzieckiego i proklamacji niepodległego państwa.

Kolejna część omawia historię dotychczasowych kontaktów pomiędzy Ukrainą a Unią Europejską, począwszy od pierwszych kontaktów na szczycie w 1992 r. Prezentuje najważniejsze etapy współpracy, spotkania z przywódcami i porozumienia z UE, jak również działalność wspólnie powołanych agencji i organizacji, oraz realizowane projekty i programy pomocowe. Na koniec prezentuje etapy działań do realizacji przed ewentualną akcesją Ukrainy do Unii Europejskiej w roku 2011.

Ostatnia część artykułu jest poświęcona trudnościom, na jakie napotykają plany akcesyjne Ukrainy. Pierwszą grupę stanowią problemy wewnętrzne związane z nieodzownymi zmianami organizacyjnymi wewnątrz tego organizmu politycznego, w przypadku przyjęcia takiego kraju jak Ukraina. Autor omawia je po kolei. Drugą grupę stanowią problemy wewnętrzne Ukrainy związane z jej przeszłymi dziejami i silną zależnością od Rosji w wielu dziedzinach, szczególnie w gospodarce. W końcowej części tego rozdziału Autor zastanawia się nad możliwym rozwojem wydarzeń i przyszłością Ukrainy w aspekcie jej związków z Unią Europejską.

ТРУДОВАЯ МИГРАЦИЯ ИЗ УКРАИНЫ: ОЖИДАЕМЫЕ ИЗМЕНЕНИЯ ПОСЛЕ РАСШИРЕНИЯ ЕВРОПЕЙСКОГО СОЮЗА

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Данные о численности внешних трудовых мигрантов из Украины как в странах старого, так и нового зарубежья практически отсутствуют. Оценочные данные не только публицистического, но и собственно научного характера (беда в том, что специалистов по миграции населения в Украине несравненно меньше чем желающих писать о ней), как правило, малодостоверны, в основном преувеличены с целью придать остроту проблеме. Наличие данных о численности трудовых мигрантов из Украины в странах приложения их труда являются неполными, охватывают не все группы даже легальных внешних трудовых мигрантов, не говоря уже о нелегальных, относятся к разным периодам и т.п. Большая доля занятых в сельском хозяйстве в составе внешних трудовых мигрантов из Украины обуславливает большие сезонные колебания их численности.

По данным Министерства иностранных дел Украины за пределами Украины на нелегальном положении пребывает до двух миллионов ее граждан [1, с.18]. Согласно мониторинга Уполномоченного Верховного Совета Украины по правам человека за границей находится приблизительно 5 млн. граждан Украины [2]. В средствах массовой информации встречаются и более высокие цифры – 7 млн. [3], а то и 8-9 млн. чел. [4]. Единственное, что объединяет экспертов по проблемам внешней трудовой миграции в Украине – переориентация основных потоков внешних трудовых мигрантов из Украины в страны СНГ, прежде всего в Россию, на страны Центральной и Западной Европы уже произошла.

При определении минимальной численности внешних трудовых мигрантов из Украины в странах Европейского Союза исходилось из гипотезы, что более 70% выезжающих из Украины в страны Европейского Союза туризма (организованного туризма) являются трудовыми мигрантами [5, с. 7]. Определенная таким способом минимальная численность

трудоустройства из Украины в странах Европейского Союза в 2002 г. была равной 72,8 тыс. чел., колеблясь в период 1996-2002 гг. от 55,6 тыс. чел. в 2001 г. до 73,3 тыс. чел. в 1997 г. В общей численности выезжающих из Украины в страны Европейского Союза удельный вес выезжающих с целью временного трудоустройства составлял 28%. Приблизительно таким же (28,6%) он был в 1996 г. В 1997 г. по сравнению с 1996 г. доля выезжавших с целью временного трудоустройства существенно снизилась (до 22,7%). После 1998 г. сложилась достаточно четко выраженная тенденция к ее росту (21,3% в 1998 г., 22,6% в 1999 г., 22,3% в 2000 г., 25,3% в 2001 г.).

Ожидается, что расширение Европейского Союза уже в ближайшее время приведет к уменьшению объемов внешних трудовых мигрантов у входящих в это региональное объединение странах, прежде всего из-за более жесткого пограничного режима и координации борьбы с нелегальной трудовой миграцией (получить шенгенскую визу сложнее чем соответствующую национальную визу ранее). Наличие Украины в содержании в дополнении к регламенту Совета Европейского Союза от 19 марта 1999 г. по „Определению третьих стран, граждане которых должны иметь визы при пересечении внешних границ стран-участниц” перечне стран (так званом „черном списке”), для граждан которых получение визы на въезд на территорию любой из стран Европейского Союза является обязательным, обеспечивает ее гражданам на довольно длительную перспективу достаточно жесткий визовый режим со стороны стран шенгенской группы. Преимущества одной визы для въезда практически во все европейские страны после уже ближайшего расширения Европейского Союза, о которых говорится все чаще [6, с. 90], представляются все же иллюзорными. Потребность в дополнительной рабочей силе в странах – новых членах Европейского Союза после предполагаемого оттока из них местных квалифицированных работников в страны Западной Европы может возрасти, что тоже следует учитывать при определении изменений во внешней трудовой миграции населения Украины.

В наибольшей мере после расширения Европейского Союза дилемма „продолжать выезды на работу в традиционные страны приложения труда или прекратить их (переориентироваться на другие страны)” станет перед трудовыми мигрантами. С целью выявления ориентированности украинских внешних трудовых мигрантов на продолжение выездов на работу за рубеж и на переселение на постоянное место жительства за рубеж в анкету выборочного социологического обследования „Социально-экономическое значение трудовой миграции граждан Украины” (ответственные исполнители С.И.Пирожков, Е.А.Малиновская, А.У.Хомра) были включены специальные вопросы. Объектом обследования выступали домохозяйств, члены которых после 1995 года выезжали на заработки или с целью тор-

говли за границу. Опрос проводился в городах Киеве и Черновцах, селе Прилбычи Яворивского района Львовской области. Всего было обследовано 350 домохозяйств внешних трудовых мигрантов, 150 и по 100 соответственно. В их составе находилось 463 внешних трудовых мигранта, характеристики и мнения которых нашли отражения в анкетах.

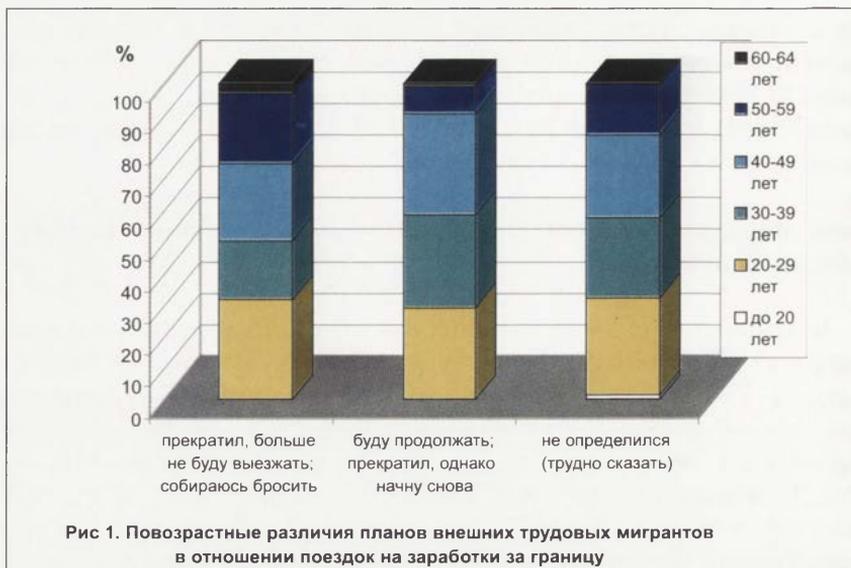
Планы внешних трудовых мигрантов в отношении поездок на заработки за рубеж

Большинство (50,4%) внешних трудовых мигрантов предполагают выезжать на заработки за рубеж в будущем. К ним следует прибавить тех, а их доля (15%) не такая уж малая, кто прекратил поездки на заработки за рубеж, но собирается их возобновить. Удельный вес прекративших и собирающихся прекратить поездки на заработки за рубеж составлял 19,8%. Доля внешних трудовых мигрантов, планирующих продолжать и возобновить прекратившиеся ранее поездки на заработки за рубеж была в 3,3 раза больше доли прекративших и собирающихся прекратить поездки на заработки за рубеж (у внешних трудовых мигрантов из Прилбыч – в 9,93 раза, из Черновцов – в 2,39 раза, из Киева – в 1,89 раза). Доли не определившихся с поездками на заработки за границу в будущем увеличиваются с увеличением величины поселения места выхода трудовых мигрантов (табл. 1).

Таблица 1. Планы внешних трудовых мигрантов в отношении поездок на заработки за границу, %

Планы внешних трудовых мигрантов в отношении поездок на заработки за границу	Киев	Черновцы	Прилбычи	Все
Прекратил, больше не буду выезжать	25,1	22,3	4,1	16,5
Собираюсь бросить	2,4	3,3	4,1	3,3
Прекратил, однако начну снова	17,4	20,7	8,7	15
Буду продолжать	34,7	40,5	72,7	50,4
Трудно сказать	20,4	13,2	10,4	14,8

Существенных различий между мужчинами и женщинами в отношении дальнейших поездок на заработки за границу не наблюдалось. Правда, в составе мужчин большими чем у женщин были доли планирующих продолжать поездки на работу за границу (соответственно 52,3% и 47,5%) и прекративших поездки на работу за границу, но намеренных их начать снова (соответственно 3,5% и 2,8%). Среди женщин доля не определившихся (трудно сказать) в отношении планов поездок на заработки за границу была незначительно большей чем среди мужчин.



Средний возраст тех, кто намерен продолжать поездки на заработки за границу (35,8 года) и кто прекратил поездки на заработки за границу, но намерен их начать снова (35,5 года) был меньше чем тех, кто прекратил выезжать на заработки за границу (38,8 года) и кто собирается бросить выезжать на заработки за границу (38,2 года). Большой средний возраст тех, кто прекратил выезжать на заработки за границу и тех, кто собирается бросить выезжать на заработки за границу по сравнению с теми, кто намерен продолжать поездки на заработки за границу и тех, кто прекратил поездки на заработки за границу, но намерен начать их снова, достигался прежде всего за счет различий в старших возрастных группах. В частности, в возрасте после 50 лет удельный вес прекративших выезжать на заработки за границу и намеренных их прекратить был в 2,72 раза большим удельного веса намеренных продолжать поездки на заработки за границу, включая тех, кто прекратил поездки на заработки за границу. Однако соответствующее превышение (в 1,3 раза) имело место в возрастной группе 20-24 летних (рис. 1). В структуре намеренных продолжать поездки на заработки за границу, включая тех, кто прекратил поездки на заработки за границу, но намерен их начать снова, по сравнению с соответствующими показателями структуры прекративших выезжать на заработки за границу и намеренных их прекратить большими были доли возрастных групп 30-34 летних (в 2.25 раза), 45-49 летних (в 1,42 раза), 40-44 летних (в 1,26 раза), 25-29 летних (в 1,07 раза). Доля не определившихся (трудно сказать) в отношении планов поездок на заработки за границу большей чем доля намеренных продолжать поездки на заработки за границу, включая тех, кто прекратил поездки на заработки

за границу, но намерен их начать снова, и доля прекративших выезжать на заработки за границу и намеренных их прекратить была в возрастной группе 35-39 летних.

Брачные структуры намеренных продолжать поездки на заработки за границу, включая тех, кто прекратил поездки на заработки за границу, но намерен их начать снова, и прекративших выезжать на заработки за границу и намеренных их прекратить были схожими. Заданность миграционных планов внешних трудовых мигрантов их возрастом обусловила большую долю вдовых и меньшую долю холостых (незамужних) в составе прекративших выезжать на заработки за границу и намеренных их прекратить чем в составе намеренных продолжать поездки на заработки за границу, включая тех, кто прекратил поездки на заработки за границу, но намерен их начать снова (табл.2). Доли пребывающих в гражданском браке и разведенных были, естественно, меньшими соответственно в 2,12 раза и в 1,21 раза чем в составе прекративших выезжать на заработки за границу и намеренных их прекратить чем в составе намеренных продолжать поездки на заработки за границу, включая тех, кто прекратил поездки на заработки за границу, но намерен их начать снова. В составе не определившихся с планами в отношении поездок на заработки за границу доли состоящих в гражданском браке и разведенных были большими (соответственно в 2,88 раза и в 1,81 раза) по сравнению с остальными опрошенными внешними трудовыми мигрантами. Несколько большим в их составе по сравнению с остальными опрошенными внешними трудовыми мигрантами был удельный вес холостых (незамужних).

Таблица 2. Влияние брачного состояния внешних трудовых мигрантов на их планы в отношении поездок на заработки за границу, %

Планы внешних трудовых мигрантов в отношении поездок на заработки за границу	холост (незамужем)	женат (замужем) (в зарегистрированном браке)	женат (замужем) (в гражданском браке)	разведен (а)	вдовец (вдова)
Прекратил, больше не буду выезжать; собираюсь бросить	20,9	67,0	1,1	7,7	3,3
Буду продолжать, прекратил, однако начну снова	21,3	64,8	2,3	9,3	2,3
Трудно сказать	22,1	54,4	5,9	16,2	1,5

Уровень образования намеренных продолжать поездки на заработки за границу, включая тех, кто прекратил поездки на заработки за границу, но намерен их начать снова (11,7 года обучения) был меньшим чем прекративших выезжать на заработки за границу и намеренных их прекратить (12,4 года обучения). Данная разница достигалась за счет большего удельного веса внешних трудовых мигрантов с высшим (в 1,79

раза) и средним специальным (в 1,37 раза) образованием в составе прекративших выезжать на заработки за границу и намеренных их прекратить. Максимальные значения долей внешних трудовых мигрантов с полным средним и более низким образованием и профессионально-техническим образованием отмечались у намеренных продолжать поездки на заработки за границу, включая тех, кто прекратил поездки на заработки за границу, но намерен их начать снова. Более молодая возрастная структура намеренных продолжать поездки на заработки за границу, включая тех, кто прекратил поездки на заработки за границу, но намерен их начать снова, обусловила в их структуре больший по сравнению со структурой прекративших выезжать на заработки за границу и намеренных их прекратить удельный вес лиц с незаконченным высшим образованием (табл.3). У неопределившихся с планами в отношении поездок на заработки за границу уровень образования был несколько большим (12,6 года обучения) чем у прекративших выезжать на заработки за границу и намеренных их прекратить. В составе неопределившихся с планами в отношении поездок на заработки за границу большими чем в двух других привлеченных в анализ группах внешних трудовых мигрантов были доли лиц с высшим и незаконченным высшим образованием.

Таблица 3. Влияние образования внешних трудовых мигрантов на их планы в отношении поездок на заработки за границу, %

Планы внешних трудовых мигрантов в отношении поездок на заработки за границу	Образование				
	полное среднее и более низкое	профессионально-техническое	среднее специальное	незаконченное высшее	высшее
Прекратил, больше не буду выезжать; собираюсь бросить	20,9	15,4	24,2	4,4	35,2
буду продолжать, прекратил, однако начну снова	35,5	20,3	17,6	6,6	19,6
трудно сказать	19,1	11,8	22,1	11,8	35,3

Имело намерение выезжать за рубеж с целью заработка (буду продолжать, прекратил, однако начну снова) 77,7% незанятых в Украине, 76,9% студентов, школьников, 73,7% безработных, 71,5% формально занятых, но фактически не занятых. Высокой была доля имевших намерение выезжать за рубеж с целью заработка среди работавших на государственных (кооперативных) предприятиях (табл. 4). В относительно меньшей мере на продолжение работы за рубежом были ориентированы имеющие собственный бизнес, работавшие на частных предприятиях, фирмах, а также пенсионеры. Удельный вес прекративших и больше не намеренных выезжать за рубеж с целью заработка наибольшего значения достигал у пенсионеров. Более чем каждый четвертый работавший на

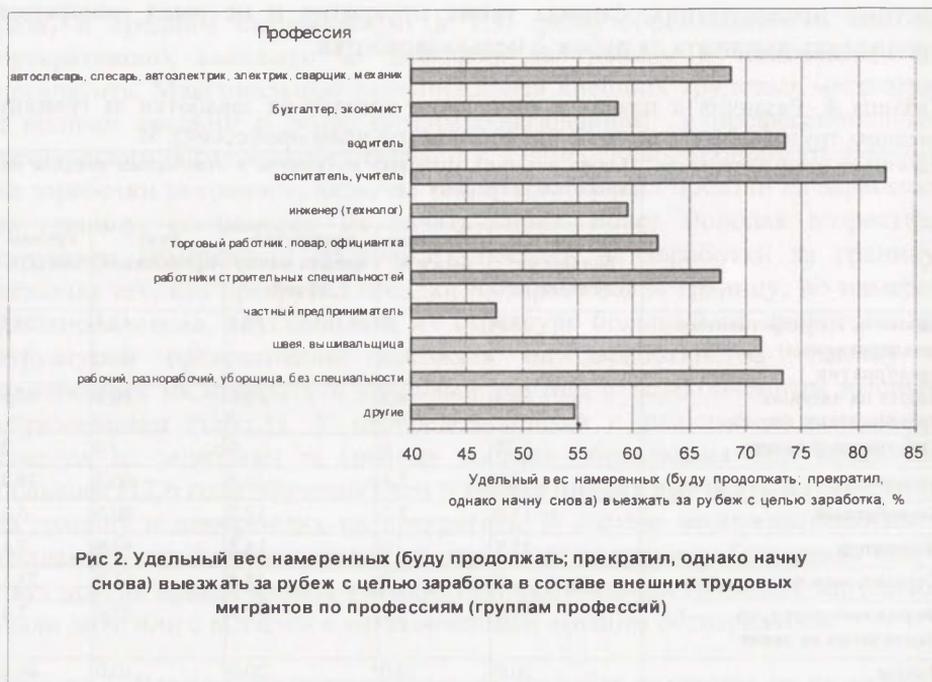
частных предприятиях, фирмах также прекратил и не имел намерения продолжать выезжать за рубеж с целью заработка.

Таблица 4. Различия в планах в отношении поездок на заработки за границу внешних трудовых мигрантов по профессиям (группам профессий), %

Занятие по месту жительства	Планы внешних трудовых мигрантов в отношении поездок на заработки за границу				
	прекратил, больше не буду выезжать	собираюсь бросить	прекратил, однако начну снова	буду продолжать	трудно сказать
работа на государственном (кооперативном) предприятии	15,9	0	19,5	43,9	20,7
работа на частных предприятиях, фирмах	26,4	4,2	23,6	30,5	15,3
Собственный бизнес	38	6	6	42	8
не занят	4,7	3,4	11,5	66,2	14,2
Безработный	15,8	5,2	13,2	60,5	5,3
Пенсионер	35,7	0	14,3	42,9	7,1
Студент, школьник	0	0	15,4	61,5	23,1
Формально занят, но фактически не занят	17,9	3,5	17,9	53,6	7,1
Другое	20,0	10,0	20,0	10,0	40,0

На продолжение работы за рубежом было ориентировано 82,4% выезжавших за рубеж с целью заработка воспитателей и учителей, 73,5% водителей, 73,3% рабочих, разнорабочих, уборщиц, не имеющих специальности, 71,4% швей и вышивальщиц. В меньшей мере имели намерение выезжать на работу с целью заработка предприниматели; бухгалтеря, экономисты; инженеры (технологи) (рис. 2).

На ориентированности внешних трудовых мигрантов из Украины длительность их пребывания за рубежом сказывается несущественно. Средняя длительность пребывания за рубежом во время последнего выезда планирующих прекратить выезжать на заработки за рубеж (прекратил, больше не буду выезжать; собираюсь бросить) была в 1,17 раза большей чем планирующих продолжать выезжать с целью заработка за рубеж (буду продолжать; прекратил, однако начну снова). В структуре не намеренных в будущем выезжать за рубеж с целью заработка по сравнению со структурой планирующих продолжать выезжать на заработки за рубеж большими были доли пребывавших за рубежом во время последнего выезда 7 и менее дней (в 1,45 раза) и 186 дней и более (в 1,49 раза).



Влияние расширения ЕС на внешнюю трудовую миграцию населения Украины

Информированность респондентов о введении визового режима для граждан Украины странами Центральной Европы (непременное условие вступления их в Европейский Союз) была достаточно высокой. Лишь 12% из них не знали о введении визового режима для граждан Украины странами Центральной Европы, еще 1,2% не смогли (не захотели) ответить на данный вопрос. Однако относительно полной информацией о уже введенном и вводимом в ближайшем будущем визовом режиме для граждан Украины владело лишь немногим более трети (33,7%) внешних трудовых мигрантов. С увеличением величины поселения выхода внешних трудовых мигрантов информированность их о введении визового режима для граждан Украины странами Центральной Европы увеличивается (рис. 3). На информированности внешних трудовых мигрантов о скором введении странами Центральной Европы визового режима для граждан Украины их возраст практически не сказывается. Средний возраст точно знавших, что страны Центральной Европы в ближайшем будущем введут визовый режим для граждан Украины, был равен 36,64 года, что-то слышавших – 36,73 года, не слышавших – 36,44

года. С увеличением возраста увеличивается удельный вес уклонившихся от ответа, однако он был небольшим по величине. С увеличением образования информированность внешних трудовых мигрантов о скором введении странами Центральной Европы визового режима для граждан Украины увеличивается. Уровень образования знавших точно об этом составлял 12,73 года обучения, что-то слышавших – 11,68, не знавших – 11,42, затруднявшихся с ответом – 10,25 года обучения. Данная тенденция просматривается также структурно: с увеличением образования удельный вес точно знавших о скором введении странами Центральной Европы визового режима для граждан Украины увеличивается (не знавших – уменьшается) (табл. 5).

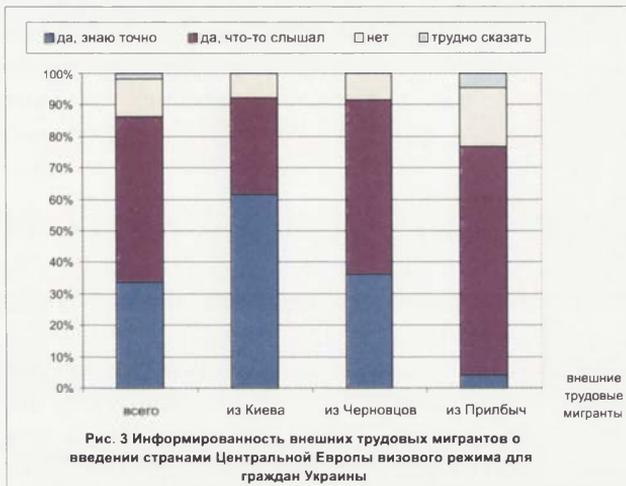


Таблица 5. Влияние образования внешних трудовых мигрантов из Украины на их информированность о скором введении странами Центральной Европы визового режима для граждан Украины, %

Информированность о том, что страны Центральной Европы Ввели или будут вводить визовый режим для граждан Украины	Образование				
	Неполное среднее и более низкое	полное среднее	Профессиональ но-техническое	среднее специальное и незаконченное высшее	Высшее
Да, знаю точно	27,3	15,6	34,5	35,2	52,2
Да, что-то слышал	18,2	71,1	44,0	54,1	40,0
Нет	45,4	11,0	16,7	10,7	7,8
Трудно сказать	9,1	2,3	4,8	0	0

Недостаточная, хотя и относительно высокая информация о введении визового режима для граждан Украины странами Центральной

Европы обусловила трудности в ответах на вопросы об отказе от поездок на заработки за границу под воздействием введения виз и об избрании других стран для поездок на заработки под воздействием введения виз. Затруднялся ответить на вопрос об отказе от поездок на заработки за границу под воздействием введения виз для граждан Украины странами Центральной Европы немногим более чем каждый четвертый (25,4%). В составе внешних трудовых мигрантов из Прилбыч и Черновцов значения данного показателя были большими среднего значения по всему массиву опрошенных внешних трудовых мигрантов (соответственно на 7,5% и на 5,1%). Доля тех, кого введение виз для граждан Украины странами Центральной Европы заставит отказаться на заработки за границу, была в 3,31 раза меньшей доли тех, на планы поездок за границу которых введение визового режима не скажется (у внешних трудовых мигрантов из Киева – в 4,24 раза, из Черновцов – в 3,99 раза, из Прилбыч – в 2,38 раза). По сравнению с ответом на вопрос о воздействии введения виз для граждан Украины странами Центральной Европы на планы выезда на работу за границу доля не сумевших ответить (спрятавшихся под ничего не обязывающее „трудно сказать“) на вопрос об воздействии виз на изменение страны приложения труда была существенно в (в 2,02 раза) большей (у внешних трудовых мигрантов из Прилбыч- в 2,29 раза, из Киева – в 1,87 раза, из Черновцов – в 1,78 раза). Удельный вес намеревающихся под воздействием введения виз для граждан Украины странами Центральной Европы избрать другие страны для поездок на заработки как в целом по массиву внешних трудовых мигрантов, так и по каждому поселению их выхода был небольшим (табл. 6). Надежд на получение близкой по оплате работы с аналогичными условиями труда в других странах практически не имеется: Россия ни при каких обстоятельствах не откроет свои границы для более дешевой рабочей силы из Украины [7, с. 20]. Этим можно объяснить большие различия долей имеющих и не имеющих намерения после введения визового режима избрать другие страны для поездок на заработки. Очень высокая доля не намеревающихся и очень низкая доля намеревающихся под воздействием введения визового режима для граждан Украины странами Центральной Европы избрать другие страны для поездок на заработки отмечается у внешних трудовых мигрантов из Киева, что вероятно, во многом было обусловлено их большей информированностью о данном процессе чем внешних трудовых мигрантов из Черновцов и Прилбыч.

Таблица 6. Воздействие введения виз для граждан Украины странами Центральной Европы на отказ внешних трудовых мигрантов от поездок на заработки за границу и на избрание других стран для поездок на заработки, %

Введение виз заставит Вас	Отказаться от поездок на заработки за границу				избрать другие страны для поездок на заработки			
	Киев	Черновцы	Прилбычн	Все	Киев	Черновцы	Прилбычи	Все
да	14,8	14,7	21,5	17,3	6,1	15,5	9,3	9,8
нет	62,7	58,6	51,2	57,3	51,8	37,1	28,1	39
трудно сказать	22,5	26,7	27,3	25,4	42,1	47,4	62,6	51,2

С увеличением возраста доли тех, кого введение визового режима соседними с Украиной странами заставит отказаться от поездок на заработки, увеличиваются (табл. 7). Средний возраст намеренных выезжать на заработки за рубеж после введения виз (36,42 года) был меньшим чем тех, кого введение виз заставит отказаться от поездок на заработки за рубеж (38,04 года). Также меньшим был средний возраст не намеренных избрать другие страны для поездок на заработки за рубеж после введения соседними с Украиной странами визового режима (36,73 года) по сравнению с предполагавшими сделать это (37,89 года). Уровень образования тех внешних трудовых мигрантов из Украины, кого введения визового режима странами Центральной Европы для граждан Украины заставит отказаться от поездок на заработки за границу (11,85 года обучения) был незначительно, но все же меньшим тех, кто намерен выезжать на заработки за границу после введения визового режима (12,04 года обучения). Данное превышение достигалось главным образом за счет большего удельного веса в составе намеренных продолжать выезжать на заработки за рубеж после введения визового режима лиц с незаконченным высшим и высшим образованием, а также лиц со профессионально-техническим образованием. С возможностью переориентации поездок на заработки на другие страны после введения странами Центральной Европы визового режима для граждан Украины труднее всего было определиться внешним трудовым мигрантам с относительно низким образованием; их уровень образования был равным 11,42 года обучения. По сравнению с ними уровень образования тех внешних трудовых мигрантов из Украины, которые не намеревались избрать другие страны для поездок на заработки, был существенно большим (12,3 года обучения). Меньший уровень образования намеренных переориентироваться на работу в других странах после введения визового режима странами Центральной Европы для граждан Украины (11,93 года обучения) был обусловлен, вероятно, их менее устойчивым положением на рынке труда стран приложения труда. По сравнению с образовательной структурой внешних трудовых мигрантов из Украины, намеренных избрать другие

страны для поездок на заработки, в образовательной структуре не намеренных делать этого большим был удельный вес лиц с незаконченным высшим (в 1,85 раза), высшим (в 1,18 раза) и средним специальным (в 1,18 раза) образованием. Средняя длительность пребывания за рубежом во время последнего выезда внешних трудовых мигрантов из Украины, которые под воздействием введения виз для граждан Украины странами Центральной Европы были намерены отказаться от поездок на заработки за границу (179 дней) или избрать другие страны для поездок на заработки (173 дня), была меньше чем не намеренных делать этого (соответственно 199 дней и 228 дней). В составе намеренных избрать другие страны для поездок на заработки под воздействием введения виз для граждан Украины странами Центральной Европы удельный вес пребывавших за рубежом во время последнего выезда 7 и менее дней был в 1,64 раза большим чем не намеренных менять страны приложения труда (пребывавших за рубежом во время последнего выезда 186 дней и более – в 1,37 раза меньшим).

Таблица 7. Повозрастные различия воздействия введения виз для граждан Украины странами Центральной Европы на отказ внешних трудовых мигрантов от поездок на заработки за границу и на избрание других стран для поездок на заработки, %

Введение виз заставит Вас	Отказаться от поездок на заработки за границу			избрать другие страны для поездок на заработки		
	до 30 лет	30-49 лет	50-64 года	до 30 лет	30-49 лет	50-64 года
Да	15,1	17,8	19,0	9,6	8,2	12,4
Нет	57,6	58,9	54,6	35,3	42,8	37,2
трудно сказать	27,3	23,3	26,4	55,1	49,0	50,4

Приемлемая стоимость виз для выезжающих на заработки за рубеж по оценкам внешних трудовых мигрантов составляла 201,7 гривен. Согласно оценок внешних трудовых мигрантов из Прилбыч приемлемая стоимость виз была равной 107,4 гривны, из Киева – 211,9 гривны, из Черновцов – 373,8 гривны. Приемлемой в размере 150 гривен и меньше стоимость виз для тех, кто выезжает на заработки за рубеж, назвало 68,9% внешних трудовых мигрантов. Данная доля у внешних трудовых мигрантов из Прилбыч была в 1,37 раза большей чем у внешних трудовых мигрантов из Киева и в 2,01 раза – чем у внешних трудовых мигрантов из Черновцов. Тенденция к уменьшению долей считающих приемлемой стоимость виз для выезжающих на заработки за рубеж с увеличением стоимости виз просматривается достаточно четко. Все же внешние трудовые мигранты понимают, что стоимость виз не может быть очень низкой (до 50 гривен). В первую очередь данное понимание присуще внешним трудовым мигрантам из Прилбыч, лежащих близко польско-

украинской границы – 44,2% из них приемлемой считают стоимость виз для тех, кто выезжает на заработки за рубеж, в пределах 100-150 гривен (табл.8.). На фоне господствующей тенденции выделяется очень высокий удельный вес в структуре внешних трудовых мигрантов из Черновцов тех, кто считает приемлемой стоимость виз для выезжающих на заработки за рубеж в размере 451-500 гривен. С увеличением возраста внешних трудовых мигрантов приемлемая стоимость визы уменьшается. Так, для внешних трудовых мигрантов молодого возраста приемлемой является стоимость визы 222,1 гривны, среднего возраста – 202 гривны, старшего возраста – 176,3 гривны. Достаточно тесная взаимосвязь выявлена между приемлемой стоимостью виз и образованием внешних трудовых мигрантов. Если для внешних трудовых мигрантов с полным средним и более низким образованием приемлемая стоимость виз была равной 126 гривен, с профессионально-техническим образованием – 169,6 гривен, то для внешних трудовых мигрантов со средним специальным и незаконченным высшим образованием – 261,3 гривны, с высшим образованием – 267,1 гривны.

Таблица 8. Приемлемая по оценкам внешних трудовых мигрантов стоимость виз для выезжающих на заработки за рубеж, %

Приемлемая стоимость виз для тех, кто выезжает на заработки за рубеж, гривен	Киев	Черновцы	Прилбычи	Все
До 50	24,1	26,7	5,8	16,8
51-100	22	14	36,6	26,5
101-150	17	2,3	44,2	25,6
151-250	13,5	17,4	8,2	12,1
251-400	10,6	1,2	5,2	6,2
451-600	7,8	23,3	0	7,8
601-1000	1,4	9,3	0	2,5
Больше 1000	3,6	5,8	0	2,5

Почти каждый пятый (24,7%) внешний трудовой мигрант затруднялся оценить воздействие введения виз странами Центральной Европы для граждан Украины на внешнюю трудовую миграцию населения Украины. Столько же прогнозировало снижение объемов внешней трудовой миграции населения Украины. Все же большинство (32,5%) предполагало, что после введения визового режима странами Центральной Европы для граждан Украины объемы внешней трудовой миграции населения Украины останутся на прежнем уровне. Почти каждый пятый (18,1%) прогнозировал переориентацию потоков внешней трудовой миграции населения Украины на другие страны. По сравнению с внешними трудовыми мигрантами из Черновцов и Прилбыч внешние

трудоу мигранты из Киева переориентацию потоков внешних трудовых мигрантов после введения виз для граждан Украины странами Центральной Европы прогнозировали реже. Если в составе внешних трудовых мигрантов из Прилбыч доля предполагавших снижение объемов внешних трудовых мигрантов после введения визового режима для граждан Украины странами Центральной Европы была равной 28,5% (в составе внешних трудовых мигрантов из Киева – 24,7%, то в составе внешних трудовых мигрантов из Черновцов – 18,9%. В целом представляется, что внешние трудовые мигранты из Прилбыч оценивают изменения объемов, структур и направлений внешней трудовой миграции под воздействием введения виз для граждан Украины странами Центральной Европы более отрицательно чем внешние трудовые мигранты из Киева и Черновцов. Средний возраст считающих, что под воздействием введения виз странами Центральной Европы объем внешней трудовой миграции из Украины сократится, составлял 37,2 года (останется на прежнем уровне – 36,26 года, произойдет переориентация потоков внешних трудовых мигрантов на другие страны – 36,18 года. Более высоким (37,35 года) был средний возраст тех, кто затруднился с ответом на этот вопрос. Уровень образования считающих, что под воздействием введения виз странами Центральной Европы для граждан Украины произойдет переориентация потоков внешних трудовых мигрантов на другие страны (12,25 года обучения), был незначительно большим, чем тех, кто предполагал сокращение (12,11 года обучения) и сохранение на прежнем уровне (12,01 года обучения) объемов внешних трудовых мигрантов из Украины: у затруднившихся с ответом на этот вопрос значение данного показателя было ощутимо меньшим (11,61 года обучения).

Вступление стран Центральной Европы в ЕС приведет, что общепринято, к ускорению экономического роста в них. В периоды экономического роста число рабочих мест для специалистов низкой квалификации, на которых преимущественно заняты внешние трудовые мигранты из Украины, стремительно уменьшается [8, с.15]. Поэтому ощущение опасности введения виз для граждан Украины странами Центральной Европы довлеет над внешними трудовыми мигрантами. С наибольшей силой оно проявляется в ответах на вопрос о последствиях для Украины введения виз для граждан Украины странами Центральной Европы. Больше половины (55%) респондентов видят во введении виз странами Центральной Европы для граждан Украины то, что люди (население Украины) не смогут зарабатывать на жизнь. Доли тех, кто последствия введения виз для граждан Украины странами Центральной Европы видит в ослаблении семейных, родственных и прочих контактов и в ослаблении деловых и бизнесовых контактов были существенно

меньшими (соответственно 13,3% и 8,5%). Лишь каждый седьмой внешний трудовой мигрант считал, что введение виз для граждан Украины странами Центральной Европы не изменит ничего. Для внешних трудовых мигрантов из Прилбыч все последствия введения визового режима для граждан Украины странами Центральной Европы сводились к одному – люди не смогут зарабатывать на жизнь (табл. 9). Это последствие доминировало и в структуре названных внешними трудовыми мигрантами из Черновцов последствий введения визового режима для граждан Украины странами Центральной Европы. Внешними трудовыми мигрантами из Киева наиболее часто называлось такое последствие для Украины введения визового режима для граждан Украины странами Центральной Европы как ослабление семейных, родственных и прочих контактов; для внешних трудовых мигрантов из Прилбыч и Черновцов данное последствие было малозначимым. В структуре названных внешними трудовыми мигрантами среднего возраста (30-49 лет) последствий для Украины введения виз странами Центральной Европы для граждан Украины большими по сравнению со структурами двух других анализируемых возрастных групп (младшего (до 30 лет) и старшего (50-64 года) возраста) были доли таких последствий как ничего не изменится и население не сможет зарабатывать себе на жизнь; молодого возраста – пострадают деловые и бизнесовые контакты; старшего возраста – не могут поддерживаться семейные, родственные и прочие контакты. Средний возраст отдавших предпочтение такому последствию как не смогут поддерживаться семейные, родственные и прочие контакты (38,45 года) был большим чем средний возраст предпочтение всем иным последствиям для Украины (36,66 года) и не определившихся с таковыми последствиями (35,93 года). Сравнительно низким (11,52 года обучения) на общем фоне был уровень образования внешних трудовых мигрантов, назвавших в качестве последствия для Украины введения виз для граждан Украины странами Центральной Европы то, что население не сможет Украины не сможет зарабатывать на жизнь. Более низкое значение уровня образования этой группы внешних трудовых мигрантов по сравнению с остальными внешними трудовыми мигрантами достигалось за счет большей доли в их составе лиц с полным средним и более низким образованием (в 2,83 раза) и меньших долей лиц с высшим (в 2,11 раза) и средним специальным и незаконченным высшим (в 1,26 раза) образованием. Уровни образования назвавших в качестве последствий для Украины введения виз для граждан Украины странами Центральной Европы такие как „не смогут поддерживаться семейные, родственные и прочие контакты” (12,92 года обучения), „не изменится ничего” (12,88 года обучения) и „пострадают деловые и бизнесовые контакты” (12,71 года обучения) различались между собой меньше.

Таблица 9. Названные внешними трудовыми мигрантами последствия для Украины введения визового режима для граждан Украины странами Центральной Европы, %

Последствия введения виз для граждан Украины странами Центральной Европы для Украины	Киев	Черновцы	Прилбычи	Все
Население не сможет поддерживаться семейные, родственные и прочие контакты	28,9	5,0	1,7	13,3
не смогут зарабатывать на жизнь	25,8	46,3	93,6	55
Пострадают деловые и бизнесовые контакты	11,1	15,7	0,6	8,5
не изменится ничего	22,1	19,8	1,2	14,1
Другое	1,0	0	0	0,4
трудно сказать	11,1	13,2	2,9	8,7

Меньшая заинтересованность (не для себя) в знаниях последствий введения виз для граждан Украины странами Центральной Европы (Польши, Венгрии, Чехии, Словакии, Болгарии, Румынии) в сочетании со слабым знанием проблем их социально-экономического и демографического развития обусловили очень большую долю тех, кто затруднялся ответить на данный вопрос. В частности, доля тех, кто затруднялся ответить на вопрос о последствиях введения виз для граждан Украины странами Центральной Европы для стран Центральной Европы была в 2,75 раза большей доли тех, кто затруднялся ответить на вопрос о последствиях введения виз для граждан Украины странами Центральной Европы для граждан Украины (у внешних трудовых мигрантов из Прилбыч – в 2,41 раза, из Киева – в 2,22 раза, из Черновцов – в 2,01 раза). Поселенческие колебания долей тех, кто затруднялся с ответом на вопрос о последствиях введения виз для граждан Украины странами Центральной Европы для стран Центральной Европы были не очень большими (табл. 10). Наиболее часто внешние трудовые мигранты считают, что введение виз для граждан Украины странами Центральной Европы приведет к дефициту рабочей силы в данных странах. Почти каждый пятый (18,5%) внешний трудовой мигрант предполагал, что введение виз для граждан Украины странами Центральной Европы ничего не изменит в странах Центральной Европы. Доли назвавших в качестве последствий введения виз для граждан Украины странами Центральной Европы трудности сбыта товаров их собственного производства и защиту от нелегалов были соответственно равны 11,9% и 9,1%. Высокая значимость такого последствия как дефицит рабочей силы в структуре последствий введения виз для граждан Украины странами Центральной Европы задавалась высокой долей назвавших его в составе внешних трудовых мигрантов из Прилбыч. Наибольшей ее (доли) значение было также среди ответов внешних трудовых мигрантов из Киева. Внешние трудовые мигранты из

Черновцов, наоборот, считали данное последствие малозначимым. Важную роль среди последствий введения виз для граждан Украины странами Центральной Европы для стран Центральной Европы, названных внешними трудовыми мигрантами из Черновцов играли трудности в сбыте товаров их собственного производства. Никто из опрошенных из Прилбычи не считал, что введения виз для граждан Украины странами Центральной Европы защитит эти страны от нелегальных мигрантов.

Таблица 10. Названные внешними трудовыми мигрантами последствия для стран Центральной Европы введения визового режима для граждан Украины странами Центральной Европы, %

Последствия введения виз для граждан Украины странами Центральной Европы для стран Центральной Европы (Польши, Венгрии, Чехии, Словакии, Болгарии, Румынии)	Киев	Черновцы	Прилбычи	Все
защитят от нелегалов	15,8	12,8	0	9,1
Приведут к дефициту рабочей силы	25,7	6,8	65,2	36
Приведут к трудностям в сбыте товаров собственного производства	15,3	22,2	1,7	11,9
ничего не изменится	18,6	29,1	11,6	18,5
Другое	0	2,6	0	0,6
трудно сказать	24,6	26,5	21,5	23,9

С увеличением возраста доли внешних трудовых мигрантов, считающих, что введение виз для граждан Украины странами Центральной Европы приведет в странах Центральной Европы к дефициту рабочей силы, уменьшаются, а доли считающих, что после введения виз для граждан Украины странами Центральной Европы в странах Центральной Европы ничего не изменится, и что увеличатся трудности в сбыте товаров, производимых в странах Центральной Европы, увеличиваются (табл. 11). Потому средний возраст считающих, что введение виз для граждан Украины странами Центральной Европы приведет к дефициту в них рабочей силы (39 лет), был большим чем средний возраст внешних трудовых мигрантов, назвавших другие последствия введения виз для граждан Украины странами Центральной Европы для этих стран (приведет к трудностям в сбыте товаров, производимых странами Центральной Европы – 36,89 года, будет способствовать защите от нелегалов – 37,02 года).

Таблица 11. Влияние возраста внешних трудовых мигрантов на названные ими последствия для стран Центральной Европы введения визового режима для граждан Украины странами Центральной Европы, %

Последствия введения виз для граждан Украины странами Центральной Европы для стран Центральной Европы (Польша, Венгрии, Чехии, Словакии, Болгарии, Румынии)	Возраст, лет		
	до 30	30-49	50-64
защитят от нелегалов	9,7	8,1	10,2
Приведут к дефициту рабочей силы	39,3	36,4	31,5
Приведут к трудностям в сбыте товаров собственного производства	9	12,4	14,2
ничего не изменится	17,9	18,2	19,7
Другое	24,1	23,9	23,6
трудно сказать	0	1,0	0,8

Наименьший уровень образования (11,31 года обучения) отмечался у тех внешних трудовых мигрантов из Украины, которые в качестве последствия введения виз для граждан Украины странами Центральной Европы назвали образование дефицита рабочей силы в этих странах. Тенденция к уменьшению долей назвавших это последствие с увеличением образования просматривается очень четко, при этом темпы данного уменьшения были большими (табл. 12). Наоборот, доли назвавших в качестве последствия для стран Центральной Европы введение виз для граждан Украины этими странами трудности сбыта товаров производства этих стран и защиту от нелегальных мигрантов с увеличением образования увеличиваются. Свое проявление данная тенденция нашла в сравнительно высоком уровне образования данных групп внешних трудовых мигрантов из Украины (соответственно 13,04 года обучения и 13,14 года обучения). Средний уровень образования внешних трудовых мигрантов, считающих, что никаких последствий (ничего не изменится) введения виз для граждан Украины странами Центральной Европы для этих стран не предвидится, был равен 12,02 года обучения.

Хотя в разработке нового режима западной границы Украине отводится скорее роль статиста чем участника, эту роль нельзя рассматривать как неизменную, раз и навсегда данную. Необходимо усвоить, что не только Украина заинтересована в интеграции в ЕС, но и ЕС заинтересован в добрососедских отношениях с Украиной. Достижение последнего путем диктата более сильного более слабому соседу вряд ли удастся достичь. Украине необходимо, постепенно, преодолевая роль статиста на переговорах с ЕС, добиваться формирования единого с ЕС экономического пространства, миграционного пространства, рынка труда, следствием которого не может не быть смягчение и в дальнейшем отмена визового режима.

Таблица 12. Влияние образования внешних трудовых мигрантов на названные ими последствия для стран Центральной Европы введения визового режима для граждан Украины странами Центральной Европы, %

Последствия введения виз для граждан Украины странами Центральной Европы для стран Центральной Европы (Польши, Венгрии, Чехии, Словакии, Болгарии, Румынии)	Образование			
	полное среднее более низкое	профессионально-техническое	среднее специальное и незаконченное высшее	высшее
защитят от нелегалов	5,0	2,2	11,2	16,9
приведут к дефициту рабочей силы	55,7	38,2	30,4	18,6
Приведут к трудностям в сбыте товаров собственного производства	6,5	7,9	12,0	21,0
ничего не изменится	15,7	18,0	23,2	17,7
трудно сказать	17,1	33,7	23,2	25,8

Ориентированность внешних трудовых мигрантов на переселение на постоянное место жительства за рубеж

Между ориентированностью на работу за рубежом и на переселение на постоянное место жительства за рубеж существует прямая, хотя и не четко выраженная взаимосвязь. Наличие такой взаимосвязи должно быть оценено отрицательно. Российские исследователи и управленцы [9, с.19], оценивая как неизбежную и вполне нормальную работу российских граждан за рубежом, все же считают, что такая работа не должна приводить к переселению на постоянное место жительства; с этой целью должны быть обеспечены социальные гарантии внешним трудовым мигрантам из России (зачет трудового стажа, страхование и т.д.) и созданы условия для сохранения и использования заработков на территории России.

На постоянное проживание за границу хотело бы выехать 23,8% внешних трудовых мигрантов¹ (из Черновцов – 48,6%, из Киева – 23,3%, из Прилбыч – 10,2%). Из общего числа планирующих переселиться за рубеж на переселение в США, Канаду было ориентировано 30%, в Германию – 23%, в Италию, Испанию, Грецию – 16%, в Великобританию – 8%. В США и Канаду имело намерение переселиться 42,8% ориентированных на переселение за рубеж внешних трудовых мигрантов из Прилбыч, 36,4% - из Черновцов, 18,4% - из Киева. Больше одной трети

¹ Полученные данные подтверждают преобладающий вывод, что четвертая часть с работающих за границей украинских трудовых мигрантов „остается там навсегда” [10]. В районах с высокой интенсивностью внешней трудовой миграции желание выехать на постоянное место жительства за рубеж выявляют даже дети. В частности, выезд за границу как свою наибольшую мечту назвало в сочинении больше половины восьмиклассников в одной из обыкновенных школ Тернопольской области [11].

(34,6%) планирующих переселиться за рубеж внешних трудовых мигрантов из Черновцов хотело бы переселиться в Германию. Значимо большей была доля желающих переселиться на постоянное место жительства в Австралию и Новую Зеландию в составе ориентированных на переселение за рубеж внешних трудовых мигрантов из Черновцов и из Прилбыч.

Удельный вес мужчин (53,3%) в составе планировавших выехать на постоянное место жительства за рубеж был меньшим чем в составе не имевших намерения выезжать на постоянное место жительства за рубеж (62,6%). Средний возраст ориентированных на переселение на постоянное место жительства за рубеж (36,51 года) был лишь незначительно меньшим не намеренных переселиться на постоянное место жительства за рубеж внешних трудовых мигрантов (36,85 года). Среди ориентированных на переселение на постоянное место жительства за рубеж внешних трудовых мигрантов на долю молодежи (до 30 лет) приходилось 29,9%, лиц зрелого возраста (30-49 лет) – 58,9%, лиц старшего возраста (50-64 года) – 11,2%. По сравнению с возрастной структурой не намеренных переселяться на постоянное место жительства за рубеж внешних трудовых мигрантов в возрастной структуре внешних трудовых мигрантов с положительной установкой на переселение на постоянное место жительства за рубеж ощутимо большим (в 1,4 раза) был удельный вес 30-34 летних (значимо меньшим – удельный вес 35-39 летних (в 1,31 раза), 55-59 летних (в 1,25 раза) и 50-54 летних (в 1,21 раза) (рис. 4).



В структуре ориентированных на переселение на постоянное место жительства за рубеж внешних трудовых мигрантов старшего возраста две трети хотели бы переселиться в США, Канаду, Германию. Доли желающих переселиться на постоянное место жительства в эти страны в структуре ориентированных на переселение за рубеж внешних трудовых мигрантов зрелого и молодого возраста были меньшими (соответственно 49% и 45,4%). Ориентированность на переселение в Италию, Испанию, Грецию желающих переселиться на постоянное место жительства за рубеж внешних трудовых мигрантов зрелого возраста была большей чем молодого и старшего возраста (рис. 5).



Среди желающих переселиться на постоянное место жительства за границу преобладали состоящие в браке (52,3%); на доли холостых (незамужних) и разведенных приходилось соответственно 23,4% и 15,9%. По сравнению с не намеренными переселиться на постоянное место жительства за рубеж в структуре ориентированных на переселение на постоянное место жительства за рубеж большими были доли вдовых (в 2,76 раза), состоящих в гражданском (незарегистрированном) браке (в 2,46 раза), разведенных (в 1,94 раза), холостых (незамужних) (в 1,13 раза).

Материалы обследования подтвердили вывод, что на переселение на постоянное место жительства за рубеж ориентируются прежде всего не имеющие занятия в Украине. Не имеющие занятия по месту жительства (47,6%) преобладали в структуре ориентированных на переселение на постоянное место жительства за рубеж. Из числа планирующих переселиться на постоянное место за рубеж на частных предприятиях и фирмах в Украине было занято 17,1%, на государственных предприятиях в Украине — 15,2%. Существенно больше ориентированными на

переселение на постоянное место жительства среди выделенных на основе занятия по месту жительства в Украине групп внешних трудовых мигрантов были студенты и школьники, безработные. Очень низкой была ориентация на переселение на постоянное место жительства за рубеж внешних трудовых мигрантов, получающих пенсию в Украине. Низкой была она (ориентированность) и у работавших на государственных (кооперативных) предприятиях в Украине.

Из числа анализируемых профессиональных групп внешних трудовых мигрантов наиболее ориентированными на переселение на постоянное место жительства за рубеж были торговые работники, повара, официанты; бухгалтера, экономисты; работники строительных специальностей. В их составе удельный вес желающих переселиться на постоянное место жительства за рубеж был большим 32%. На общем фоне низкими были значения долей желающих переселиться на постоянное место жительства внешних трудовых мигрантов таких профессиональных групп как водители (7,5%), рабочие, разнорабочие, уборщицы, без специальности (10%). В остальных профессиональных группах внешних трудовых мигрантов значение данного показателя варьировало в пределах 23,5%-28,6% (рис. 6).

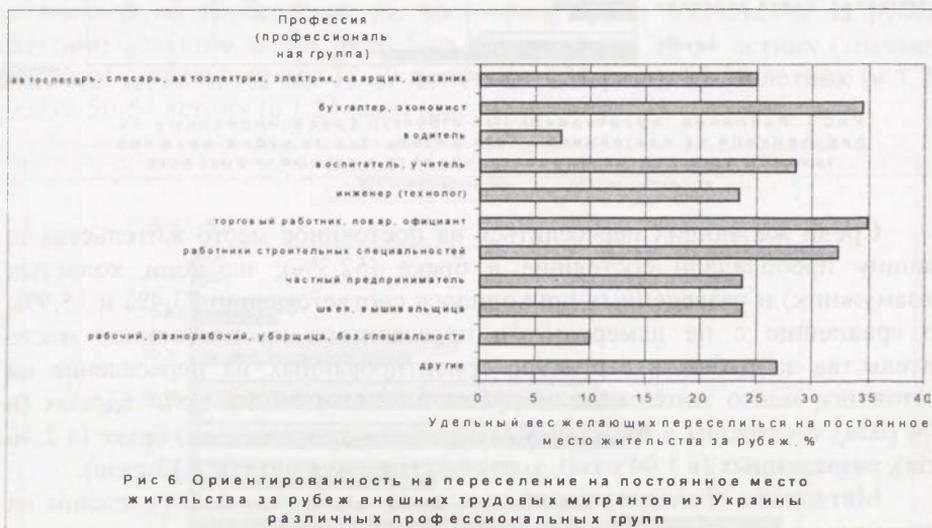


Рис 6 Ориентированность на переселение на постоянное место жительства за рубеж внешних трудовых мигрантов из Украины различных профессиональных групп

Уровень образования желающих переселиться на постоянное место жительства за рубеж внешних трудовых мигрантов из Украины (12,44 года обучения) был большим чем среди не изъявивших такого желания (11,83 года обучения). На переселение на постоянное место жительства за рубеж наиболее ориентированными были внешние трудовые мигранты с высшим

и незаконченным высшим образованием. В их составе удельный вес желающих переселиться на постоянное место жительства за рубеж был равен соответственно 33% и 31,3%. Значение данного показателя у внешних трудовых мигрантов с более низким образованием было существенно меньшим (с профессионально-техническим – 17,1%, с неполным средним и более низким – 18,2%, со средним специальным – 20,5%, с полным средним – 21%). Наиболее высоким уровнем образования характеризовались желающие переселиться на постоянное место жительства в Австралию, Новую Зеландию (13,8 года обучения), Польшу, Чехию, Венгрию (13,6 года обучения), Великобританию (13,5 года обучения). Уровень образования ориентированных на переселение на постоянное место жительства в Италию, Испанию, Грецию (11,94 года обучения) и Германию (11,96 года обучения) был меньшим. Близким к среднему значению по всему массиву желающих переселиться на постоянное место жительства за рубеж внешних трудовых мигрантов из Украины был уровень образования желающих переселиться на постоянное место жительства в США, Канаду (12,77 года обучения) и в другие страны (13,08 года обучения).

Среди ориентированных на переселение на постоянное место жительства за рубеж внешних трудовых мигрантов из Украины удельный вес не желающих, что стали выезжать на работу в другие страны (86,9%), был несколько большим чем среди не имеющих намерения переселиться на постоянное место жительства за рубеж (83,9%). У желающих переселиться на постоянное место жительства за рубеж по сравнению с не желающими этого внешними трудовыми мигрантами удовлетворенность заработками за границей была более дифференцированной. В их составе доли вполне удовлетворенных и совсем не удовлетворенных заработками за границей были ощутимо большими (соответственно в 2,43 раза и в 1,49 раза), а доля не совсем удовлетворенных – значимо меньшей (в 1,7 раза). К формированию положительной установки на переселение за рубеж ведет не неудовлетворенность „мигрантским” образом жизни, как то предполагалось, а именно удовлетворенность им („мигрантским” образом жизни). Если среди планирующих переселиться на постоянное место жительства за рубеж удельный вес удовлетворенных „мигрантским” образом жизни был равен 13,1% (совсем неудовлетворенных – 26,3%), то среди не намеренных переселиться на постоянное место жительства за рубеж – 3,8% (35,8%).

Средняя длительность пребывания за рубежом ориентированных на переселение на постоянное место жительства за рубеж внешних трудовых мигрантов из Украины была в 2,4 раза большей чем не планировавших переселяться на постоянное место жительства за рубеж. Если в структуре выразивших намерение переселиться на постоянное место жительства за

границу удельный вес пребывавших за рубежом более 186 дней составлял 48,6%, то в структуре не выразивших такого намерения – 21%. Правда, среди ориентированных на переселение на постоянное место жительства за рубеж доля пребывавших за рубежом 7 дней и менее (14%) была несколько меньшей чем среди внешних трудовых мигрантов из Украины с отрицательной установкой на переселение на постоянное место жительства за рубеж (12,4%).

Миграционные законы в Украине, разработанные в значительной мере по западноевропейским образцам, выражали и еще и теперь выражают скорее стремление адаптировать законодательство Украины по этим вопросам требованиям Европейского Союза перед вступлением в это региональное объединение чем серьезно подойти к решению назревших вопросов управления миграцией. Об этом свидетельствует хотя бы уже то, что позволяющие ввести в действие нормы законов необходимые подзаконные акты разрабатываются с опозданием, а некоторые из них выходят за пределы допустимой в процессе осуществления положений законов модификации и даже вступают в противоречие с ними. В составе внешней (международной) миграции Украины преобладает трудовая миграция. К сожалению, все разрозненные действия государственных структур и общественных организаций в 90-е годы XX века – начале XXI века были связаны в основном с вынужденной (беженцы) и нелегальной транзитной миграцией. Время внести коррективы в механизм управления внешними миграциями уже настало.

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Summary

LABOUR MIGRATION FROM UKRAINE: EXPECTED CHANGES AFTER THE EUROPEAN UNION’S ENLARGEMENT

Whereas the majority population of the Ukraine leaves to work in other countries illegal or half-legal, it’s very difficult to define the quantity of Ukrainian labor migrants. An average quantity of them values in 5-7 million of people, on other data about 8-9 million people. It’s known that the data about Ukrainian labor migrants is set too high. The most set too high estimation of quantity of external Ukrainian labor migrants to the countries of old members of EU. According to our approximate calculations (including tourists), the quantity of external Ukrainian labor migrants to this countries in 2002 amounted 72,8 thousand people, varying in 1996-2002 from 55,6 thousand people in 2001 to 73,3 thousand people in 1997. It’s expected that expansion of EU in nearest time will bring to decreasing the volume of external Ukrainian labor migrants because of harder boundary routine and wrestling co-ordination with illegal or half-legal labor migration in this region. In most measure after expansion of EU, the dilemma “to go on migration in tradition countries or reorient on another ones” will concern labor migrants. According to sociological survey “Socio-economic signification of labor migration of Ukrainians” (are brought descriptions and opinions of 463 external labor mi-

grants), which took place in Kiev, Chernivtsi, Prylbychi Yavorivsky rayon Lviv oblast there were determined main plans of external labor migrants in point of future trips for working abroad, influence on them expansion of EU, directivity of external labor migrants on emigration (domicile abroad). Significant attention spared to estimations of possible future consequences, after entering the visas for Ukrainian citizens by CE as for Ukraine, so and for countries of CE (Poland, Hungary, Czech Republic, Slovakia, Bulgaria, and Romania). Till nowadays, there were spared little attention to regulation of external labor migration; while the most attention spared to refugees problems and transit illegal migrants. The task of increasing of external labor migration from Ukraine practically can't be solved without introduction new approaches to it's regulation from state side.

EASTERN POLICY OF EUROPEAN UNION AND UKRAINE

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Development of the EU-Ukraine relationships could be divided into several stages. The first one spans 1992 through 1994, when relationships were basically of trade nature and were grounded on bilateral agreement between the EU and Ukraine on Propagation of the Agreement on Trade and Cooperation between the EU and the USSR (December 1989) on Ukraine, as well as on other post-Soviet countries. The second stage lasted from signing the Partnership and Cooperation Agreement between the EU and Ukraine (PCA) in Luxembourg, June 16, 1994, till adoption of the European Council Common Strategy on Ukraine during the European Council Summit in Helsinki, December 10-11, 1999. Main provisions of this document determined features of the third stage of mutual cooperation, that spans period from 2000 till 2003. The tasks of the on-going fourth stage will be determined by the document called "Wider Europe", which was prepared by the European Commission and submitted to the European Council and European Parliament on March 11, 1993. But for all that only the Agreement of 1994 could be considered to be a document that created qualitatively new conditions for mutual cooperation.

Virtually until recently the mechanism of cooperation has been determined by provisions of PCA 1994. "The legal basis of the relationships between the EU and Ukraine is the Partnership and Cooperation Agreement" stated in the Common Strategy of 1999 (Article 7)¹, which itself did not introduce any substantial changes to the existing mechanism, except emphasising several new, mainly geopolitical, tasks. In this respect it is worthwhile to analyse main provisions of PCA 1994, which established the nature of partners' relationships for the whole period 1994-2003.

The Agreement, consisting of 109 articles and 5 appendices, shaped major directions of mutual cooperation in the field of politics and economics, including industry, agriculture, investment, finance, social policy, regional development, culture, etc. The partners granted each other with the Most Favourite

Nation (MFN) Status, as well as with National Status for setting tax rates and other duties on imported goods traded at market prices (Article 17). Both countries committed themselves to give companies from the EU or Ukraine a possibility to operate under National Status or Most Favourite Nation Status (Article 30). Article 8 obliged conducting settlements concerning movement of goods, services and individuals between residents of both partner-countries only in hard currency. The Agreement envisaged the cooperation in the field of intellectual property protection, non-restriction of competition, encouragement and protection of investment, etc. The EU undertook responsibility to provide Ukraine with technical support in legislation, personnel training, social sphere and other fields, including the TACIS program, which provides technical support to the CIS countries.

Article 14 of the Agreement envisaged elimination of quantitative restrictions on imports, which according to Articles 21 and 22 were reserved only on delivery to the EU of textile and ferrous metal products. In some directions of cooperation a principle of rights disparity in favour of Ukraine was used. For instance, according to Article 48, Ukraine was allowed to unilaterally introduce currency restrictions. Ukraine was also eligible for the majority of privileges granted by the EU to developing countries in the framework of the General System of Preferences.

Ukraine was first among the CIS countries that signed the Agreement on Partnership and Cooperation with the EU. This fact, in our opinion, should have underlined peculiar nature of EU-Ukraine relationships (similar agreement with Russia was signed four days later, on June 4, 1994 followed by the same legal acts with other post-soviet countries). Lengthy procedure of approval of all treaties with non-EU-countries by parliaments of all EU members (as a result, PCA with Ukraine fully came into effect on March 1, 1998) forced the Council of Ministers of the European Union to adopt the Interim Agreement on Trade and Trade Issues on December 4, 1995. According to the documents, partners received a right to get use of PCA 1994 provisions in their mutual relationships.

A course towards integration to the EU is a conceptual geopolitical imperative of national-democratic parties and political leadership of Ukraine. Even before Ukraine got independence, the Declaration of State Sovereignty (July 16, 1990) had set a task of direct participation "in the all-European process and in European organizations" (Article 9 of the Declaration)². On July 2, 1993 in the Main Directions of Military Policy of Ukraine Verkhovna Rada declared a principle of multi-direction / multi-vector policy (многовекторность) in Ukraine's relationships with East and West. Despite its conceptually conflicting nature, this document, that was a result of a compromise between supporters of political orientation towards Russia and those advocating for Euro-Atlantic organizations, emphasised necessity to develop relationships with the EU as one of the policy vectors (it is worthwhile to note that since 2002 the Minister of Foreign

Affairs, Anatoliy Zlenko, has repeatedly stated about diversion from multi-vector principle and acceptance of dominant policy towards European integration).

After signing PCA 1994, the political leadership of Ukraine became especially attentive to institutional aspect of relationships with the EU. On July 11, 1998 the President of Ukraine, Leonid Kuchma, signed a decree on adoption of the Strategy of Ukraine's Integration to the European Union, which "determines main priorities in the activity of executive power agencies for the period till 2007, throughout which prerequisites necessary for Ukraine to become a full EU-member are to be created" (preamble to the document)³. A task to receive an associated member status was determined as a main priority of foreign policy in the middle-term. The Cabinet of Ministers was assigned to be responsible for implementation of the Strategy, while coordination of activity of different Ministries became a task of the National Agency of Ukraine on Development and European integration (created on February 24, 1998 according to the Presidential Decree). The Agency was liquidated in December 1999 because of reorganization of the government structure, but coordinating functions were assigned to the Ministry of Economy and European Integration.

Institutional forms of cooperation with the EU are being perfected now. On January 30, 2003 President Leonid Kuchma signed a Decree that ratifies the Statute on State Council on European and Euro-Atlantic Integration of Ukraine. The aim to establish this new institution is to coordinate activities "intended for realization of strategic targets of the state policy allowing integration of Ukraine into European political, economic, security and legislative areas; creation of conditions, under which Ukraine gets membership in European Union (EU) and NATO; increase in efficiency of state authorities control over the sphere of European and Euro-Atlantic integration"⁴. Previous experience showed that institutions with purely coordinative functions (HAYPEH in 1998-99 or Commissioner of Ukraine in European integration in 2001-02) are not quite effective in uniting the efforts of ministers and other state authorities in solving the whole array of integration problems. Therefore, the President of Ukraine as the Head of executive power has led the State Council. The Decree on its establishment envisages recommendations, but also ministers' as well as other central and local authorities' obligation to carry out Councils' decisions. Moreover, it foresees systematic control (estimation) of results of their activities in the respective sphere. Appointment of M. Azarov, the first Prime-Minister and Minister of Finance as the Commissioner of Ukraine in European and Euro-Atlantic integration (the Decree of the President on February 26, 2003) should also contribute to intensification of coordination at the ministerial level⁵. It is characteristic that at the same time the National Center on Euro-Atlantic Integration of Ukraine headed by the V. Gorbulin, the President's assistant on national security, was established (the Decree of the President on February 12,

2003). However, this Center is only consulting institution under the President of Ukraine, and its activity is limited by coordinative function and development of proposals regarding further co-operation with the NATO⁶.

Since 1994 the European Union has conducted a series of important steps towards development of relations with Ukraine. According to the Article 85 of the Agreement on Partnership and Co-operation, the Council of EU-Ukraine Co-operation was established (its sixth meeting took place in March 2003 in Brussels, although according to the referred article there had to be annual meetings). In November 1994 the EU adopted "Common Position on Ukraine", in May 1996 – "The Joint Statement of the European Union Concerning Ukraine", and in December 1996 the Council of Ministers of the EU passed "Action Plan" concerning Ukraine. The adoption of "Common Strategy of the EU Concerning Ukraine", passed by the European Council on December 10-11, 1999 in Helsinki had a special importance for determination of the EU position. Even more clearly the European Commission presented this position in the document entitled "Wider Europe" disseminated on March 11, 2003. The document defined the policy of the EU towards its east and south neighbors, and Ukraine was positioned as so called "western new independent state" (WNIS) together with Belarus and Moldova.

The complete evaluation of importance of the document in the framework of the EU-Ukraine relations requires more detailed investigation of concepts and realities of their previous co-operation.

We think that despite all changes in differentiated approach of the EU towards integration-targeted co-operation with different groups of European states that have been accepted since end 80th, the basic principle of their relations have been defined in the concept of "concentric circles" by E. Balladur. According to this concept, the first three circles constitutes the EU countries per se, EACT countries and the states of the Central and Eastern Europe that are in association with the EU (Poland, Hungary, Estonia, etc.). By this concept, other European states, including Ukraine, belongs to the fourth circle, so institutionally they will get only "gradual intensification of participation in common European co-operation"⁷.

Taking into account this concept, we can state that during the summit in Helsinki in December 1999, when the EU candidates were defined, the compact structure of the common European economic space was also established. Its borders did not include (it's obvious, temporarily) Albania and former Republics of Yugoslavia, excluding Slovenia that was considered as one of the most preferable candidates to the EU. (It is necessary to mention that in the document "Wider Europe" published in 2003 these countries have the reserved right for the EU integration, so they are strongly differentiated from the Russian Federation, the WNIS and the South Mediterranean Countries). The summit in Helsinki envisaged several waves of new members' entries, but that was changed

during the conference in Athena on April 17, 2003. As it is known, during the latter conference the EU agreed to already accept 10 new members by May 1, 2003. The question concerning Bulgaria and Romania was postponed till 2007. The question of Ukraine's integration, as well as integration of other former Soviet republics (so called new independent states), excluding three Baltic countries, virtually has not been discussed. Together with the South Mediterranean Countries (participants of the so called Barcelona process) they get a status of "neighboring countries" in line with the "Wider Europe" concept.

It should be noted that the concept of "neighboring countries" in the EU is not the new development. It has been discussed in the EU for quite a long time. Concerning this issue it is enough to refer to, for instance, elaborations by Bertelsmann Foundation researchers that in the year 2000 grounded the major positions of the "direct neighborhood" model at the external EU borders after its enlargement. It is characteristic that members of the investigation team I. Kempe and W. van Meurs distinguished "southern" and "eastern" regions of this "neighborhood"⁸ that was completely utilized by the European Commission in their concept "Wider Europe" three years later.

Decisions of Athena conference clearly confirm the basic difference in strategic approaches of the EU towards the future of the Central and Eastern European countries and former Soviet new independent states that have been stipulated in the first half of the 90th. These differences have been envisaged in the basic documents that regulate the relations with these two groups of countries – in the European agreements of association for Hungary, Bulgaria, and Baltic countries, etc. on the one hand, and for Ukraine, Russia and other CIS countries on the other. For example, "The European Agreement on establishment of association between European communities, as well as its countries-members and the Republic of Poland" signed on December 16, 1991 (similar agreements of the EU with other countries have almost identical text) is a detailed document with precise terms concerning movement towards the EU membership (this possibility is explicitly defined in the preamble of the agreement), as well as rights and obligations of parties regarding this process. The performance of tasks, recorded in the Agreement, had two stages with intermediate evaluation of the "the progress of the Poland towards introduction of market economy" (Article 6) done by the Council of Association⁹. We believe that this provision, included in other European agreements as well, had a special role as an important external stimulus for economic reforms in the Central and Eastern Europe countries.

The Agreement on Partnership and Co-operation did not include a provision on possibility of Ukraine's integration into the EU. The basic intention of parties to establish and develop the co-operation did not go beyond listing its major directions without dates and exact activities. Both types of documents have fairly similar chapters on political dialog, while major differences are in

chapters dedicated to economic and institutional aspects of co-operation. If the Council of Association, according to the European agreements, has control functions, the Council of Co-operation between the EU and Ukraine, according to the Agreement on Partnership and Co-operation, can only develop recommendations for partners (Article 85 of the Agreement on Partnership and Co-operation). The differences in legal statuses of trade relations between partners defined by the documents are very typical. Chapter III of the Association Agreement is entitled "Free movement of goods" that immediately allowed the countries for gradual establishment of the free trade regime with the EU. The respective Chapter III in the Agreement on Partnership and Co-operation has other name - "Trade of goods" under the most favorable regime. As of the free trade zone, Article 4 of the Agreement on Partnership and Co-operation envisaged that negotiations would start not earlier than 1998. Referring to the slow path of economic reforms and difficulties with economic recovery of Ukraine, the EU still has not agreed to solve this problem (it is necessary to mention that in the last three years the crisis phenomena in the Ukrainian economy were stopped, and the real GDP growth was between 4.1% and 9.2% annually)¹⁰.

Significant difference between the documents is also in conditions of investment co-operation, companies' establishment, and industrial relations, etc. that are more favorable for the Central and Eastern European countries considering their future EU integration, than for Ukraine.

Of course, we should take into account the negative impact on integration image of Ukraine made by almost a decade of economic crises, by inconsistency of many internal indicators with "Copenhagen criteria" of the EU accession (including development of financial sector, the share of small and medium enterprises, etc.), by slow progress in the WTO accession and so on. However, we should emphasize that in the first half of the 90th a lot of Central and Eastern European countries had the same or even worse indicators of internal economic and political development. However, they managed to enter into association with the EU, while Ukraine still cannot reach this point, including such preliminary stage as an establishment of free trade zone with the EU.

The concept "Wider Europe" has one positive feature. It brings certainty about the EU position concerning Ukraine. In the first chapter of this document it is clearly stated that its provisions are relevant for all neighboring countries (including Ukraine) that "do not have the perspective of membership of the EU"¹¹. Thus these countries have to head for new format of cooperation with EU, which does not presume their immediate integration into single integrated economic space of Europe but envisages broadening and deepening of cooperation with enlarged economic grouping consisting of 15 members.

New conditions have not changed strategic goals of Ukraine's leadership to join EU but have changed somehow the assessment of tactical priorities in the field. Conceptually the modern attitude towards cooperation with EU can be

described by three theses formulated by President L. Kuchma in his speech at Summit in Athens. The first one is a confirmation of "strategic goal to get full-fledged EU membership in the long run." In this relation President Kuchma expressed request "to get confirmation of the fact that non-discussion of membership issues today does not mean that this issues will never appear in the agenda". The second thesis referred to the tactical problems: "Kiev is not interested in forcing discussion of EU membership. For us WTO accession is much important today, as well as harmonization of domestic legislation with EU standards". And, finally, the third issue was in fact an assessment of "Broader Europe" concept: "We especially like the combination of comprehensive and individual approaches as a key fundamentals of the concept."¹²

In other words Ukrainian leadership hopes that differentiated Eastern policy of the EU will promote implementation the thesis on "unique position in Europe location of Ukraine in Europe" which "makes it a determinant regional actor" formulated in "Strategic Concept of EU regarding Ukraine" as of 1999. In this respect special importance is attached to EU support and assistance of joint efforts of Ukraine. Poland, Slovakia and Hungary aimed at transforming the region (on both sides of the new eastern border) into zone of active cooperation between European and Eurasian geoeconomic and geopolitical spaces.

Of course, practical steps aimed at broadening and deepening cooperation between EU and Ukraine will be embodied in more comprehensive and specific documents in the nearest future, including Action Plan to be elaborated according to Wider Europe concept. At the same time even the initial analysis of this concept allows to define certain major directions of mutual cooperation in the long run perspective with special focus on the development of relations with new EU members.

The following problems to be solved according Wider Europe concept t can be named. It refers, first of all, support to Ukraine's WTO accession granting Ukraine market economy status, solving long-protracted issues of establishing free trade area and association with EU. For Ukraine with its low level of foreign investments (according to Derzhkomstat data Ukraine managed to attract only 111 US dollar of FDI per capita, as of 1 January 2003) new source of funds from European Investment Bank could have specific importance. On March 18 2003 EU and Ukraine signed bilateral protocol on mutual access to the markets of goods and services. This fact can be seen as the first steps within the framework of the "prospect of a stake in the EU's internal market and further integration and liberalization to promote the free movement of persons, goods, services and capital (four freedoms)". To solve all these problems successfully will be only in case of coordination and active support rendered by new EU members to Ukraine.

Such a coordination will be much more important in the field of transborder cooperation with Ukraine and mutual participation in transeuropean trans-

portation, scientific, ecological and other projects. Wider Europe concept envisages “the possibility of creating a new neighborhood instrument which builds on the positive experiences of promoting cross-border cooperation within Phare, Tacis and INTERREG programmes.”

Larger technical and financial assistance from UE side can be channeled, first of all, towards support of coordination of social and economic development of neighboring territories on both sides of new eastern border (including further development of Karpathy and Bug euroregions), development of transborder infrastructure in order to improve servicing passengers and cargoes as well as preventing infiltration of illegal migrants and terrorists to Europe, etc.

EU and its members have already accumulated experience of cooperation with neighboring countries along the former border of the EU. This experience (mutual links of Polish-German Euroregions like Pomerania, Pro Europa Viadrina and others, introduction of simplified procedure of crossing border with FRG and Poland by the residents of neighboring areas since November 1992 (so-called “small cross-border movement” regime)) can be of great importance in solving the problems mentioned earlier. Joining transborder cooperation within INTERREG program has also some analogies. For example, INTERREG-III until 2006 envisages financing construction of objects located on external contours of EU like Italian-Swiss (74,4 mn euros from Structural Fund and 25,6 mn euros from local fund), Swedish-Norwegian contours (32,0 and 111,0 mn euros respectively), and etc.¹⁴

More proactive EU support may strongly promote acceleration of commissioning Odessa-Brody-Gdansk pipeline system, transit “Cretan” corridors Nose 3,5,7,9, which will improve transportation not only between Ukraine and new EU members but will contribute to the development of intercontinental Europe-Asia transportation axis. (TRACECA and INOGATE programmes haven’t been contributed significantly to solve this problem). One cannot reject possibility of EU participation in Ukrainian-Russian-German gas consortium – at the moment EBRR has expressed its interest in the project, later EIB can do the same.

At the end it is necessary to pay attention to one provisions of the Wider Europe concept, which is extremely important for moving relations between Ukraine and neighboring new EU members to the new level. This document envisages elaboration of the Action Plan not only on bilateral level but does not exclude possibility to elaborate regional Action Plans. This approach can contribute to the creation of coherent zone of coordinated interaction – “Ukraine-Eastern Region of Enlarged Europe”, taking into account participation of Ukraine in international arrangements where CEE countries are not members (CIS, Black Sea Economic Cooperation Organization, etc.) as well as specific features of relations among the countries of this zone in contrast to Mediterranean, Russian and other vectors of EU external contacts.

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Streszczenie

POLITYKA WSCHODNIA UNII EUROPEJSKIEJ A UKRAINA

W artykule podjęto problem trzech etapów współpracy pomiędzy Ukrainą i Unią Europejską (1992-1994, 1994-1999, 1999-2003). Następnie dokonano analizy porównawczej krajów Europy Środkowej i Ukrainy. Możemy stwierdzić, że w znacznej mierze Ukraina nie skorzystała, w sensie geopolitycznym, z Umowy o partnerstwie i współpracy z 1994 r. Wskazano, że aktualnie w Europie tworzy się nowy model polityki kontynentalnej na podstawie koncepcji "Wider Europe" (dokument UE z marca br.). W związku z tym zwrócono uwagę na rolę Ukrainy, jako ważnego elementu nowo kształtującej się geoeconomicznej architektury Europy.

INTERREGIONAL INTEGRATIONAL STRATEGY OF UKRAINE IN A CONTEXT OF THE EU EXPANSION

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The expansion of the EU is a unique opportunity to integrate the countries of the European continent by distribution of stability and prosperity zones on the new country-members.

It is supposed, that beginning from 2004 Ukraine will have direct border with three EU country-members, and from 2007 – with four; that is in the long term all western border will represent an almost continuous strip of Ukraine's bordering with the EU. It can become both the zone of opposition, and the territory of fast social economic increase.

The border itself is a barrier: formally legal; infrastructure; physic-geographical (orographical, hydrographic and ecological); economic; psychological [4], and also geopolitical. But at the same time it can be the factor of integration at the certain level of its openness.

The threats of non-alignment of Ukraine to the European structures have the ground in implementation of alternative undesirable both from political, and from the economic point of view scenarios of geopolitical orientation. First of all it concerns joining the Euro-Asian association.

Therefore, the important factor of regional European integrational strategy of Ukraine is the geopolitical one. Taking into account the geopolitical and geo-economic situation of Ukraine, it can play the important role in interaction of European, Euro-Asian, Asian-Pacific economic groupings, carrying out function of economic "bridge".

In modern conditions Ukraine is not able to be considered as such a bridge yet, as: there is a border, crossing of which requires a lot of time for the population, for motor transport, overcoming of obstacles for railway transport (difference in width of a railway tracks), not enough developed transport, financial infrastructure etc.

For Ukraine of a consequences of EU's expansion can be both positive, and negative.

The advantages of EU expansion can be possible improvement of trade regime, access of the Ukrainian goods and services to the country-members'

markets. This is connected to the automatically distributed action of the Partnership and Cooperation Agreement Ukraine – EU for these countries, which behind a level of mutual trade liberalization comes near to WTO norms.

Besides, the EU's external customs tariff is lower than national tariffs of the countries, which are due to the EU. They should refuse from some quantitative restrictions of Ukraine's import. It is necessary to consider, that in the countries-applicants there will be introduced a uniform transit regime, civilized customs, which will reduce losses of Ukraine from goods smuggling and customs infringements.

For Ukraine consequences of EU expansion can be also negative. They can be the following:

- reduction of trade flows (relative reduction of export and import), that can result in deterioration of trade balance;
- decrease of export on the EU market, which can affect the export prices of the Ukrainian manufacturers and reduction of import, therefore the conditions of trade will worsen.

The countries- candidates are deficient in trade with the EU, which in 2000 made 33 bill. Euro [3]. It means, that these countries will try to expand export on the EU market. It is possible to expect the aggravation of competition between the Ukrainian manufacturers and manufacturers of countries-candidates on those commodity markets, where Ukraine has competitive advantages (electrical equipment, power machines and equipment, clothes and accessories, furniture, black metallurgy).

It is necessary to take into account the incompatibility of EU's and Ukraine's foreign trade structures, which after EU expansion can amplify. This is linked to peculiarities of national manufacture structure and its low competitiveness.

Besides, not being the WTO member, Ukraine can not counteract possible application of anti dumping measures from the new EU members.

Expansion of the Shengen zone to the east, the introduction of visa regime with Poland, Hungary, Slovakia, Czech Republic will result in change of migration policy and in problems for small and medium-size business.

In such conditions the important factor of Ukraine's involvement into processes of the European integration is enforcement of border regions' economic integration. The examples of such integration are regions along the German-Polish border between Dresden and Wroslaw, territory between Prague and Nuremberg, between Trieste and Lublyana. This is due to the importance of such regions maintenance of geo-strategic interests in the integrated Europe. And for Ukraine they will play an essential role in maintenance of its international cooperation development.

With expansion of the EU the contact function of border is amplified. At the same time there is a number of problems, which interfere with this func-

tion's performance. First of all they are connected to a low level of boundary infrastructure's development (insufficient quantity of boundary transit points, in particular for pedestrians, customs items etc.).

Neighborhood with the developing countries, which Ukraine will receive as a result of the EU's expansion, will create for cross-border regions, on one hand, certain economic advantages, and on the other – a lot of problems connected with competitiveness of not only local, but also national manufacture, cross-border migration, struggle with smuggling, protection of an environment.

In strategy of Ukraine's European integration the role of advanced posts, important link of the international economic cooperation is given to boundary regions. The development of foreign economic relations of these regions should compensate their remoteness from the main economic centers of the country. Such communications form the basis for the development of interregional and cross-border cooperation. Cross-border communication appear in politics, economy, environment protection, culture, education, demographic regulation within certain cross-border space – territory, which covers two or more regions of the boundary states and unites them according to certain geopolitical, social and historical attributes.

The special role in development of interregional cross-border cooperation belongs to geopolitical, historical and ethnic factors. The interregional cooperation is a part of the European political integration process. The process of integration favors gradual reduction of a negative effects of borders, in particular those ones, which existed historically. It favors activation of boundary territories' economic development, search of the complimentary structures of their economy due to the help from the EU; the formal and informal communications between the population from both border parties breaks the barriers created by border.

Such cooperation helps to solve the problems of ecological threats, communications' development, can determine regions' stability and social economic development, their place on the international arena.

Interregional cross-border cooperation is directed towards:

- the decision of the labor market's problems of boundary territories;
- development of professional education;
- development of a transport infrastructure; telecommunications, tourism; sciences; cultures;
- expansion of the trade and economic relations; assistance in development of small and medium-sized business;
- environment protection;
- coordination in formation of development and spatial planning strategy;
- regulation of migration flows, creation of new workplaces, liquidation of unemployment;

- information exchange, in particular concerning environment monitoring; increase of competition of boundary regions;
- transfer of technologies developed on a basis of universities and research institutes' cooperation; students' and scientific employees' exchange.

Interregional cross-border cooperation is supported by the program INTERREG III (2000-2006). Its purpose – “Cross-European cooperation for the sustainable development” - that is the promotion of the international, international and interregional cooperation basically on borders and in boundary areas of the EU. The basic attention is paid to external borders of the EU. The advantage is given cross-border cooperation and aimed on formation of the general approaches to joint spatial development and international strategy. INTERREG III includes also interregional cooperation and transnational cooperation - tab. 1.

Table 1. Types of regional cooperation in the European Union

Type of cooperation		
Boundary	Interregional	Transnational
<ul style="list-style-type: none"> – direct neighbor's cooperation in all directions of existence between regional and local bodies of authority along borders; involvement of all interested organizations; – well-organized, because of old traditions; – internally connected with structure of Association of the European boundary Regions (AEBR) 	<ul style="list-style-type: none"> – cooperation between regional and local bodies of authority, mainly in separate branches of existence; – less organized, as there is a shorter interval of time; – internally connected with structure of Assembly of the European Regions (AER) 	<ul style="list-style-type: none"> – cooperation between regions – large territories; – insufficiently developed from organizational point of view; – requires social approaches from the international organizations (Council of Europe, Northern Council)

Source [7, 15].

The processes of integration penetrate into all spheres of life (politics, economy, culture, environment protection). The integration overcomes political and institutional border, develops the process of region's international cooperation. Regionalization in the context of EU expansions due East will play the important role during the further European integration, reduction of possible negative consequences for Ukraine. The interregional cooperation gets new features.

In the program Europe 2000-plus the purposes of interregional cooperation, are defined, in particular: experience and information exchange, alignment and improvement of life standards, assistance in development of economy and trade, development of an infrastructure, transport and tourism, environment protection, cooperation in spatial planning, scientific, cultural, sports, youth exchange cooperation and other kinds of cooperation.

On interregional level it is necessary to develop the general projects, which should become "the driving force of development" for these regions, to form interregional strategy of spatial development, which provide:

- favorable conditions for urban and village development;
- strengthening of business, development of small and medium-sized business, support of the local employment initiatives;
- adaptation of the labor market;
- attraction of money into education, culture, public health services;
- environment protection, development of power industry and renewed sources of energy;
- development of transport (in particular ecological transport), communications, power systems;
- improvement of cooperation in legal sphere, including improvements of external borders' safety;
- development of spatial strategy for the sustainable economic and social development of boundary territories;
- transfer of technologies, researches, exchange of experience in spatial planning;
- improvement of infrastructural support of boundary territories.

The integration of Ukraine on July 14, 1993 to the European frame convention on the basic principles of cross-border cooperation favored its development between territorial communities and authorities, and also favored interregional cooperation on the basis of Euro-regions' establishment according to multilateral agreements with the neighbor countries.

This is connected the fact, that stimulation of cross-border communications' development quite often results in dissociation, that is in mutual penetration of regions and establishment of common formations (Euro-regions, technological parks, etc.). The basic question, which thus it is necessary to set, whether such association will give additional competitive advantages to boundary territories or possible loss of their previous advantages.

It is necessary to note, that there are differences in Euro-regional structures' establishment in the EU and post-communistic countries. So for Western European countries the ground for their formation is "improvement" of relations between the member-countries, but the objective for Central and East European countries is "restoration" and "expansion" on a new basis of interregional cooperation. But there are common all-European priorities of sustainable development and construction of the Trans-European communication networks.

Euro-regions will play the important role on way of Ukraine's European integration. On April 29, 2002 Ukrainian government accepted the Program of Euro-regions' development, which was worked out with the aim of creation of appropriate conditions for activation of Ukrainian regions' participation in

cross-border cooperation. According to this Program, basic tasks of the further development of Ukrainian Euro-regions are:

- support of mutually advantageous communications with the neighbor countries, countries-candidates and EU member-countries;
- implementation of measures for gradual elimination of obstacles (administrative, legal), that constrain development of cross-border interaction;
- making Ukrainian legislation on the regional cooperation compatible with the international norms;
- granting legal, information, methodical and organizational assistance to local bodies of the executive authority and bodies of local self-management concerning participation in cross-border cooperation and Euro-region's development;
- financing of the appropriate measures from the state budget;
- participation in realization of the projects, which are supported by the foreign states and international organizations;
- favoring attraction of the international technical assistance and financial help from specialized funds of the international organizations.

For the period since 1993 four Euro-regions has been established with Ukrainian participation: "Buh", "Low Danube", "Upper Prut", Carpathian Euro-region. Volynsk, Chernovtsy, Zakarpatye, Odessa, Ivano-Frankivsk and Lviv districts are involved into their functioning from the Ukrainian part, and administrative-territorial units of Poland, Belorussia, Romania, Slovakia, Hungary, Moldavia – from the boundary foreign states part.

Euro-regions are the most effective form of interregional cross-border cooperation. It is based on formation of highest level integrated structures – Euro-region's Council, its Secretary, Working groups, Committees of management, etc. These groups work directly with the specialized regional and international bodies, which coordinate this cooperation.

Table 2. The characteristic of the Pidcarpat'sk voevodstvo and Lviv district

Region	Territory, th. km ²	% of the state	Population, th. people	% of the state	Share of urban population, %	Share of village population, %	Density of the population, persons/km ²
Ukraine	603,7	100	48988,5	100	68,0	32,0	80
Lviv district	21,8	3,6	2693,7	5,5	60,8	39,2	124
Poland	312,7	100	38667,0	100	61,9	38,1	123,7
Pidcarpat'sk voevodstvo	18,6	5,7	2126,0	5,5	41,1	58,9	127,5

As experience of the Carpathian Euro-region functioning shows, its efficiency is insufficient. Therefore there is an offer, supported by the Ukrainian

and Polish parties, to a new Euro-region "Syan" establish on the territory of Pidcarpatsk voevodstvo and Lviv district. These regions have similar climatic and geographical features (tab. 2).

Both regions require structural transformations both in industry, and in an agriculture. Though in Pidcarpatsk voevodstvo the enterprise activity is more advanced (125,5 thousand enterprises compared to 47 thousand in Lviv district).

Western boundary regions can significantly contribute to implementation of Ukraine's integrational strategy:

- To develop Western-Ukrainian system of fuel stations due West. The markets of South-West Poland, East Slovakia, East Hungary and North-West Romania are much closer (up to 500 km) than large consumer centers of Ukraine. Thus Ukraine can liberalize trade in raw material and products of oil processing under the Central European prices.
- To intensify cooperation between Ukraine and Hungary in the field of oil-phen, polyphen and high molecular chemistry production, which is caused by the increased demand for these products in the countries of Central and East Europe. It is important to open goods-pass between Kalush (Ivano-Frankivsk district) and Tisavashvari (East Hungary).
- To supply introduction of the oil-pipeline between the Black sea and Central and East Europe. For realization of this project it is important to establish of consortium from three countries - Ukraine, Russia and Germany. This pipeline will have an important meaning for such oil refining enterprises, as Borza, Zhazhalombata, Tisavashvari, Strazhko, Hlynich, Yaslo, Plosk and others).
- To finish construction of a highway, between South-West Poland and Lviv district, connecting it with Trans-European net.
- To ensure harmonization of a railway communication between Central, East Europe and Ukraine (Lviv district). The project provides continuation of a railway line according to Western standards of width between Mostyska and Lviv. It can become a transport corridor of vital importance as bridge between Ukraine and EU.
- To develop uniting systems between a post Soviet and Central and East Europe systems. The possible two competing projects are: modernization of system connection to a constant current Burshtyn (and parallel, Doprotvir) station towards Slovakia and Hungary, increase of capacity up to 800 MVt with an opportunity of system integration in a single unit. Such decision provides switching-off the Western-Ukrainian network from other part of the country. The second project – connection of two large systems through integration to constant current system. These two decisions require improvement of the Ukrainian network of electric power supply.
- To raise the standards of processing of waste water to the European level in all small and medium-sized cities of Western Ukraine. In the given time ca-

capacity for such processing is not available. Therefore industrial and household drains get to the rivers (Bystrytsya, Dnister, Prut) in enormous amounts without purification. As a result, regions, which are situated down the river banks (Moldavia, Odessa, the Black Sea), are strongly polluted. The introduction of the Central European technologies and standards in Ukraine can be carried out through implementation of the experimental projects in Western region. This region, due to its geopolitical arrangement and natural resources, is very important from the view-point of the minimal ecological standards' support.

- To make tourist infrastructure in Western region, in particular in the Ukrainian Carpathians (national park Yaremche-Vorohta, Truskavets, Skhidnytsya, tourist resort in Slavske) in compliance with European standards. Romania and Poland have tourist centers in the Carpathians recognized on the international level. In Ukraine the existing centers should be reconstructed on the basis of privatization. On same basis it is necessary to create new tourist centers, to develop wider "green tourism".
- To favor an increase of foreign languages knowledge among the experts, working on infrastructure's objects. For example, an obligatory knowledge of two (English and German) languages is required for the personnel of the Ukrainian dispatching center, which should be connected to the Central European electrical system.
- To ensure increase of telecommunication services use from Western Europe. Today Ukraine communicates with the world through a network, which must be set in compliance with international level.

The important role in realization of integrational strategy for Ukraine in the context of EU expansion is given to the regional representatives of authority, their responsibility and "good will", adaptation of regions' economic structures to the international requirements. The important meaning in modern conditions will play the factor of the personal relations.

The significant contribution can bring commercial and industrial chambers, providing the businessmen with the necessary information concerning the opportunities for international, first of all cross-border cooperation.

It is necessary to search new forms of industrial cooperation, common use of an infrastructure, nature use, environment protection, humanitarian cooperation.

The features of Ukrainian geopolitical space are determined by its high transit potential. It can play a role of the transport bridge, connecting important directions of international trade: Europe-Asia, Northern Europe, Near East and countries of Africa. In modern conditions transit services make 80-90% in transport services export. But in transport services' export volume in the world Ukraine's share is only about 1,00 %, while the share of France - 6,01 %; Germany - 5,94 %; the Netherlands - 6,25 %; Denmark - 2,14 %.

Ukraine by its transit potential takes one of the first places in Europe. This determines the necessity of the accelerated development of a transport infrastructure, creation of national network of the international transport corridors, its integration to transport systems of Europe, Asia, Baltic and Black Sea regions.

The important place in Ukrainian economic and social policy strategy for 2000-2005 is given "to the Complex program of the statement of Ukraine as transit state", which provides:

- activation of work on the creation of national network of international transport corridors according to the international standards and its integration in transport systems of Europe, Asia and Baltic and Black Sea regions;
- development of cooperation with the international transport organizations;
- integration of Ukraine to the international conventions and contracts in the field of international transportation;
- simplification of procedures at crossing state border of Ukraine;
- realization of the projects, providing participation of Ukraine in formation of road, transport and boundary infrastructure, introduction of new transport technologies according to EU's requirements.

The important meaning has pipe transport (oil pipeline "Druzhba", that passes through Brody towards Stryj, Zakarpattya and further towards the European countries. There are three automobile carrying items (Shegini, Krakovets, Rava-Ruska) and three railway (Mostyska-2, Khyriv, Rava-Ruska) functioning on the Ukrainian-Polish border. The significant part of transport flow within the direction "East-West" passes through railway and automobile carrying items Yagodyn, Krakovets. Here intensity of motor transport traffic is about 5000 automobiles per day. Possible percentage growth of intensity is by 10-15%.

In Ukraine transit factor, estimated according to the technique of the English institute RENDEL, is the greatest in Europe – 3,75.

European transport corridors №№ 3,5,7,9 are formed on the territory of Ukraine. Each of these corridors covers up to 200 km across the direction of movement and provides existence of not less than two transport types and high-quality information and communication services (tab. 3).

The formation of transport corridors on the territory of Ukraine according to the "Program of creation and functioning of the international transport corridors network" is carried out by reconstruction of existing and construction of new ways of connection.

Table 3. Volumes of cargoes transportation by transport corridors on the territory of Ukraine

Name of the corridor	Cargo transportation. total. mln. ton		including railway				automobile			
			1999		2015		1999		2015	
	1999	2015	mln. ton	%	mln. ton	%	mln. ton	%	mln. ton	%
Corridor № 3	115,9	145,2	99,0	85,4	110,8	76,0	16,9	14,6	34,4	24,0
Corridor № 5	69,5	84,6	62,5	89,9	70,0	83,0	7,0	10,1	14,6	17,0
Corridor № 9	121,4	155,5	97,6	80,4	107,2	69,0	23,8	19,6	48,3	31,0
Corridor Baltic and Black Sea	111,6	140,9	94,2	84,4	103,4	73,0	17,4	15,6	37,5	27,0
Corridor CATK	11,6	44,5	10,0	86,2	38,2	86,0	1,6	13,8	6,3	14,0
Corridor Europe - Asia	253,5	322,4	214,8	84,7	240,4	75,0	38,7	15,3	82,0	25,0
Corridor ЧЕС	201,9	243,5	183,2	90,7	205,2	34,0	18,7	9,3	38,5	16,0

Source: data of Western regional customs.

The important meaning has the construction of a highway Lviv-Krakovets as parts of the international transport corridor of Berlin - Dresden - Wroslaw - Lviv - Kiev. It will be connected to the existing highway M - 06 Kiev - Lviv - Chop.

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Streszczenie

MIĘDZYREGIONALNA STRATEGIA INTEGRACYJNA UKRAINY W KONTEKŚCIE ROZSZERZENIA UE

Rozszerzenie Unii Europejskiej stwarza wyjątkową możliwość zintegrowania krajów europejskiego kontynentu poprzez poszerzenie stref stabilności oraz zdynamizowanie rozwoju nowych krajów członkowskich. Zagrożenie, że Ukraina nie wejdzie do struktur europejskich tkwi w zrealizowaniu alternatywnych, ale nie koniecznych tak z punktu widzenia politycznego jak i ekonomicznego scenariuszy orientacji geopolitycznej.

Wyniki rozszerzenia UE mogą się okazać dla Ukrainy zarówno pozytywne, jak i negatywne. Do zalet rozszerzenia UE można zaliczyć możliwość dostępu ukraińskich towarów i usług na rynki krajów – nowych członków Unii, bowiem w tych krajach automatycznie działać będzie umowa o partnerstwie i współpracy Ukraina – UE, która pod względem poziomu liberalizacji handlu jest zbliżona do norm WTO.

Wraz z powiększeniem Unii Europejskiej wzrasta rola funkcji kontaktowej granicy. Wyjątkową rolę dla rozwoju międzyregionalnej współpracy transgranicznej odgrywają takie czynniki jak geopolityczny, historyczny i etniczny. Na płaszczyźnie międzyregionalnej konieczne jest wypracowanie wspólnych projektów, które winny stać się „lokomotywą rozwoju” danych regionów i tworzyć międzyregionalne strategie przestrzenne.

Stymulacja rozwoju stosunków transgranicznych prowadzi często do tworzenia wspólnych struktur regionalnych: euroregionów i technoparków. Euroregiony odgrywają ważną rolę na drodze Ukrainy do integracji europejskiej. 29 kwietnia 2002 roku rząd Ukrainy przyjął program rozwoju euroregionów, w celu stworzenia odpowiednich warunków dla aktywizacji regionów przygranicznych.

Niezbędne jest poszukiwanie nowych form współpracy, wspólnego wykorzystywania infrastruktury, zasobów naturalnych oraz współpracy humanitarnej. Osobliwość przestrzeni geopolitycznej jest wyznaczona poprzez jej wysoki potencjał tranzytowy, bowiem może ona pełnić rolę pomostu transportowego, który łączy ważne kierunki handlu międzynarodowego: Europa-Azja, Europa Północna-Bliski Wschód oraz kraje afrykańskie.

Pod względem potencjału tranzytowego Ukraina zajmuje jedno z czołowych miejsc w Europie. Uzasadnia to konieczność zdynamizowania rozwoju infrastruktury transportu, ukształtowanie sieci korytarzy transportu międzynarodowego oraz jej integracji z systemami transportu Europy, Azji oraz regionów bałtyckiego i czarnomorskiego.

Ważne miejsce w strategii gospodarczej i polityki społecznej Ukrainy posiada „program rozwoju Ukrainy jako państwa tranzytowego”. Na terytorium Ukrainy są kształtowane europejskie korytarze transportowe nr 3, 5, 7, 9. Każdy z nich zajmuje do 200 km i przewidywane jest funkcjonowanie co najmniej dwóch rodzajów transportu oraz zapewnienie wysokiego poziomu usług, serwisu informacyjnego oraz łączności.

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BANKING		CREDIT		INTERBANKING	
Year	Value	Year	Value	Year	Value
1990	100	1990	100	1990	100
1991	110	1991	110	1991	110
1992	120	1992	120	1992	120
1993	130	1993	130	1993	130
1994	140	1994	140	1994	140
1995	150	1995	150	1995	150
1996	160	1996	160	1996	160
1997	170	1997	170	1997	170
1998	180	1998	180	1998	180
1999	190	1999	190	1999	190
2000	200	2000	200	2000	200

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АКТУАЛЬНЫЕ ВОПРОСЫ РАЗВИТИЯ ЭКОНОМИКИ УКРАИНЫ В КОНТЕКСТЕ ФОРМИРОВАНИЯ ОБЩЕЕВРОПЕЙСКОГО ЭКОНОМИЧЕСКОГО ПРОСТРАНСТВА

Алла МЕЛЬНИК

Тернопольская академия народного хозяйства

Специалисты различают несколько основных этапов в формировании общеевропейского экономического пространства (ОЕЭП): 1) середина XIX века, характеризующаяся отказом Великобритании (1846 г.), а затем и других европейских стран от политики протекционизма во внешней торговле, переходом на позиции фритредерства и либерализации внешнеэкономических отношений в целом, формированием всемирной системы валютных отношений на основе золотомонетного стандарта, либерализацией трансграничной миграции услуг, капиталов и рабочей силы; 2) конец первой мировой войны, октябрьская революция в России 1917 г., подготовка к новой мировой войне, которому свойственны поворот от интеграции и глобализации в Европе к дезинтеграции и автаркизации; 3) конец 40-ых – начало 90-ых годов и по настоящее время, характеризующийся «крахом реального социализма», созданием условий для общеевропейского экономического пространства [1, С.24-25], в котором закономерно может принять участие Украина.

Современный этап формирования общеевропейского экономического пространства характеризуется такими явлениями, как: глобализация и регионализация; развитие «новой экономики», углубление и расширение интеграции, в частности расширение Европейского Союза на восток. В апреле 2003 г. подписан Акт о вступлении в ЭС 10 новых членов – Венгрии, Кипра, Латвии, Литвы, Мальты, Словакии, Словении, Польши, Чехии и Эстонии, предусмотренном на 2004 г. Украине, стратегичной целью которой является полноправное членство в ЕС в долгосрочной перспективе [2], отведен статус соседа. На Европейской конференции «Новое соседство ЭС» (г.Афины, 17.04.2003г.) в контексте принятия новой концепции «Более широкая Европа - соседство» предусмотрено расширение Коммуникации Еврокомиссии на все страны, соседствующие с ЕС, предложены возможности по асимметричному

открытию рынков, создание зоны свободной торговли, распространение всех четырех свобод (свободы движения товаров, свободы движения услуг, свободы движения капиталов, свободы движения рабочей силы), которые рассматриваются Украиной как важные этапы ее полномасштабной интеграции в ЕС.

С учетом вышеизложенного, требуют комплексной оценки вопросы: значимости вхождения экономики Украины в ОЕЭП, диагностирования состояния экономики, степени ее совместимости с экономикой ЕС, готовности к реализации четырех экономических свобод, определения приоритетов экономического развития, работающих на ускорение и эффективность интеграции.

Для Украины вхождение в ОЕЭП обозначает: ориентацию и приближение к экономическим и социальным стандартам Европы, беспрепятственная работа на колоссальном торговом рынке, возможность имплементации экономической модели ЕС, использование опыта стран Центральной и Восточной Европы в отношении путей оптимальной трансформации экономической системы от административной к экономической. Однако в основе решения этой проблемы и со стороны ЕС, и со стороны Украины должны лежать принципы экономического прагматизма.

Диагностика состояния экономики Украины свидетельствует о противоречии аргументов в пользу возможности / невозможности вхождения ее в ОЕЭП. SWOT – анализ свидетельствует, что сильными сторонами, содействующими вхождению Украины в ОЕЭП являются следующие:

- Украина впритык приблизилась к одному из ключевых Копенгагенских критериев – наличие рыночной экономики. Рыночный характер украинской экономики признан Канадой и Индией.
- Сохраняется, требуемая Копенгагенскими критериями, макроэкономическая стабильность. Темпы изменения ВДС за отдельными видами экономической деятельности (к предыдущему году) характеризуются следующими данными: 1997 г. - - 4,3%, 1998 г. - - 2,0%, 1999 г. - - 0,2%, 2000 г. - + 5,0%, 2001 г. - + 8,9%, 2002 г. (ВВП) - + 4,1%. Рост имеет широкий базис (в основных отраслях промышленности, сельского хозяйства, на транспорте, во внутренней торговле).
- Стабильно расширяется внутренний совокупный спрос, что подтверждает динамика денежных доходов населения и инвестиций в основной капитал. Темпы прироста инвестиций в основной капитал (+12,4% за первое полугодие 2002 г.) и реальных денежных доходов населения (+ 21,9 % за 11 месяцев 2002 г.) существенно превышают динамику роста ВВП и промышленного производства.

- Сохраняются стабильные условия для экономической деятельности – низкая инфляция и стабильный валютный курс. В среднем за 2002 г. уровень фактической инфляции, составил 0,8%. Это позволило приблизиться к соответствующему критерию ЕС (2% инфляции в год), на фоне инфляции в странах – основных торговых партнерах увеличить уровень ценовой конкурентоспособности украинских товаров.
- Возросла валютная обеспеченность гривни (в 2001 г. на 57%., в 2002 г. (сентябрь) – на 71%). Государственный долг составил на 31.08.2002 г. 33% к ВВП при Маастрихтских требованиях – 60 % ВВП.
- Сохраняется, не смотря на ухудшение внешнеэкономической конъюнктуры, положительное сальдо внешней торговли (1996 г. – 339,5 млн.дол. США; 1997 г. – 424,0; 1998 г.- 350,7; 1999 г. – 2236,2; 2000 г. – 2952,4; 2001 г. – 2885,9; 2002 > 2100 млн.дол.США (за 8 месяцев)).
- Снизилась зависимость (в сравнении, например, с 1989 г.) функционирования экономики от связей с союзными республиками бывшего СССР.
- Имеет место переориентация с рынков сбыта СНГ на рынки других стран. Так, например, присутствие на рынках Европы возросло на 5,7%, Азии – в 1,3 р., Африки – в 1,1 р. Переориентация торговли на другие стороны мира дала положительный внешнеэкономический эффект. Если в 1989 г. УССР проводила внешнеторговую деятельность в больших масштабах и преимущественно из союзными республиками себе в убыток, в 2000 г., переориентировавшись на другие рынки, хотя и уменьшила ее, начала получать прибыль.
- Проведена существенная работа по вступлению в СОТ. Украина предварительно подписала ряд двусторонних протоколов по доступу к рынкам товаров и услуг.

Вместе с тем существует ряд нерешенных проблем, определяющих слабые стороны экономики Украины на пути в ОЕЭП. К ним можно отнести следующие характеристики:

- Украина находится в зоне бедности и входит в группу стран формирующих группу стран перефирийной мировой экономики (стран, которым государства «центра» отводят роль сырьевого придатка [4, С.103]). Если в странах ЕС – 15 средний объем ВВП на душу населения составлял в 2000 г. более 23,5 тыс.дол. США в год, то в Украине 783,1 дол. США. В этом контексте интеграция Украины в ЕС рассматривается как шанс перемещения ее из периферии в ядро мировой экономики. Это актуально, поскольку «неэквивалентный внешнеэкономический обмен между ядром и периферией характеризуется втягиванием периферийных стран в ловушки сырьевой

специализации и внешней задолженности» [5, С.11], что наблюдается в экономике Украины.

- На фоне усиления связей Украины с другими странами и ослабления их со странами СНГ резко ухудшилась структура экспорта Украины с точки зрения соотношения в нем удельного веса продукции машиностроения и металлообработки и суммарного удельного веса продукции нефтегазовой, химической и нефтехимической промышленности, что по оценкам некоторых украинских экономистов не только не приблизило Украину к ядру мировой экономики, а наоборот отделило от нее [3, С.74]. Потеряв роль мощного общесоюзного машиностроительного центра, она превратилась в импортера энергоносителей для переработки собственной железной руды, другого сырья в экспортируемую продукцию черной металлургии, химической и нефтехимической промышленности.
- Низкая конкурентоспособность экономики Украины не позволяет отрывать экономические границы, но желание быть членом СТО и ассоциированным членом ЕС требует именно этого.
- Еще не все преобразования отвечают всем критериям (в частности, Копенгагенским, а в дальнейшем Маастрихтским), которые предъявляются к ЕС.
- В Украине остается большое наследие экономических диспропорций, а фактически препятствий на пути ускоренного экономического роста на основе инвестиционно-инновационной модели развития и достижения надлежащего уровня благосостояния населения. Это капиталоемкая и ресурсозатратная структура производства, чрезмерно чувствительная к колебаниям мировой конъюнктуры, снос и моральное старение производственных фондов, значительное налоговое давление, низкий уровень оплаты труда [6, С.3]. В тоже время экономике стран ЕС в значительной мере свойственны черты новой экономики, в которой доминирует не производство, а деньги и финансовые системы. При сохраняющейся разнице между экономическими системами существует серьезное препятствие вхождения Украины в общеевропейское экономическое пространство, обусловленное явлением несовместимости.
- В региональной политике в Украине, в отличие от стран ЕС, где главной проблемой является проблема отношений «центр-регион», обострилась проблема «восток-запад», сущность которой состоит в различии в экономическом развитии и конкурентоспособности регионов на мировом рынке. Если в среднем по регионам Украины валовая добавленная стоимость в расчете на одного жителя в 2000 г. составляла 2788 грн., то в западных регионах она достигла: в Волынской области – 2104 грн., Закарпатской области – 1677 грн.,

Ивано-Франковской области -2142 грн., Львовской области – 2159 грн., Тернопольской области – 1605 грн., Ривненской области – 2118 грн., Черновицкой области – 1411 грн. Структурно-слабые западные регионы, с преобладанием сельскохозяйственного производства вскоре станут приграничными с ЕС. Если не будут приняты меры к поддержке (стимулированию) их экономического роста, они вместе с приграничными восточными регионами Польши, Словакии, Венгрии могут превратиться в «транзитную пустыню» между европейским и азиатским рынком.

- Институциональное обеспечение экономической деятельности в Украине существенно отстает от стран Европейского Союза. Не смотря на динамическое развитие банковской системы в Украине, качество и структура активов банков недостаточны для их финансовой надежности, высок уровень риска, недостаточен объем собственного капитала. Действует 20 банков с иностранным капиталом, 7 из них – с 100 – процентным. Однако, не смотря на возрастание значимости банков с иностранным капиталом, уровень их вложений в экономику Украины ниже, чем аналогичский показатель украинских банков. Банки с иностранным капиталом в большей мере сориентированы на межбанковский рынок.

Важно объективно оценить, что делают ЕС и Украина по ликвидации слабых сторон в создании ОЕЭП. Соглашение между ЕС и ЕАСТ (Европейской ассоциацией свободной торговли) (1992 г.) о создании с 1994 г. Европейского экономического пространства предусматривает создание общего рынка товаров в форме материального продукта, услуг, капиталов и рабочей силы. Фактически ЕЭП является базисом, предтечей ОЕЭП. Свои позиции к концу 2003 г., когда начнутся переговоры об условиях и сроках формирования ОЕЭП начала определять Россия [3, С.27]. В отличие от России, которая не определилась в отношении принципиального подхода (линия на вступление в ЕС в более или менее отдаленном будущем или развитие с ЕС более масштабных и глубоких ассоциативных отношений), Украина разработала Программу интеграции Украины в Европейский Союз (2000 г.). Утвержденная Президентом Украины Стратегия интеграции Украины в ЕС предусматривает сочетание общеевропейского измерения сотрудничества с региональной интеграцией и углублением отраслевого сотрудничества Украины и ЕС.

В настоящее время наступил период, когда как верно утверждает А.Шнырков, приоритетность с Европейским Союзом должна быть подтверждена системным перечнем конкретных шагов в этом направлении. Это имеет особую значимость, поскольку, с одной стороны появились барьеры на пути движения товаров, рабочей силы, услуг

(прежде всего финансовых) в страны ЕС, с другой стороны расширение ЕС и НАТО интенсифицирует интеграционные процессы на востоке Европы. Сложность принятия правильных решений состоит в том, что статические эффекты при условии вступления Украины, например, в ЕврАзЭС могут превысить статические эффекты от сближения с ЕС, хотя перспективнее -наоборот [7, С.6].

На наш взгляд, Украина должна задействовать факторы, направленные на использование сильных сторон готовности к вхождению в ОЕЭП, и нивелировать слабые стороны. В совокупности их можно разделить на внешние, связанные с реализацией соглашений с ЕС, вступлением в СОТ и т.п. и внутренние, связанные с необходимостью структурной коррекции экономики.

В составе первой группы факторов особое значение имеет реализация 7 приоритетных направлений имплементации Соглашения о партнерстве и сотрудничестве между Украиной и ЕС (СПС), в частности в области энергетики, торговли и инвестиций, приближения законодательства Украины к законодательству ЕС, юстиции и внутренних дел, защите внешней среды, транспорта, межрегионального и трансграничного сотрудничества. Реализация этих приоритетов идет высокими темпами. Начато сотрудничество в вопросах энергетической стратегии, реформирования газотранспортной системы Украины, улучшения системы учета на украинском оптовом рынке электроэнергии, развивается национальная сеть Международных транспортных коридоров, выполняется Программа создания и функционирования национальной сети международных транспортных коридоров, гармонизируется транспортное законодательство; ЕС в рамках Плана действий начал поддержку эффективного управления миграционными процессами, в борьбе с «отмыванием» денег, в борьбе с торговлей людьми, наркотиками, орудием, контрабандой.

Большое значение для Украины имеет углубление сотрудничества с ЕС в сфере торговли, что позволит значительно либерализовать взаимные торговые отношения, заключить Договор о свободной торговле. Базовым элементом интеграции Украины в ОЕЭП является вступление в СОТ, в направлении чего: а) проведены двусторонние переговоры по доступу к рынкам товаров и услуг со странами-членами Рабочей группы по рассмотрению заявки Украины по вступлению в СОТ; б) завершается формирование обязательств по доступу к рынку услуг Украины; в) сделаны существенные шаги по гармонизации национального законодательства с нормами и требованиями СОТ; г) Указом Президента утверждена Программа мероприятий по завершению вступления Украины в СОТ, которая содержит организационные аспекты процесса вступления.

Существенное значение для вхождения Украины в ОЕЭП имеет получение «социальных» преференций в рамках Генерализованной Системы Преференций ЕС. Сейчас Украина уже пользуется общими преференциями ГСП ЕС относительно 92 из 96 группы товаров Комбинированной номенклатуры. При распространении на Украину «социальных» преференций уровень тарифов в отношении 92 групп обозначенных товаров снижается на 5%, что существенно повысит конкурентоспособность их на рынке Сотрудничества. Таким образом сделаны шаги по реализации первых двух «основных свобод».

Довольно быстрый прогресс возможен в либерализации движения капиталов, в чем заинтересованы и ЕС и Украина. Это означало бы не только взаимное поощрение инвестиций в целом, но и ограничение инвестиций из стран-партнеров в ряде «чувствительных» секторов – банковском, военно-промышленном и т.д. в соответствии с общепринятой мировой практикой, а также придерживание принципа взаимности и симметричности.

Особого внимания требует решение проблемы либерализации движения рабочей силы, ввиду интенсивности этих процессов и слабой их отрегулированности. Требуется обеспечение равных прав украинских мигрантов в Европе с другими мигрантами, регулирование порядка привлечения и найма ученых, специалистов, квоты на найм и его условия в области оплаты, страхования, сроков действия трудовых договоров.

В контексте активизации первой группы факторов для Украины актуально подписание Европейского соглашения нового типа, которое позволило бы вовлекать нашу страну в программы ЕС – от экономических и транспортных к научным и образовательным.

Уже в настоящее время определены основные направления сотрудничества Украины и ЕС в этой сфере: обмен научно-технической информацией; совместные мероприятия в области НИОКР гражданского назначения: обмен учеными, исследователями и технологами, участвующими в совместных программах НИОКР. ЕС финансирует совместные исследования в Украине в рамках программы ТАСИС и TEMPUS, в которых принимали участие многие украинские ученые. В период финансового кризиса это способствовало сохранению научного потенциала Украины. Вместе с тем следует отметить, что позиции ЕС и Украины не одинаковы в фундаментальных и прикладных исследованиях. Если ЕС превосходит Украину в области прикладных исследований, то в области многих фундаментальных исследований за Украиной признается мировое лидерство, что подтверждает необходимость и возможность научно-технической интеграции.

Активизация второй группы факторов должна быть направлена:

- во-первых, на перенос экономики Украины с состояния «экономики периферии» в состояние экономики ядра, который позволил бы ей при формировании ОЕЭП не пассивно приспосабливаться к предложениям ЕС, а ставить вопрос о взаимной, хотя возможно и асимметричной адаптации (с уклоном в пользу запросов ЕС). Нельзя считать, что чем раньше Украина вступит в ЕС, тем ей будет лучше. Она должна вступить – и именно это для нее лучше, - когда будет к этому готова;
- во-вторых, на смягчение последствий формирования новой восточной границы ЕС и введения визового режима.
- Актуальными направлениями деятельности в плане выведения экономики Украины со статуса периферийности являются:
- экономическая модернизация, опирающаяся на собственные конкурентные преимущества и высокотехнологические отрасли: ракетно-космическая, самолето- и моторостроение, отрасли товаров народного потребления, транзитные перевозки и трубопроводный транспорт, биотехнологии, машиностроение, электроэнергетика, развитие информационных технологий, АПК. Эти направления определяются как приоритетные и требуют кредитной поддержки банковской сис
- темой [6, С.3];
- внедрение ресурсо- и энергоэкономных технологий и производств, обеспечивающих снижение ресурсо- и энергозависимости украинской экономики;
- развитие инновационно-технологического, продуцирующего малого и среднего бизнеса, способного обеспечить создание 60-70% ВВП, быть конкурентоспособным на глобальных рынках, что позволит решить проблемы безработицы, бедности, расширения совокупного спроса и использования собственного инвестиционного ресурса;
- повышение конкурентоспособности продукции агропромышленного комплекса;
- активизация реализации приоритетных инновационных проектов, вплоть до применения механизма государственного заказа на их разработку. Сегодня 90% продукции, вырабатываемой промышленностью Украины не имеет современного уровня научно-технологического обеспечения. Удельный вес Украины в мировом объеме торговли наукоемкой продукцией составляет 0,1% [8, С.3];
- переориентация на научно-технологический вариант экономического роста, возобновление исследовательско-промышленных производств, опережающее развитие фундаментальных научных исследований, закладывающих основу принципиально новых технологий, что в

совокупности обеспечит технологическое и производственное обновление экономики;

- развитие рынка интеллектуальной собственности, страхование рисков инновационных проектов, создание дополнительных факторов содействия научным учреждениям.

В контексте смягчения последствий введения нового режима западной границы Украины актуальным остается:

- еврорегиональное сотрудничество. Изменения не исключают межрегиональную трансграничную кооперацию. Подтверждая факт межрегиональной конкуренции, можно отметить весомые аргументы на пользу межрегиональной трансграничной кооперации, в частности: 1) недопущение формирования территории «транзитной пустыни»; 2) сферы общих интересов (совместное использование и мобилизация ресурсов, привлечение инвесторов, которых интересуют масштабные проекты; человеческие ресурсы и эффективность их использования; развитие инфраструктуры, межрегиональные трансграничные отраслевые рынки, техническая помощь международных организаций, региональный маркетинг); 3) устранение явления дуализма экономического развития, свойственного, например и Украине и Польше, когда существует разница в развитии западных и восточных регионов. Сферами межрегиональной трансграничной кооперации могут стать: выработка стратегий в отношении приграничных территорий (в контексте расширения ЕС); влияние на центральную государственную региональную политику с целью формирования поддержки приграничных территорий; влияние на отраслевую политику по отношению к отраслям, которые имеют существенное влияние на развитие регионов-партнеров (например, развитие транспортных сетей);
- мониторинг экономического и социального развития, регионов по обе стороны границы по стандартам ЕС для принятия управленческих решений на национальном, региональном и наднациональном (общеевропейском) уровне;
- развитие инфраструктуры межрегионального сотрудничества и приграничной инфраструктуры;
- расширение участия отдельных областей Украины в работе Ассамблеи европейских регионов и других международных европейских организаций, обеспечение реализации «Европейской Рамковой Конвенции о трансграничном сотрудничестве» между территориальными общинами или властями;
- участие регионов, отдельных отраслей и предприятий в международных европейских выставках и общих проектах;

- продолжение работы по сооружению международных транспортных коридоров, обустройству граничных переходов;
- инициирование создания для Украины программ ЕС в отношении поддержки регионального развития и подготовки к процедурам использования структурных фондов (на образец программ в странах Центральной и Восточной Европы).

Все мероприятия должны быть нацелены на формирование однородного социально-экономического пространства на основе углубления международной кооперации труда между предприятиями стран-участниц Европейского экономического пространства, развития совместной предпринимательской деятельности, формирования общей банковской, транспортной и промышленной инфраструктур, создание единого рыночного пространства, финансовой системы, согласования политики регулирования потоков рабочей силы, выравнивания развития территорий, входящих в состав еврорегионов.

Украинские ученые-экономисты допускают вероятность того, что расширение ЕС приостановится раньше, чем к этой структуре присоединится Украина. Однако это не исключает, что страна должна стать нормальным европейским государством, находиться на ведущих позициях среди постсоциалистических стран с конкурентной экономикой и надлежащим уровнем жизни, способной работать в рамках ОЕЭП.

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Summary

ACTUAL PROBLEMS OF UKRAINE'S ECONOMY DEVELOPMENT WITHIN FORMATION OF COMMON EUROPEAN ECONOMIC AREA

The specific features of modern stage in formation of Common European Economic Area (CEEA) were classified. The diagnosis of Ukraine's preparedness to join the CEEA, based on analysis of CWOT, was made. The most favorable and most restraining parts of this process were identified.

The author believes that Ukraine should activate factors aimed at leveling of restraining parts and activation of favorable ones. Moreover, external elements, i. e. those related to implementation of joint agreements with EU and internal elements, i. e. those related to the necessity in structural correction of the economy can be pointed out within favorable and restraining parts.

The first group of factors involves: 7 priority trends of implementation of Agreement on partnership and cooperation between of Ukraine and EU, entry into the WOT, obtaining of “social” preferences within Generalized System of EU Preferences, liberalization of money flows, improved regulation of labor migration.

Activation of the second group of factors should be oriented towards transition of Ukraine's economy from “peripheral economy” into the “substance economy”, alleviation of formation of the new East EU border and implementation of visa regulations. Actual trends of work within settling of these problems were defined.

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THE EUROPEAN DIMENSION OF UKRAINE

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The name of the European Union itself means that the main goal of real Europeans is to create not only Western European but Common European House. Without Ukraine and its Southern and Northern neighbours, i.e. Moldova and Byelorussia, this house will be incomplete, insufficient, asymmetrical and illogical, because Ukraine is the center of Europe. Even in times of Austria-Hungary, geodesists set up the obelisk of the center of Europe nearby the city of Rakhiv (Transcarpathian region). So how can something be complete without its center, like an organism without heart and spine?

The European union that faces the Atlantic ocean has possibility to broaden up only towards the European East. Having united nations and states all over the European civilized area, the EU is becoming the most powerful social and economic, political and spiritual organism of globalized human community. Europe should be united and grouped according to the directives of John Paul II, proclaimed in the city of Hnyesno on June 3, 1997 in presence of the leaders of the Central and Eastern European states. In his proclamation the pontific appealed to Europeans to strengthen the peace. He said that any nation, even the least significant, shouldn't be left behind the community. The reference of the Pope to human values obtains a new meaning nowadays. Historical understanding and inner necessity of the Pope is manifested in effort to build a spiritual bridge to unite nations of East and West.

The Ukrainian nation and its state organizations have been in the epicenter of the European history for more than 6 millenniums. Archaeological findings and written sources assure the civilization role of our predecessors in the life of the European nations. On the area of present-day Ukraine there was a formational center of the Indo-European ethnic community. From that starting point people spread to East and West, North and South and gave birth to many nations. At the same time the Ukrainians remained on their rich land with its beneficial mild climate, forming their grain-growing nation and bringing in significant contribution into the European civilization process. Nowadays it is impossible to withdraw the Ukrainian nation and the state from the European integration process. Because this will contradict the logical development

of humanity and the needs of security, peace and co-operation between European countries. Ukraine always was, is and will be in Europe and that is why any attempts to separate it from the EU will surely fail. The sooner the EU politicians realize this, the better it will be for all of us. Let us consider the main directions of the European dimension of Ukraine and possible ways of integration into Common European House.

Ukraine in the European Civilization Process

Mild climate, rich and diverse nature assists to the formation of the specific mentality of the Ukrainian nation, nation of wealthy landowners, independent and freedom-loving people. They always were friendly, hospitable, kind, but envious neighbours took it as a sore point always trying to concur them. The serfdom law did not exist on the territory of Sweden and Ukraine. Corvée was imposed by Russian and Polish landlords. Such features of Ukrainian people assisted to the formation of high intellectual potential which remains one of the highest in the world (in spite of the fact that a lot of strangers tried to destroy it).

The roots of the Ukrainian nation comes from tribes of Tripil' culture more than 6 thousand years ago. The majority of scientists consider Tripil' tribes to be the ancestors of Slavs, especially the Ukrainians. Archeological findings in more than 1200 settlements between the Dnipro and the Dnister proved that the pottery and agricultural implements were the same as in contemporary Ukrainian population on this territory. Deciphering of aerial photographs allowed our topographers to discover the Tripil' ancient cities – Maydanetske and Talyanky (450 hectares), that exceeded the cities of ancient Greece and Rome in area and in development of handicrafts. Our ancestors were the first in Europe to domesticate a dog and a horse, to invent a wheel. These facts were proved by Polish, Czech and American scholars.

The contribution of the Ukrainians into the European and world civilization process is very significant but it is not well known not only by Europeans but also by the Ukrainians. Let us consider the contribution of the Ukrainians to European education, science and culture.

The education in Ukraine has old and famous traditions. It dates back to the times of Volodymyr the Great. There were church and monastery schools, the books were written and translated into old Slavonic language. The education in the period of Hetmanship turned out to be the world phenomenon. Literacy covered 90% of adult population. Philosophy, politics, poetry, music (especially church music) were honoured and respected. Russian Empire destroyed the Ukrainian education, banning the education in Ukrainian language, printing Ukrainian books and newspapers, organization of concerts and performances in Ukrainian.

The Ukrainian school and pedagogical science always was in vanguard of world educational system. Ukraine presented the world such famous pedagogues – enlighteners as K. Ushynskiy, O. Potebnya, A. Makarenko, V. Sukhomlynskiy, H. Vashchenko. The rest of Europe can be proud only of the names of J.Pestalozzi and Y.Kamens'kiy.

The Ukrainian science was and is the integral part of the European and world science. Achievements of the Ukrainian science were and are significant not only on the native land but in exile, in Diaspora as well. In times of Empire mechanics, mathematics, physics, cosmic science were of primary importance. We are proud of the mathematicians M. Ostrogradskiy and M. Kravchuk, the cyberneticist V. Hlushkov, the mechanic S. Tymoshenko, the mechanic and physicist M.Bogolyubov, the physicist I.Pulyuj, the geochemist V. Vernadskiy, the biochemist I. Horbachevskiy, the microbiologist D. Zabolotniy, the first Ukrainian Nobel prize-winner, biologist I. Mechnikov. Especially significant is the contribution of the Ukrainian scholars to the development of cosmic sciences and rockery (O. Zasyad'ko, M. Kybalchych, K. Tziolkovskiy, Y. Kondratyuk, S. Korolyova, V. Hlushko, M. Yangel, V. Cholomey). The humanities have developed not so successful, but still there are such outstanding figures as the philosopher H. Skovoroda, the philologist O. Potebnya, the historian M. Hrushevskiy, the orientalist A. Krumskiy, the economist M. Tugan-Baranovskiy, the antropologist M. Miklukho-Maklay, the geographer S. Rudnytskiy.

The high level of the Ukrainian culture is testified by antiquity and perfection of Ukrainian language. Linguists call Ukrainian a key to the most ancient language of Sanskrit. In addition to that the Ukrainian folk song is considered to be one of the most significant cultural achievements of mankind. The famous Ukrainian opera singers S.Krushel'nytska, O. Myshuga, I. Kozlovskiy, D. Hnatyuk, Ye. Miroschnyenko were acknowledged by the world. Ukraine gave the world such composers as A. Vedel', D. Bortnyanskiy, M. Berezovskiy, M. Hlinka, P. Chaykovskiy, S. Prokofyev, I. Stravinskiy. V. Avramenko and S. Lyfar have become the coryphaeus of the European ballet.

The Ukrainian theatre became world-wild acknowledged. We are proud of such stage-directors as the Tobilevych brothers, M. Kropyvnytskiy, Les' Kurbas, R. Viktyuk, the drama actors M. Zan'kovets'ka, A. Buchma, N. Uzhviy, B. Stupka. The films of O.Dovzhenko are considered to be the most prominent masterpieces of the XX century. The pictures and sculptures by I.Ryepin, D. Levyskiy, O. Arkhopenko, K. Malevych are known to every well educated European. Hutsul carving, Ukrainian embroidering, Ukrainian pysanka (a decorated egg) are unique phenomena. This list may be continued but the given information is sufficient to estimate the contribution of the Ukrainians to the European civilization.

Ukraine should gain the appropriate place in all European structures. The policy of our state should be the Ukrainian one and its vector – the European one. Europe should know Ukraine better because Europeans look at Ukraine through Russian or German “glasses”, which humiliate our national dignity and depreciate the contribution of the Ukrainians into European civilization. The talk between Ukrainian scientists and A.Einstein, who was a foreign member of Scientific Society named after Taras Shevchenko, is extremely significant. A.Einstein was asked about unfair awarding of the Nobel Prize to Roentgen instead of I.Pulyuy for invention of X-rays. Roentgen only repeated the printed results of the Pulyuy’s investigation. A. Einstein replied, “Who is Pulyuy? The Ukrainian, a representative of the unknown nation. And Roentgen is a representative of highly developed and cultured German nation, so that is why such invention should belong to him.” If the Ukrainian state had existed at that time, the Ukrainians would have worked and brought fame and respect to it in the world.

Ukraine in the European Geopolitical Space

The absence of Ukraine on the political world map was perceived as geopolitical abnormality, as deformation of the world political space, that caused a great tension on the continent, and became a great national tragedy for the Ukrainians. According to the definition of a famous American politician of Polish origin Z.Bzhezinskiy, the peaceful restoration of the Ukrainian independence has become the most significant political event of the second half of the XX century.

Ukraine is the independent state, that was acknowledged by more than 150 countries of the world. The territory of Ukraine (its area occupies 603,7 thousand sq.km) and its population (48 million people) are favourable for all-round development and prosperity as a great European country. Ukraine has very suitable geopolitical, economic and geographical location. It lies on the crossing of transcontinental roads, that lead from Western Europe to Eastern Europe and Asia, from Northern Europe to Southern Europe, Near East and Africa. Ukraine faces the Black sea connected with the world ocean. The newly independent state has not learned to make use of its favourable position.

Ukraine has its strategic partners, first of all Poland, the USA, Hungary, Canada, Lithuania. We are looking forward to Russia’s becoming our real strategic partner though at present it performs two opposite functions – as a nominal strategic partner and as the only real strategic enemy.

For example, rude aggressive action of B.Yeltsyn against Ukraine took place in 1992 when he put under Russian supervision the Black Sea Military Fleet, that was based at the ports of the independent state of Ukraine. At that time Ukraine couldn’t respond to this act of aggression. This caused that Russia

appropriated 86% of ships of the Fleet, almost the whole property of military bases, and forced Ukraine, despite the Constitution, to form on the territory of Ukraine its own military base.

Hostility of imperial Russia can be traced in its attitude towards the ethnic Ukrainians, the number of whom reaches from 10 to 20 million. This is the only country where the Ukrainian inhabitants do not have any Ukrainian school, theatre, publishing house or state radio or TV programmes broadcasting in Ukrainian.

Coming into existence of the independent Ukraine in the center of Europe has become turning point in the European political history. Peace-loving and tolerant Ukrainian nation and its state haven't got any territorial and property claims to its neighbours or other countries and nations of the continent. Ukraine expresses claims only to Russia, which has declared itself the only inheritor of the former USSR, having misappropriate all the property and financial funds and does not have any intentions to provide compensation to victims of the colonial terror.

The future political configuration of Europe, its security and prosperity seem to be impossible without an active participation of Ukraine. Together with France, Germany and Poland our state is to become the core point of peace and security in Europe, i.e. to create "the Veimer quadrangle", extending the existing triangle. In his book Z.Bzhezinskiy predicts that Ukraine would become the partner of Veimer Treaty by 2010.

The essence of the concept of "the Veimer quadrangle" lies in its structural completeness, perfection and future prospect. The states of "the Veimer quadrangle" form the backbone of the European security, which stretches from the Atlantic ocean to the Black sea. The population of "the Veimer quadrangle" is 230 million people, bearing a considerable potential taking into account the resource, industrial, intellectual and military development.

The strategic co-operation between the countries of "the Veimer quadrangle" will stop the confrontation between the Slavonic and the Roman and Germanic states in Europe. Two pairs of countries (France and Poland, Germany and Ukraine) may counterbalance the European interests, because these countries don't border each other and haven't got any reasons for mutual hostility. Care for the common European interests will destroy misunderstanding and the barriers between the countries of the historically built Veimer quadrangle.

Ukraine in the European Economic Space

Ukraine possesses the fifth place in the world due to its income resource potential. The soils of Ukraine are the most valuable national wealth. More than 60% of the territory of Ukraine are covered with fertile black soils, that form the third part of the world stock. Ukrainian land can provide 400-450 mil-

lion people with food on condition that the modern agricultural machinery and cultural and cropping methods are used. The entrails of the earth are abundant in coal and brown coal, marsh gas, iron ore, manganese and titanium ore, gold, diamonds, amber, high quality building materials, granite and marble in particular. Only 30% of the territory of Ukraine is investigated by the geologists. The climate of Ukraine is mild and favourable for living and agriculture. The Ukrainians are well-educated (2,2 million students are studying at Universities) and law-abiding citizens, which have all possibilities to build the rich and prosperous state in the nearest future on condition of transition to the democratic society and market economy, overcome the arduous heritage of the colonial past. And the heritage is really arduous. The Russian (Asian) political, social and economic society model was imposed for more than three centuries.

The essence of the Asian society model was perfectly disclosed by the Russian scholar and politician Yegor Gaidar in his book "The State and the Evolution". Such model originated from India and China and imposed in the Central Asia and Russia by the Tatars and the Mongols. The political system is based on the absolute authority of sovereigns and dependant on them officials. The Shan Yan's principle "The powerful state – the weak nation" is put into practice. But weak and poor nation constantly revenges its country. The officials concentrate in their hands the property of the country, i.e. lands, natural resources, plants and factories, banks and finances. In this system power and property are indivisible, moreover the power is of primary and the property is of secondary importance.

The very important reason for economic stagnation and depression in Ukrainian social and economic spheres is a colonial type of its economy in the period of its consisting in the Bolshevik's Empire. Colonialists have made the economy of Ukraine completely dependent on the imperial center. Ukraine was to stay as a source of raw materials for Russia.

But the greatest plunder of Ukraine happened before and during the breakdown of the USSR. At the beginning of 1991 the leaders of the CPSU and Russia managed to transfer all savings of the Ukrainians, concentrated in the Provident bank to Moscow, where they were converted into dollars and deposited in foreign banks (that is 150.5 milliard US dollars). Now the government of Ukraine have to pay off these debts to its citizens from its own budget.

The government of Ukraine agreed to adopt a zero variant of dividing property and assets of the former USSR. Russia left itself all the assets, including foreign currency, supplies of gold, diamonds, platinum, accounts at foreign banks, etc. Such concession of Russia with declaration of the zero variant costs Ukraine not less than 50 milliard US dollars according to rough calculation of economists. In addition to that the stolen Ukrainian Military Fleet, a large property of the foreign diplomatic missions, different enterprises and financial

institutions, that were misappropriated by Russia, should be taken into consideration.

The Chornobyl catastrophe is the biggest and the most serious ordeal for the Ukrainian nation. Ukraine has suffered lots of financial and human losses. The station managing and staff selection were under the Moscow control and the Ukrainians paid just money for energy usage.

Under the pressure of Moscow Ukraine has found itself in a specific informational "ghetto". Ukrainian enterprises are being bought up by Russian firms for nothing, in order to get rid of competitors. For the absence of the favourable investment climate the foreign investments are not provided to Ukraine.

The Russian special state security forces, Russian diplomatic corps, financial institutions try to isolate Ukraine from Europe, try not to let the foreign investments in, because they want to gain control over Ukraine by means of introducing petrodollars. At the same time the European Union, World and European financial institutions do not meet their engagements, dealing with closure of the Chornobyl NPS and finishing the building of the Rivno and the Khmelnytsk Nuclear Power Stations. Under the influence of world civilization processes the links between Ukraine, NATO and the EU are strengthening. At the same time the postcolonial links between Ukraine and Russia are weakening. For example, in 1994 trade turnover with Russia formed 47.5 % of the volume of Ukrainian foreign trade, and in 2002 it decreased to 29.4%. On the contrary, the volume of foreign trade with the EU countries has increased.

Ukraine needs Europe, the European Union, NATO to revive its European identity, to build Common European House together with democratic European nations. Europe also needs Ukraine as its constituent part, as one of the significant components of its security and prosperity.

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Streszczenie

EUROPEJSKI WYMIAR UKRAINY

Ukraina leży w Europie Środkowej i w ciągu całej swojej historii odgrywała znaczącą rolę w politycznym, społecznym i gospodarczym życiu kontynentu. Wysoki potencjał intelektualny narodu ukraińskiego pozwolił wnieść mu duży wkład do europejskiego skarbcza kultury i sztuki oraz nauki i oświaty. Ukraińscy badacze i konstruktorzy zaliczani byli do czołówki takich dziedzin naukowych jak: budowa rakiet i podbój Kosmosu, elektronika, informatyka, konstrukcja samolotów i czołgów, biologia oraz ochrona środowiska. W uwarunkowaniach geopolitycznych Ukraina występuje jako gwarant pokoju i bezpieczeństwa w regionie oraz stanowi barierę w konflikcie pomiędzy cywilizacją europejską a azjatycką. Ukraińcy uratowali europejczyków przed najazdem tatarskim i mongolskim oraz przed ekspansją turecką. Funkcja graniczna oraz funkcja pojednania dwóch cywilizacji ze strony Ukrainy jest i będzie bardzo potrzebna dla całej Europy.

Ukraina należy do najbogatszych w zasoby naturalne państw Europy. Posiada ona 28% światowych zasobów czarnoziemów – najbardziej urodzajnych gleb. Wysoki jest także potencjał przemysłowy państwa. Po kryzysie Ukraina zostanie nieodłącznym segmentem społeczno-gospodarczego kompleksu Zjednoczonej Europy.

CONCEPTUAL BASES OF UKRAINIAN REFORMS AND LINKAGE TO AGRICULTURAL SECTOR

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During the period of independence of Ukraine the importance of market transformation, its stages and components were studied. However, to date, the theoretical basis of changes and concepts of further transformation of the national economy have not been investigated. This paper, first, attempts to examine the different theoretical approaches to metamorphoses of the Ukrainian economy. Next, the peculiarity of agricultural reforms is discussed. Finally, conceptual directions for the development of the transitional economy of Ukraine, and, as an example, agricultural sector, are presented.

Introduction

An empirical model of a transitional economy moving from a planned command-administrative system to a market-oriented economy is formed from a certain theoretical and practical background. But, the questions of scientific provision of the ongoing reforms, in our point of view, do not have unequivocal agreement. The two extremes of the poles of economic systems - command-administrative and market economy - have been investigated and described in detail. Nevertheless, a theory of transitional economy, which occurred in social-economic formations beginning in the middle of the eighties of the last century, has not been elaborated. Responsibly, the society has no receipts for market transformation. During the process of reformation of the Ukrainian economy - starting in the 1990's - one had to act intuitively, making mistakes and learning through trial and error.

In this paper we are interested in system theories, which relate to the socio-economic bases of different types of societies. Just one side of the mentioned problem was examined in Ukraine with the emphasis on a deep knowledge of social systems. The above approach corresponded to economic rather

than political systems. Western social-economic theories were examined regarding these issues. When Ukraine became an independent state and social reforms started, the socio-economic situation began to change and polarize, as knowledge of western economic theories became more widespread.

Gradually, certain points of view on market reforms (e.g., Heets', 1999), such as the strategy of agricultural sector transformation (Lukinov and Sabluk, 2000; Sytnik, 2002), doctrines of agro-products safety (Yurchyshyn, 2001), policy of agricultural development (Cramon-Taubadel et al., 2001), directions of post-reforms development of agricultural sector (Lukinov, 2002; Sabluk, 2002; Kyrylenko, 2003) and numerous others formed in Ukraine due to their experiences in market transformation.

Implementation of transformation reforms is far from complete - problems still exist. The most important issue is the question of the agricultural sector of the economy. The present article is dedicated to the problem of forming a conceptual basis for Ukrainian reforms, which is built on the foundation of dominant system theories and using as an example, the agricultural sector of the Ukrainian economy.

The Theory of Liberalism

The one scientific direction used as a basis for transformation changes in the post-socialist countries was liberalism. Liberalism originates from the philosophical-psychological concept of "the natural state" of society as suggested by J.Locke (1690) – freedom and equality of people, social agreement (special prototype of modern society), and also "free trade" of Physiocrats. The theory of liberalism made its way from the "invisible hand" of Adam Smith (1776), and "spirit of laws" of Montesquieu S. (1748) - to new modern liberalism. The development of liberalism has been greatly influenced by the works of L.Mises and F.Hayek, who have been called by J.Komai (2000) the creators of the modern paradigm of liberalism.

One of the reasons of liberalism concepts application at the first steps of economical and social reforms, on our point of view, was a constant criticism of the liberal directions of social systems and the main problems they incurred. The social system proved to be imperfect, than theory, which criticizes it, was accepted as valid.

As L.Mises thinks, the inevitability of any system of socialism and central planning was defined by the impossibility of any economic calculation in the conditions of absence of private property on production facilities, when market prices, which evaluate real participation of different factors, do not exist (Mises, edition, 1999). Hayek points out the impossibility of competition (as a main engine of development) in a planned economy: if somebody wishes to use competition in a social state for the solution of economic problems, then

half – measurements would not really help in getting positive results (F.Hayek, edition 2001).

Having experienced totalitarian management and the use of state power, the Ukrainian society accepted the concept of liberalism and its proposed role of state. That is, the state, which possesses organized and controlled power, should represent a smaller part of the significantly larger society. It should provide a legal framework, inside of which (therefore, managed unconsciously) the cooperation of people would have maximal space (F.Hayek, 2001).

The theory of liberalism was further developed in neoliberal directions, through the efforts of the Freiburg School of ordoliberalism (Eucken W., Röpke W., Rüstov A. et al.), and the French school (Allais M., Rueff J.). A separate version of neoliberal thought stands out in the work of the Chicago school of monetary thought (Knight F., Friedman M., Schwartz A. et al.). It is also important to recall the theory of rational expectations (Lucas R., Sargent T.), which investigates the reactions of individuals given changes in their economic situations, and assumes that individuals strive to maximize their goals, which optimizes the economic situation in general.

Modern representatives of neoliberalism (Williamson J., Sachs J., et al.) believe free market mechanisms are the most favorable preconditions for an effectively functioning economic system; but they have revised their ideas on the role of state. They now admit the need for the state to play role in the support of the normal functioning of markets, competition, etc. Hence – a “simple” way of reform: to create market institutions and provide for their effective functioning (Sachs, 1996). While acceptable in theory, the implementation of this idea has not been easy.

Another important reason for implementing concepts of liberalism in post-soviet countries is because of the outcomes in countries where it has been in practice, on developed countries, for example, the USA, liberal concepts have worked successfully. The USA has created the model for the modern world by its ethical practices, political thought, technological achievements, and in particular, its public and detailed analysis of its own successes and losses. It has been an example for the members of the international community to follow (Kremenuk, 1999). Besides the United States, transformation experiences based on liberal principles, in the countries of Eastern Europe, has also been positive.

Despite criticism from socialist elements and some idealization of liberal model, the main elements of this transformation process have appeared on early phases of reformation in Ukraine - production facilities becoming privately-owned; entrepreneurial behavior; minimization of state interference in the economy; the liberalization of prices and foreign trade, etc.

At the same time, the adoption of foreign experiences in Ukraine came with little knowledge of market transformation processes. The adoption of a market economy in the Ukraine took place with little consideration of the

need to develop the initial conditions needed for such institutional changes to be effective. "Pure liberalism" requires appropriate conditions for its implementation. Since such conditions are difficult to achieve it has been realized nowhere in the world.

As for the Ukrainian agricultural sector, the use of liberal concepts in the form of "shock therapy" during the first years of reforms resulted in a significant loss, due to the unregulated disparity of prices. Other factors that may limit the use of liberalism in the agricultural sector according to Lopatynskyy (2002) may include:

- the use of land, as a main resource in agricultural production, brings out problems related to the purchase and sale of land and highlights the necessity of state interference and the need for certain restrictions in the process. At the same time one must take into consideration the duration of the period being considered and the complicity of formation of land market in the conditions required in a transition economy;
- organizational and functional peculiarities of agricultural production, in conjunction with the unification of economic and biological processes, and a significant dependence on the climate conditions and other factors;
- specificity of constant conservatism in psychology and the manner of peasant life;
- the adoption of foreign experiences in state government of the agricultural sphere, without regard for the given economy.

The concept of liberalism has also played positive role in the quick implementation of the main principles of an economic system. Democratization of social life is important for an increase in the level of economic freedom.

One should not just dismiss the strategy of economic liberalization, but instead reject those principles of radical liberalism that are implemented by "shock" methods. This was caused by the absence of the socio-economic conditions, required acceptance by society as well as an economic system based on ultraliberal principles. As for the Ukraine, we think that increasing the level of liberalization of our national economy should remain a strategic goal. The realization of this goal is achievable at the end of the transformation period and with the setup of a fundamental market economy, for instance, in the agricultural sector.

Classification of Economic Theories

The U.S. Depression and other following economic crises, as well as the development of Keynesian economics (Keynes, J.M., 1936) served as initial incentives for reviewing the idealized concept of classical liberalism.

Among the significant variety of different concepts and theoretical approaches to the economic systems, one can define three classifications, how-

ever, these have gradually began to resemble one another as their differences have disappeared over time:

- theories of neoclassicism and economic liberalism – the paradigm of Mainstream economics;
- the theory of managed economies and active state interference in the development of such economics – dirigisme;
- theories of institutional-social direction.

There have been many attempts to unify these theories – for instance, in their concept of “neoclassical synthesis” (Hicks J, Samuelson P.) the authors tried to combine methods of market and state regulation, neoclassicism and neokeynesianism.

At the same time, opposite points of view on the concept of concrete doctrine formation along the axis of mono-line development exist (the paradigm of “Mainstream”): as approval, so contradiction.

We consider the institutional approach the most acceptable concept of social system formation for the current stage of development of the Ukrainian economy, including agricultural reforms.

Institutionalism is characterized by the absence of clearly defined concepts and borders. The birth of institutionalism as a theory in the first half of the twentieth century had links to three directions: 1) social-psychological (Veblen T.); 2) social-law (Commons J.R.); and 3) empirical, conjuncture- statistical (Mitchel W.C.).

The next stage of development of institutionalism was caused by the arise of ideas related to positivism (Clark J., Berle A., Means G. et al.) and originated from sociological underpinnings. A third period of institutionalism took place in the 1960's and 70's of the twentieth century (Galbraith J.K., Myrdal G. et al.). The concepts of institutionalism are present in works of other scientists as well. For example, they can be found in the industrial-technological domain, in different theories of the transformation of capitalism, convergence, the concept of a post-industrial information society, etc. They have been noted by well-known scientists such as: Gruchy A., Rostow W.W., Bell D., Drucker P., Toffler A., and numerous others. The separate components of institutional direction are the theories of social choice (Buchanan J. et al.) and legal law economy (Alchian A., Pejovich S. et al.). The concepts of transaction expenditures and property rights played an important role in the birth of institutionalism (Coase R.), in particular, with the regard to the development of neoinstitutionalism.

Neoinstitutionalism arose in the 80's and 90's of the twentieth century on the wave of a crisis within classical and neoclassical concepts. As a representative of neoinstitutionalism, North D. (1997) thinks neoclassical theory (as do other theories of social sciences) cannot provide a satisfactory explanation of the differences in the functioning of societies and economies as any given point of time. This is particularly problematic, when the development of a the-

ory of institutional change is a necessary condition for the further progress of social sciences in total and, especially, of the science of economics.

Williamson O., Demsetz H., Menard C., Olson M., Eggertsson T., Furubotn E., Richter R. and numerous others continue their investigation of institutionalism.

No matter the variety of views and approaches, the concept of institutionalism possesses specific systemic features. It examines certain elements and their interaction in a linkage, connected with the research of economic objects and processes in correlation and in interdependence. The main concept of institutionalism is the examination of economic factors and their dependence from the environment, where they function. This environment consists of institutions in a wide sense, e.g. of the totality of formal and informal norms or principles, followed by individuals in a certain community. The totality of officials, administrative or public organizations belongs to the institutes, which favor formation of the structure of this environment. Neoinstitutionalism also takes into account the evolution of institutions, what changes the conditions of economic life and the influence of economic life on these institutions.

Institutionalism differs from liberalism in its view of the role of the state in a modern economy. Without the active participation of the state, institutionalism believes that it is impossible to form an effective market environment. "Under the influence of the rational activity of individuals", the Ukrainian experience shows that this does not occur. An institutional market environment forms effective institutes in conditions of goal-oriented managing functions of state, which should also favor the development of the agricultural sector. The reformation process in the Ukraine confirms the important role of the state.

The importance of using concepts of institutionalism at the beginning of the modern stage of reformation of the Ukrainian economy, including the agricultural sector, was caused by the need to create effective institutions and to change the institutional structure of a society and an economy. The creation during the reformation years of "pseudo" market elements, the rise of which was caused by institutional instability on a macro level, led to opportunistic behavior on the part of economic agents. The rise of significant price and financial disparities is one of the disproportionate elements on the macro level, which subsequently defines the behavior of subjects on the micro level.

It is important in this context that the borrowing of the prepared institutional matrix with the different in quality institutional environment occurred, followed by its implementation on an unprepared ground – mental, organizational-production, etc. The hypothesis about the spontaneous development of the market behavior and market institutes in the agricultural sector does not justify itself. Conditions of institutional conflict are still being formed.

Simultaneously, no doubts arise considering the expedience of a market economy implementation. Schumpeter J. (1942) said that there is no institution

more democratic than the market. The questions are only in the forms and mechanisms of such implementation and in an institutional model, which must be built considering national peculiarities.

Restructuring of the Ukrainian Agricultural Sector

When analyzing transformation processes in the Ukrainian agricultural sector, one assumes that there is no need for principle reforms because in the Soviet system this sector was private. But, it was private only in formal sense. In reality it was state property – with state plans, norms of centralized supply and the purchase of agricultural product at state prices, etc. It may look paradoxical, but reforms in the agricultural sector moved forward at the slowest rate, compared to other sectors of the economy. This was caused by conservative attitudes, lesser initiative, the inability to engage in entrepreneurial behavior, the paternalistic moods of village residents, and so on.

The use of principles of institutionalism within agriculture is based on the vector of agricultural reforms in the context of their general strategy, including the totality of factors and conditions. Institutional theory is oriented mostly to an evolutionary approach, which better suits the agricultural sector. Difficulties with the transformation process in the Ukrainian agricultural sector have been caused by attempts to apply radical methods with institutions that are inherently conservative in nature – the village and its system. Institutional environment in the village was forming during a long time, its roots originating in the community system.

A period of dominance for collective farms brought socialization to its height, imposing informal norms of stereotypical behavior, a mode of life, values, etc., which generally define the mentality of villagers (Lopatynskyy, 2002).

Unlike formal norms, changes of informal norms do not happen simultaneously, but need more time, something that must be taken into account in the process of agricultural transformations. As North D. (2000) says, “official rules may change in just one night as a result of political or judicial decisions, but unofficial restrictions, linked with habits, traditions and codes of behavior, suffer much less from the influence of goal-oriented policy. These cultural restrictions do not only connect past with present and future, but give us the key to an explanation of the way of historical change”.

The volume of production decreased by half during the crisis of 1991-1999. Both quantitative and qualitative measures of agricultural production worsened – crop capacity, the productivity of cattle, and financial results.

As Lukinov suggests (2002), the agricultural sector must be exclusively reformed by creative, anti-inflationary methods with the use of criteria-graded systems measuring the impact of social effect growth, modern theories and models of an effective reformation with the draw of necessary internal and ex-

ternal investments. The strategy for the stable economic development of agriculture must provide a planned process for reproduction, environmental preservation and defense, resource potential, and the increase of human welfare. The usage of state and market regulators in economic development plays an important role in the reformation of agriculture in their optimal combination.

The role of the state in the Ukrainian agricultural sector may be characterized by the next example: restructuring and strengthening of reforms were started with the statement of the President of Ukraine (1999), i.e., market transformation processes were initiated by the command from the top. Nevertheless, this brought positive changes – the sharing of land and real estate on the principles of private property; peasants got the right to receive real land and to leave collective farms; the right for land was stated by laws, etc. The collective property on land came to an end.

Structural changes in the agricultural sphere caused significant growth in the volume of agricultural production in 2000-2001, but in 2002 the growth rate fell significantly. Cycle changes occurred – an increase in the harvest caused prices to drop and in turn, so did the income of producers. Distribution prices on the processed products did not change in a comparable fashion. Resource prices, supplied to the agricultural sector, remained constant or increased. Price discrimination of agricultural producers was caused by the absence of a favorable external market environment, because the agricultural sector was characterized by almost free competition.

This situation raises the question of the need to increase state support of the agricultural sector of Ukraine. Agricultural support takes several forms, and the levels of support vary greatly across the countries. They are the most prevalent, however, among the world's industrial economies. The Organization for Economic Cooperation and Development estimates that direct and indirect transfers from consumers and taxpayers to farmers in member countries totaled over \$230 billion in 2001, comprising nearly a third of all farm receipts. Support levels range from a low of 1 percent of farm receipts in New Zealand to a high of 69 percent in Switzerland. Japan, Korea, and Norway are also close to the high end of the range, while support levels in Canada, the United States, and the European Union fall somewhere between two extremes at 17 percent, 21 percent and 35 percent, respectively (Pakko, 2003).

Characterizing the level of support of the agricultural sector in Ukraine, one should note, that 33 percent of expenditures of a state budget in 1990 supported agriculture and its social sphere; the percentage of the state budget for agriculture and development of villages did not exceed 3.5 percent.

A recent International Monetary Fund study calculated that the potential gains of eliminating all agricultural support, in both industrial and developing countries. Worldwide, total potential benefits would be \$128 billion, over 0.4 percent of total world GDP (IMF, 2002). But according to 2002 results, the

specific percentage of bankrupt Ukrainian agricultural enterprises reached 42 percent¹. This underscores their need for state support. The situation has improved compared to the second half of the 1990's, during which the agricultural sector was in almost total bankruptcy.

Further liberalization of the agricultural sector in Ukraine would be unnecessary, if the connected sectors were functioning at market principles under the conditions of a free market. In such conditions there is no doubt of the necessity of vertical integration of agriculture, as a way to improve both the financial results of the agricultural sector and the mutual interest of all members of the product chain. But the implementation of such vertical integration, again, is not basis on market mechanisms through the initiative of producers (agents of production – distribution relations), but rather by the initiative of government, according to the Complex Program of the Development of the Agricultural Market in 2003-2004. This Program forecasts the creation of structures which unify farmers, the processing industry, and various distribution agencies. The government also plans to structure the agricultural market by creating or widening the network of agro - trade houses, agricultural servicing cooperatives, credit unions, which, in turn, will stimulate agro- enterprises to participate in the exchange of free trade. The implementation of these measures, the government believes, will increase the effectiveness of the agricultural market as a system, and will provide stable growth for agricultural products. This suggests that market changes will be implemented by administrative methods. We recommend this be done because market principles of self-organization do not work, and an internal agricultural market with an effective infrastructure cannot be formed.

Simultaneously, the concept of agricultural reforms must have a development orientation, that is, clearly defined institutional frames (institutional matrix). This should favor the decrease of chaotic fluctuations, which deals with the number of producers, volumes of production, prices, etc. Institutional changes occur from the pressure brought to bear by interested institutions on one side, and uninterested institutions on the other. Sabluk (2002) believes that the modern state of the agricultural sector – is an unstable compromise, defined by the present schedule and the correlation of these forces. Under these conditions agricultural production is innovative and investment unattractive, the structure of the economy is distorted and priorities are given to the service industries, rather than production industries. This lack of perspective is disastrous for the state.

In order to start a balanced and dynamic development, it requires the creation of strategy for agricultural transformation. This requires that one work

¹ Ministry of Agricultural Policy of Ukraine. –
<http://www.minagro.kiev.ua/stat/Sg2003.01.01.php>

up from the present situation, rather than look for ways to return to a certain initial position. Work on the questions of how to transform the agricultural sector of the Ukraine, is being done by scientists of the Institute of Economy of the National Academy of Sciences of the Ukraine and the Institute of Agricultural Economy of the Ukrainian Academy of Agricultural Sciences (Lukinov and Sabluk, 2000), and numerous of others.

Conclusion

The use and implementation of the concepts of liberalism and institutionalism as applied to economic and agricultural transformation of the Ukraine, must occur synchronically, considering both the perspectives of the liberal model and the conditions needed for effective implementation of market institutions – as formal rules and informal restrictions so there are certain characteristics of compulsory to the execution of both.

The stability of an agricultural economy is determined by several factors, including low or at least stable inflation expectations, relatively low interest rates on the average; and high and stable employment. The reality is that the fundamental economic forces, controlling the destiny of agriculture, – the growth of productivity, natural risks, low prices and income elasticities of demand, and instability of conditions at the important export markets – are things that the Fed can do nothing about (Kliesen and Poole, 2000).

The main directions of agricultural transformation nowadays, in our point of view, are:

- 1) the transformation of the organizational structure of the agricultural sector and
- 2) the formation of social, economical and political conditions pursuant to the realization of a reformation strategy in the village.

The first direction is system-creating in the context of the formation of an agricultural institutional matrix; the second one belongs to the external environment – institutional conditions necessary to realize reforms. The agricultural sector model must be concrete, not abstract; so, there should be mechanisms for the practical manifestation of theoretical concepts. One may evaluate transformation only by the final result, which must appear through stable and profitable agricultural production and growth in the standards of living of village residents. Such conditions would confirm the effectiveness of the model of economy for the agricultural sector.

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Streszczenie

PODSTAWY KONCEPCYJNE REFORM UKRAIŃSKICH I ICH POWIĄZANIE Z SEKTOREM ROLNICZYM

W okresie niepodległości Ukrainy studiowano istotę transformacji rynkowej, jej poszczególne etapy i komponenty. Jednakże, jak dotąd, nie przeprowadzono badań podstawy teoretycznej zmian i koncepcji dalszego przekształcania gospodarki narodowej. Niniejsza praca podejmuje pierwszą próbę zbadania różnych teorii naukowych odnośnie przekształceń gospodarki ukraińskiej. Następnie omawia szczegóły reform w rolnictwie. Część końcowa przedstawia kierunki koncepcyjne rozwoju ukraińskiej gospodarki przejściowej na przykładzie sektora rolniczego.

THE PERSPECTIVES OF UKRAINIAN-ROMANIAN COOPERATION ON THE BASIS OF THE USE OF NATURAL RESOURCES OF THE BASIN OF THE RIVER SIRET

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The Ukrainian part of the basin of the river Siret occupies 2,2 thousand kilometres². About 113 thousand people live here, including: in Putyla region – 3,5%, in Vyzhnytsya region – 16,9%, in Storozhynets' region – 50,3%, in Hlyboka region – 29,3%.

Methodological substantiation of the problems of economic-geographical NRP study is, in concentrated form, observed on three levels – essence-analytical, systems-functional and organizational-applied. The first provides for definition of the essence of economic-geographical NRP analysis and synthesis, their goals and the ways of their solution. The second level of study proceeds from the conception that NRP is an integral object, whose development is directed by the joint influence of both natural and social regulations, and the regularities in interaction between the nature and the society. And, finally, the third level presupposes that theoretical models of the object find application in practically significant developments, thus marketing a base for scientifically organized system of regional nature utilization. Here it becomes evident that NRP lies as the basis for the development of human society. This is why we understand nature utilization as a system of social measures, aimed at study, assimilation, rational utilization, protection and reproduction of territorial (aquatorial) NRP, while deepening of study and assimilation, as well as improvement of utilization, protection and reproduction of NRP are the economic-geographical content of rationalization of nature utilization.

The development of major evaluation aspects, namely – matter, territorial and temporal ones lie among the most important methodological problems. Of weighing significance, in the arsenal of geographical approaches towards NRP evaluation, are: search for the ways of definition of potential productivity of the resources; choice of optimal territorial units for evaluation; improvement

of the component evaluation of the potential, as well as of its systems-structural analysis, cartographic modeling, natural resources regionation and future development prognosis.

The automated NRP data banks (DB) are the major base of geographical information systems of nature utilization. They are considered as the computer-based complexes for automation, manipulation and display of statistical, departmental and cartographic modeling, natural resources regionation and future development prognosis.

The automated NRP data (DB) are the major base of geographical informational systems of nature utilization. They are considered as the computer-based complexes for automation, manipulation and display of statistical, departmental and cartographic information. The DB themselves base on the totality of elementary informational units – requisite parameters, which characterize the levels of data generalization in territorial aspects, as well as the types and subtypes of informational massive, initial documents and their temporal parameters.

The noticeable tendency of present stage of scientific search is that towards the formation of new approaches to NRP evaluation, which can be proved by and seen from: widening of the range of evaluation methods; substantiation of NRP evaluation through absolute (not relative) productivity of natural resources; regionalization of the estimates by economical, social and ecological criteria of socio-territorial complexes development.

The criterion of social labor economy corresponds to the utmost, when utilizing natural resources, to the production efficiency and specificity of NRP absolute evaluation. Among the evaluation parameters (differential rent, differential and net income, costs productivity, etc.), only the “gross production” index can serve as a generalizing parameter, since it characterizes general economical productivity of natural resources and their use value on the whole. It must now be evident that this is only why no difference value can measure the joint productivity of natural resources, despite the fact that it characterizes separate edges of joint productivity. Subject to evaluation is the annual actual, or conventional productivity of natural resources, taking the stock of which is mediated through the possibility of data capture on naturally homogeneous plots. Quantitative expression of the potential of natural resource is defined as its total value in every aspect of its utilization. It is a sum of productions of valued resource unit use value by the resource productivity on the whole territory, suitable for exploitation in every aspect of resource utilization, with consideration of quality coefficients. The resource unit use value estimate is presented in cost indices, calculated by the method of natural resources ranking, whose (resources) assimilation is going on in “worse” conditions and which require additional, but socially justified labor costs. When calculating, specially developed computer programs of the potential evaluation are used.

Specific peculiarities of each natural resource necessitate evaluation of their potential by every type of the resource. Among the major natural resources, studied are mineral, water, land, forest, faunistic and natural recreational resources. Evaluation has been conducted for 505 administrative districts and regions of Ukraine.

Mineral potential of the country covers basic groups of fossils: fuel-power resources, metallic ores, non-ore raw materials for ferrous metallurgy, mining-chemical raw materials, building materials. When calculating, used were: O. Minz's method of fossils ranking of only A + B + C1 categories to the index of their conventional annual productivity; data on actual and normative enterprises capacities; state and regional actual costs. Water resources potential was estimated proceeding from the total economical effect of water utilization in each of major water-consuming branches. Water resources potential is characterized by average annual volume of the local flow, and Belarusian and Russian rivers inflow (excluding Kiliy branch of the Danube River). Land potential calculations base in the results of a large-scale general economical evaluation of all republican lands and were carried on in a uniform system of land cadastre. The potential is reflected by a the 1 hectare average gross production in common state cadastral prices, multiplied by the total area of agricultural lands of administrative districts and regions. Timber resources potential is a production of major forest-forming sorts yearly increase (considering growth place condition types), the forest plot area and the cadastral price of 1 cubic meter of "disindividualized" timber, with introducing its quality coefficients. The by-products use value is estimated based in the yearly exploitation harvest index. The estimates of water protecting and sanitary-hygienic forest functions were defined with the help of "substitution" (or compensatory) costs method. Annual average actual productivity calculations of hunting, fishing and honey-bearing resources predetermine estimates of faunistic potential in Ukraine. Its (potential) annual efficiency is defined through the adopted calculation norms in common state cadastral prices. Recreational potential is defined through the price estimation of free time; the potential of mineral waters and medical mud is based on their balance exploitation stocks and regional (Carpathian) actual costs.

The joint resources potential value calculations and structure definition, namely – NRP calculations in world market prices, on the one hand, and the confrontation of the obtained indices, in particular, structural indices, for international comparisons, on the other hand, is a sufficient methodological basis for substantiation of the significance of the obtained results of NRP cost evaluation (in cadastre prices) within the conditions of the multiple increase of acting prices of real market. The NRP, recalculated with that purpose in USD equivalent, equals to 62 milliard. The share of the most important in the total NRP mineral resources is of 28%, land – 39%, natural recreational – 19%. Despite all

the proximity of the data, which is connected with insufficient elaboration of the methodology of international comparisons, it can not but be pointed out that both the value and the proportion of natural resources in karbovantsi and dollar measurements are preserved within the limits of one order.

The place of natural resources potential of the basin of the river Siret in natural resources potential of Ukraine

Administrative region	Integral natural resources potential	Including potential					
		mineral	water	land	timber	fauna	natural-recreational
I. Quantity of natural resources potential (numerator — %, denominator — million USD)							
Ukraine as a whole	<u>100.000</u> 62450,0	282.558	130.759	443, 839	41.699	4,739	96.406
<i>Chernivtsi region</i>							
The basin of the river Siret	<u>12,703</u> 793,4	<u>0,658</u> 41,1	<u>2,324</u> 145,2	<u>6,35</u> 4 396, 8	<u>1,596</u> 99,7	<u>0,027</u> 1,7	<u>1,744</u> 108,9
The part of natural resources potential of the basin of the river Siret	<u>2,737</u> 170,9	<u>0,021</u> 1,3	<u>0,785</u> 49,0	<u>0,71</u> 7 44,7	<u>0,770</u> 48,1	<u>0,002</u> 0,1	<u>0,444</u> 27,7
in Chernivtsi region, %	21,5	3,2	33,7	11,3	48,2	5,9	25,4
II. Component structure of natural resources potential, %							
Ukraine as a whole	100,0	28,3	13,1	44,1	4,2	0,5	9,5
Chernivtsi region	100,0	5,2	18,3	50,0	12,6	0,2	13,7
The basin of the river Siret as a whole, including within:	100,0	0,76	28,68	26,18	28,11	0,07	16,2
Putyla region	100,0	—	57,3	6,2	28,6	0,03	7,87
Vyzhnytsya region	100,0	2,4	30,5	11,2	44,2	0,07	11,63
Storozhynets' region	100,0	0,43	28,9	29,7	32,6	0,08	8,29
Hlyboka region	100,0	0,29	14,7	41,8	10,4	0,07	32,74
III. Geographical variety of natural resources potential							
Ukraine as a whole	1,974	0,514	0,383	0,521	0,186	0,038	0,322
Chernivtsi region	1,959	0,216	0,445	0,500	0,383	0,018	0,397
The basin of the river Siret	2,007	0,050	0,514	0,503	0,507	0,010	0,423
IV. Territorial differentiation of natural resources potential, %							
The basin of the river Siret as a whole, including within:	100,0	100,0	100,0	100,0	100,0	100,0	100,0
Putyla region	25,5	12,7	0,1	3,0	13,0	5,5	6,1
Vyzhnytsya region	23,7	22,3	70,2	9,6	34,9	21,3	16,0
Storozhynets' region	35,7	35,5	20,7	40,3	41,1	43,7	18,2
Hlyboka region	15,1	29,5	9,0	47,1	11,0	29,5	59,7

Size, component structure, geographical variety and territorial differentiation of natural resources potential (NRP) of the basin of the river Siret were evaluated by the author. Natural resources potential is characterized by joint efficiency of mineral, water, land, timber resources, fauna and natural recreation resources (see Table).

The obtained results show that natural resources potential of the basin of the river Siret in its average annual calculation allows obtaining 170,9 million USD of total volume of agricultural output of the usage of natural resources. That makes up about 22 % of index in Chernivtsi region. Occupying about ¼ of the area of the Northern Bukovyna, this region at the same time concentrates about 48 % of timber, 34 % of water and 25 % of natural-recreational potential of the territory. The part of land potential of the river Siret in its general regional index accounts about 11 %, mineral – 3 %, fauna – about 6 %.

It is of great importance to reveal the differentiation of the natural resources potential of the basin of the river Siret of the separate administrative districts of the region. The greatest and most important are the natural resources of Storozhynets' region – 35,5 %, Hlyboka region – 29,5 %, Vyzhnytsya region – 22,3 %. The least natural resources potential – in Putyla region – 12,7 %. If in general in the basin of the river Siret mostly water-timber-land natural resources potential is formed; then within Putyla region – water-timber-recreational; Vyzhnytsya region – timber-water-recreational; Storozhynets' region – timber-land-water; Hlyboka region – land-recreational-water.

The major trends of the Ukrainian-Romanian cooperation in the basin of the river Siret are: ecological-economical adaptation of the structure of economic complexes; general economy of natural resources potential; the highest possible use of secondary resources; state support of nature preservation.

Streszczenie

PERSPEKTYWY WSPÓŁPRACY UKRAIŃSKO-RUMUŃSKIEJ NA PODSTAWIE UŻYTKOWANIA ZASOBÓW NATURALNYCH W DORZECZU RZEKI SERET

Na początku swojego artykułu Autor podaje dane geograficzne opisywanego regionu. Następnie prezentuje metodologię badań. Z kolei, w oparciu o podane kryteria: społeczno-gospodarcze, geograficzno-terytorialne, ekologiczne, potencjał zasobów naturalnych - dokonuje analizy różnych aspektów oceny perspektyw współpracy. Dochodząc do ostatecznych wniosków, że głównymi kierunkami współpracy ukraińsko-rumuńskiej w dorzeczu rzeki Seret są: przystosowanie ekologiczno-gospodarcze struk-

tury kompleksów gospodarczych; ogólne zagospodarowanie potencjału zasobów naturalnych; możliwie najlepsze wykorzystanie potencjału zasobów naturalnych; oraz wsparcie państwa dla ochrony przyrody. Artykuł jest bogato zaopatrzonej w wizualną ilustrację omawianych zagadnień.

PART IV

TRANSBORDER CO-OPERATION

THE FINANCING OF INTERNATIONAL, CROSS-BORDER CO-OPERATION BETWEEN CENTRAL- AND EAST- EUROPEAN COUNTRIES BY THE EUROPEAN UNION

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Introduction

Border areas are considered as underdeveloped because of their peripheral location. They need stimulation. They aren't competitive and attractive for investors because they are located far away from economic and administrative centres. They need assistance because, by themselves, they aren't able to change their situation. Therefore, border areas are considered as special "problem zones", and they are included in regional assistance policy of the European Union. The European Union designed special programs to assist problem zones. There are funds, which will enable the implementation of those programs.

Based on the location of a region, there are several types of border zones in Europe:

1. Border areas within the European Union; after the acceptance of the Maastricht Treaty, the borders between member countries were opened and they ceased to divide Western Europe;
2. Border areas between the Union and non-union countries which are about to become the members, for example, Poland and Germany;
3. Border areas between neighbour countries which are associated the European Union;
4. Border areas between the countries which are associated with the European Union and the countries which won't become members in the near future, for example Poland and Bielorussia;
5. Border areas between the countries which aren't members and are not scheduled to become members in the near future, for example, Bielorussia and Ukraine.

Different support programs were designed for different countries, according to their location:

- for European Union countries – INTERREG;

- for Central and East European candidates – PHARE CBC, and PHARE CREDO.

The border areas of other countries also can use different funds, for example, East and Central Asian countries, which are the members of the Independent Commonwealth and Mongolia, can use the TACIS funds, the Mediterranean countries can apply for the MEDIA funds, and the countries of former Yugoslavia can obtain the OBNOWA funds.

INTERREG

The Interreg fund is one of the four Union initiatives. It is designed to last from 2000 to 2006 (Interreg III). It is broadened, and it is the continuation of previous programs. The goal of the program is the financing of the co-operation in border zones, on international and inter-regional scales, within and outside of the Union. There are three components in the program (A,B,C), and there are five billion Euros to finance the implementation. The gross of the funds goes to Spain, Germany and the Great Britain (table 1). The IIIa component is the largest (67%). It is designed to finance cross-border co-operation. It includes such programs as:

- the promotion of urban, rural, and coastal areas;
- the establishing of new employment opportunities;
- the supporting of small and medium-size business;
- the protection of the environment;
- the improvement of economic and social conditions.

Table 1. Allocation of INTERREG III funds by country EU. Period 2000 – 2006

Kraj	mln Euro	Kraj	mln Euro
UE 15	4 875	Netherlands	349
Spain	900	Austria	183
Germany	737	Finland	154
Greece	568	Sweden	154
Italy	426	Belgium	104
France	397	Ireland	84
Portugal	394	Denmark	34
Great Britain	362	Luxembourg	7

Source: Peters D., 2003, Introduction to INTERREG and managing transition for the 2004-2006 period, European Commission, Warsaw.

Within the IIIa Interreg plan, there are 53 programs scheduled for the period from 2000 to 2006. They are designed to finance cross-border co-operation. The majority of funds will be used to finance the projects along the borders between Spain and Portugal (807 million Euro), Saxony and Bohemia (181

million Euro), Greece and Bulgaria (170 million Euro), Spain and Morocco (169 million Euro), Northern and Southern Ireland (130 million Euro).

When joining the Union, ten new members will receive, according to the Interreg III plan, from 2004 to 2006, over 424 million Euro. Poland will receive 46%, Hungary and Bohemia 14% each, and other countries proportionally less money (table. 2).

Table 2. Allocation of INTERREG III funds for the 10 new Member States. Period 2004 – 2006

Kraj	mln Euro
ogółem	424,4
Poland	196,1
Czech. Rep.	60,9
Hungary	60,9
Slovak Rep.	36,8
Slovenia	21,0
Lithuania	19,9
Latvia	13,5
Estonia	9,4
Cyprus	3,8
Malta	2,1

Source: Peters D., 2003, Introduction to INTERREG and managing transition for the 2004-2006 period, European Commission, Warsaw.

Programming and implementing of the Interreg III has already started. Poland will receive 196.1 million Euro, and 80% of that amount is included in the A component, 14% is included in the B component, and 6% is included in the C component. Cross-border co-operation (component A) will use 149 million Euro, and the money will be distributed the following way:

- Western border – 73 million Euro (24 million yearly);
- Southern border, with the Czech Republic – 15 million Euro (5 million a year), and with Slovakia - 9 million Euro (3 million a year);
- Eastern and North-eastern borders – 52 million Euro (17 million a year).

Within the framework of the A component, Poland will participate in seven programs of border-zone co-operation, including 5 bilateral programs: Poland-Meklemburg Frontal Pomerania, Poland-Brandenburg, Poland-Saxony, Poland-the Czech Republic; Poland-Slovakia; and 2 trilateral programs: Poland-Lithuania-Russia, Poland-Bielorus-Ukraine.

PHARE CBC

The Phare Cross Border Co-operation Program plays important role in creation, supporting and development of cross-border co-operation. The goal of the program is the co-financing cross-border projects, including the areas of Central and Eastern Europe which border the European Union countries (the first edition). The Phare Cross-border Co-operation Program for Poland includes over 26% of the Phare funds distributed by the Union yearly. The Western zone receives the gross of the money. The Phare Poland-Germany program started in 1994. From 1994 to 2004, it contributed to the implementation of 320 projects for over 370 million Euro. In the same period of time, the Baltic states received 28 million Euro.

In 1999, the Phare CBC started supporting projects along Polish southern border, but the funds were rather limited. From 2000 (second edition of the Phare CBC), the Western border zone will receive 44 million Euro, and the Baltic region will receive only 1 million, the Czech zone will receive 5 million Euro, and Slovakian border zone will receive 4 million Euro. The resources will be used to mainly support the following areas: transportation, environment protection, communal infrastructure, economic development and human resources.

The infrastructure, connected with transportation, will continue receiving the gross of funds from the Phare CBC program. From 1994 to 1999, there were 50 projects which used 160 million Euro, i.e. 51% of overall financing for all programs. Implemented investment significantly improved the situation at border crossings (the crossings are more accessible, and they can handle more people and vehicles crossing the border). Also, people who live near the crossings could improve their living conditions, the safety near the crossings is better, and visitors can enjoy new facilities. The development and modernisation of transportation facilities will contribute to the improvement of social and economic conditions, it will influence the competitiveness and attractiveness of border zones. People who live in border zones will be more mobile.

One of the priorities established by the Phare CBC is the improvement of environmental protection. From 1994 to 1999, they implemented, at the Western border, 100 projects for 80 million Euro. Ecological projects not only improved the environment, but, also, contributed to the improvement of living conditions in border zones, and to bringing new industrial and service-oriented investment in the area. As the result of the investment, several poviats and cities have more than 98% industrial and communal sewage systems cleaned. Sewage plants were built and modernised, and currently they comply with the newest technological and technical standards. As the result of many investments, such as the construction of mechanical and biological sewer plants, the quality of drinking water improved, and the level of pollution in rivers decreased. Wa-

ter quality changed, according to chemical and physical standards, and its classification changed accordingly, from class 2 to class 1.

Phare CBC plan plays important role in improving social and cultural conditions. The first edition of the plan contributed to increased activity of citizens and local administration. The human resource sector received 23 million Euro during the first phase of implementation. They spent 4 million Euro to improve the safety of the Western border. Police and border patrol received new equipment. The project included the entire West border zone.

Small Euro-regional projects play equally important role in improving social and cultural conditions. They contribute to better cross-border co-operation. The money from that fund are used to support "social relations". The resources of the fund include little less than 50 thousand Euro. The entire Polish-German border zone includes many Euro-region. All of them can use the Phare CBC resources. The projects include mutual cultural, educational, sports, and editorial projects. An average project received from 3 to 5 thousand Euro. In the "Neisse-Nisa-Nysa" region, they implemented 600 projects. The "Pomerania" and "Lubusza" regions, each implemented 300 projects.

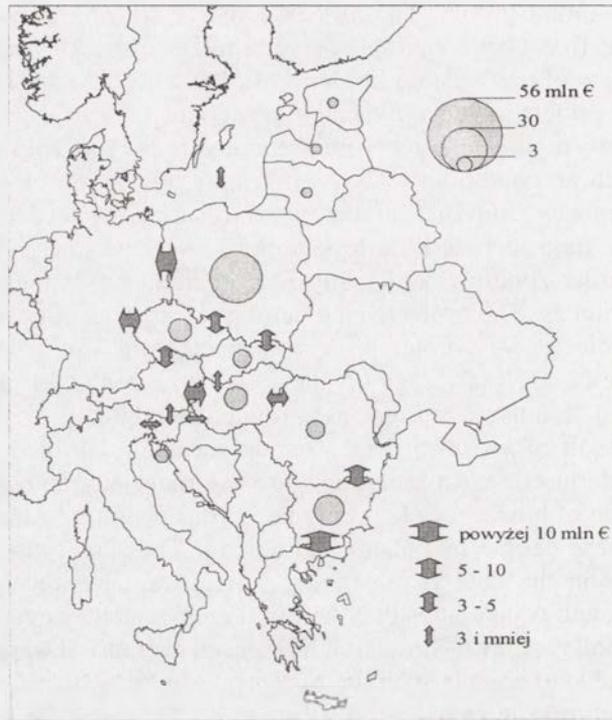
As the result of cross-border co-operation, economic and spatial infrastructure is modernised, and the regions become more attractive and competitive. The location of business in border zone is considered as attractive by more and more business people in Poland and abroad. They hope their investment will bring gains in the near future. Local administration expects the increase of their revenue, and people hope they will find employment. Regions may develop faster, economic and infra-structural differences may fast disappear. Soon, the regions will be able to comply with the European standards, therefore, new business will be even more attracted by investing in border zones. New technologies will be brought to the area, thus further contributing to its development.

The European Commission evaluated the implementation of the Phare CBC programs in Poland. The results of their evaluation were very positive, therefore, the commission recommended the Polish model to other countries included in the program.

The second edition of the Phare CBC started in 2000, and it will be continued to 2006. The territorial range of the plan was broadened. As the result of that decision, the funds can be utilised by different border zones in countries implementing the Phare, and not only the outer regions which border the European Union from the outside. That means the funds can be utilised by the candidates to the Union. In Central and Eastern Europe, the biggest beneficiary in the period of time from 2000 to 2003, was Poland (56 million Euro a year). Poland is followed by Bulgaria (28), the Czech Republic (19), and Hungary (19). The regions included in the Phare CBC plan will receive 163 million Euro a year, and the regions bordering the Union from the out-side, will receive 61% of the funds, and the borders between the countries of Eastern and Central Europe will

receive 32%. The Baltic states will receive 7% of the Phare CBC funds (fig. 1 and table 3).

Fig. 1. Phare – CBC yearly allocations 2000 – 2003 (mio Euro)



Source: PHARE – CBC, European Commission DG Enlargement, Nov. 2002.

Table 3. Phare – CBC yearly allocations 2000 – 2003 (mio Euro)

Country	PhareCBC allocation	EU – Phare borders			Phare – Phare borders				Baltic CBC
		total	per EU border:		total	per CC border:			
Poland	56	44	D:44		9	CZ:5	SK:4		3
Bulgaria	28	20	GR:20		8	RO:8			
Czech Rep.	19	14	D:10	A:4	5	SK:0	PL:5		
Hungary	19	10	A:10		9	RO:5	SK:2	SL:2	
Romania	13	0			13	BG:8	HU:5		
Slovakia	12	6	A:6		6	CZ:0	HU:2	PL:4	
Slovenia	7	5	I:2,5	A:2,5	2	HU:2			
Estonia	3								3
Latvia	3								3
Lithuania	3								3
Total	163	99			52				12

Source: PHARE – CBC, European Commission DG Enlargement, Nov. 2002.

CZ – Czech Republic; RO – Romania; SK – Slovak Republic; BG – Bulgaria; HU – Hungary; SL – Republic of Slovenia; PL – Poland; D – Germany; A – Austria; I – Italy; GR – Greece.

TACIS CBC

In 1991, the European Union started the TACIS program for the following 13 countries of Eastern Europe and Central Asia: Armenia, Azerbaidjan, Bielorussia, Georgia, Kazakhstan, Kirgistan, Moldavia, Mongolia, Russia, Tadjikistan, Turkmenistan, Ukraine, Uzbekistan (table 4). The goal of the program was to support the reforms, to develop rural areas and private sector, infrastructure network, to protect the environment, to develop nuclear safety system (table 5).

Table 4. Tacis funds committed by country 1991 – 1999 (in mio Euro)

Country	Million Euro
Russia	1 274
Ukraine	461
Kazakhstan	112
Uzbekistan	103
Azerbaijan	87
Georgia	66
Moldova	62
Armenia	59
Belarus	57
Kyrgyzstan	50
Turkmenistan	40
Mongolia	29
Tajikistan	8

Source: Report from the Commission the Tacis Programme Annual Report 1999, Commission of the European Communities, Brussels 20.12.2000.

Table.5. Tacis funds allocated by sector 1991 – 1999 (in mio Euro)

sector	Million Euro
Nuclear safety and environment	851
Restructuring state enterprises and private sector development	595
Public administration reform, social services and education	632
Agriculture and food	345
Energy	381
Transport	279
Telecommunications	54
Policy advice	265
Others	241

Source: Report from the Commission the Tacis Programme Annual Report 1999, Commission of the European Communities, Brussels 20.12.2000.

From 1991 to 1999, the European Union spent 4,2 billion Euro on the implementation of the program. Russia received 51%, and Ukraine received 20% of the funds. Regional programs received 28%. Nuclear safety program (the clean-up after the Chernobyl disaster) was most expensive. It was followed by the program of environment protection (20%), the reform of public administration, service sector and education (15%), the restructuring of economy and private sector (14%).

In 1996, the TACIS program was restructured, based on the PHARE sub-programs, and it was re-named the TACIS CBC program. It included border zones of Russia, Bielorus, Ukraine, and Moldavia, whose borders are connected with the European Union and the countries included in the PHARE program. From 1996 to 2000, the Union spent 132.5 million Euro, that is 5% of the TACIS budget. The assistance is mostly utilised to restructure border crossing facilities (48%), environment protection (34%), economic development (7%), administration and social issues (3%).

The TACUS support programs were designed to prepare the beneficiaries for the proper utilisation of the structural funds, therefore the procedures of collecting applications, project selection, and project implementation resemble the INTERREG procedures, which are used by the European Union.

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Streszczenie

FINANSOWANIE WSPÓŁPRACY TRANSGRANICZNEJ PAŃSTW EUROPY ŚRODKOWEJ I WSCHODNIEJ PRZEZ UNIĘ EUROPEJSKĄ

Obszary przygraniczne z racji swego peryferyjnego położenia (i wynikających stąd konsekwencji) uważane są zazwyczaj za regiony nierozwinięte, wymagające aktywizacji. Ponieważ często same nie są zdolne zniwelować zacofania korzystają często z pomocy zewnętrznej. To właśnie m.in. te obszary są przedmiotem szczególnego zainteresowania polityki regionalnej państw Unii Europejskiej. Unia Europejska uruchomiła dla nich specjalne programy i przeznaczyła określone środki na ich realizację.

W zależności od położenia obszarów przygranicznych utworzono dla nich odpowiednie programy wsparcia: dla państw Unii Europejskiej – INTERREG a dla krajów Europy Środkowej i Wschodniej kandydujących do Unii – PHARE CBC i PHARE CREDO. Również pogranicza innych państw mogą korzystać z odpowiednich programów finansowych: 13 państw Europy Wschodniej i Centralnej Azji tworzących Wspólnotę Państw Niepodległych plus Mongolia – z programu TACIS, kraje śródziemnomorskie – programu MEDIA a kraje byłej Jugosławii – programu OBNOWA.

W niniejszym opracowaniu omówiono trzy programy: INTERREG, PHARE CBC i TACIS CBC, przedstawiono cele programów, wielkość środków finansowych na ich realizację oraz beneficjentów

Programy pomocowe obok korzyści w postaci odpowiednich środków finansowych miał przygotować beneficjentów z krajów Europy Środkowej i Wschodniej do korzystania w przyszłości ze środków z funduszy strukturalnych dlatego procedury zbierania wniosków, wyboru projektów ich realizacja są zbliżone do procedur w programie INTERREG obowiązujących w UE.

EUROREGIONS AND REGIONAL DIVERSITY OF THE POLISH EASTERN BORDERLAND

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Region vs euroregion

Regional transboundary integration is an interdisciplinary problem which is of great interest to many lawyers, economists, scholars of culture and political studies. It is becoming the focus of work for many geographers also who particularly concentrate on the problem of defining the borders of the euroregion and how it functions. The term euroregion contains one of the “fundamental geographical concepts” (A. Miszczuk 2003), namely region.

Ever since the publications by Thunen (1826) and Christaller (1933) the issue of region is the object of polemics and controversy, not only among geographers. There has been a vast body of literature devoted to this issue and the number of proposed definitions of region is, in fact, almost impossible to count. It was in 1957 when G.H. Kimble observed that attempts to “hunt the region” led to establishing over 100 definitions of this notion. Since then, more works have been published that have revealed often extreme attitudes towards region from strong support to those rejecting any scientific value of this notion whatsoever. However, arguments presented in the discussion are at times a result of emotions rather than logical reasoning. It has been said that region is an ideologically marked notion (D. Harvey 1973). Among Polish geographers Z. Rykiel (2001) points out that “opinions with regard to regionalization (...) might have been a result of loyalty felt towards the state authorities”.

The notion of the region understood as an objectively existing reality has provoked different kinds of criticism. Physico-geographical regionalization is challenged by the claim that “appropriate manipulation of the choice of appropriate physical-geographical moments (...) makes it possible to build the geographical base of any freely selected geographical unit (A. Piskozub 1970).” In response to the concept of dividing Poland into geographical regions (M. Janiszewski 1959), S. Berezowski (1964) firmly criticized the notion of region writing that “Geographical region is not a fact existing in reality. It is, of course,

possible to write about different non-existent notions but they can hardly be found scientific." Among critical opinions on region the predominant claim is that it is hard to offer clear, transparent regionalization criteria even for homogenous entities. The majority of cases are complex entities which leaves the author of the concept a lot of freedom for subjectivity. Moreover, difficulties in estimating the critical value of factors taken into account in the process of regionalization result in the unrestricted marking borders of a region

On the other hand, there are numerous enthusiasts of geographical regionalization, such as an unquestionable authority in that field, J. Beaujeu-Garnier (1971), who argues that the "object of geography is to discover spatial structures based on connections between environment and the nature and efficiency of human activities.

Presenting the variety of views on the significance of region aims at proving how difficult it is to define the significant scope of euroregion. One might say that euroregion is a natural heir to region in terms of definition. It is also of great importance that the concept of euroregion, besides its vagueness coming from the lack of consensus on the definition of region, evokes negative feelings of different kinds. Euroregion is sometimes perceived as a form of economic expansionism and removing borders. Most often the significant scope of transboundary region is considered to be the origin of the definition of euroregion. The latter is defined as a homogenous geographical entity possessing a common cultural heritage (J. Bukowska-Floreńska 1993). This definition is sometimes supplemented with the information that there must exist an institution appointed by neighbouring countries to administer the region.

In the abovementioned definitions, the phrase "homogenous geographical entity" may arouse controversy. If we limit our discussion to the Polish eastern borderland, the existing Euroregions seem to contradict this claim due to their size. The largest of the Euroregions covers an area of more than a half of Poland's territory. The Bug Euroregion is more or less the size of Austria. Given that, it is difficult to discuss any homogenous features of such large territories.

Euroregions of the eastern borderland

A closer examination of the the Euroregions' borders of the eastern borderland will reveal another fact contradicting their geographical homogeneity. Many borders are delineated along rivers (some of them being main rivers). For example, the north border of the Niemen Euroregion follows, in places, the course of the Niemen River while the south border follows the course of the Bug River. In the territory of Ukraine, the border of the Karpaty Euroregion stretches from the border with Romania along the Dniestr River as far as the environs of Stansisławów. Marking anthropogenic borders along rivers has been strongly criticized by geographers for a long time. In the 19th century Miec-

znikow (1898) claimed that “river – the feeder makes people join their forces in solidarity.” Over 100 years ago E. Romer (1901) presented many arguments proving that a “river is not a natural border.” A similar tone can be found in J. Barbag’s (1974) writings: “Rivers which used to divide in the past are a unifying rather than separating factor in the present. The river valley makes up a natural geographical unit.” Dividing it with a Euroregional border is an obvious mistake. It contradicts the basic rules of water management in regions where water plays an important role in the economy as in the use of hydromechanical structures (A. Szymonowicz, 1976). Borders of Euroregions delineated along rivers, the valleys of which are the abovementioned “natural geographical entities” point to the lack of focus on the regional diversity of these areas. They make it difficult to coordinate protecting water from contamination, flood control, etc. This state of affairs is all the more surprising in a situation when international law experts strive to legalize the notion of an “international river basin.” Its shortest definition is: “an area stretching over the territory of two or more countries limited with a water divide”(A.H. Garretson, R.Hayton 1967). It is striking that no euroregional border was marked along a water divide which would facilitate water management.

The most extreme examples of that policy which has little to do with ‘geographical homogeneity’ but is characterized by ‘geographical nihilism’ occur where borders of euroregions stretch across the territories of national parks. For instance, the border of the Niemen Euroregion splits the territories of Bialowieski National Park (on the Belarusian side of the border), Aukstacija, which is one of the largest Lithuanian national parks, and Biebrzanski National Park (on the Polish side of the border).

Abovementioned examples of euroregional borders contradict declarations included in the statutes of euroregions. They appear e.g., in the founding act of the Trans-border Union of the Niemen Euroregion where protecting environment in its territory is mentioned as one of its goals.

“Problem regions”

The regional diversity of the Euroregions in the Polish eastern borderland because of their substantial size has already been mentioned. In other territorial units of this size (e.g. in countries) administrative, and other divisions facilitate their management. There also exist such divisions within Euroregions but their courses are not adapted to facilitate transboundary cooperation. Nevertheless, implementing another form of regionalization to attain aforementioned objectives would be, in St. Thomas Aquinas’ words, “creating beings when there is no need”. Taking regional diversity into account, especially with regard to nature, is obvious and essential for transboundary cooperation. W. Malendowski and M. Ratajczak (2000) rightly claim that “eastern borderland is slowly be-

coming a field of cooperation". However, the cooperation in question does not develop easily but in diverse natural conditions the proof of which lies in the geographical regionalization of Poland (J. Kondracki 1998). Crucial differences between those regions may be a basis for defining areas which might be termed "problem regions". Obvious candidates for inclusion in this group are areas of environmental protection, both existing and potential. Among existing ones, national parks divided by state borders are prominent. A policy of agreement on conservation measures as well as on the function of the parks not intended directly for environmental protection would be of crucial significance. The key issues are the rules of tourism economy, the course of traffic routes, etc.

There is a great deal more to be achieved with respect to defining and legally sanctioning potential territorial units of environmental protection. It was ten years ago when the Institute of Environmental Protection together with the Institute of Tourism made an attempt to catalogue potential candidates for inclusion in the aforementioned category. The outline of this concept was presented in the paper: "System of transboundary units of environmental protection having a leading tourist role in the eastern border region". "Tightening cooperation with regard to environmental protection and tourism between Poland and its eastern neighbours" was found to be the major goal. Defining the scope of activities between traditionally colliding environmental protection policy and tourism is a valid reason to describe these areas as "problem regions".

Of course, one must not forget about impediments in implementing such a policy. For instance, the current situation around the eastern Polish border, which is crossed mostly by people who have very little to do with tourism.

A perfect example of a "problem region" is a "transboundary" belt of lake districts in Polesie. There is Pojezierze Łęczyńsko-Włodawskie on the Polish side of the border and Pojezierze Szackie in Ukraine. The former includes 65 lakes of the surface area larger than 1 ha with total area of 2,727,000 ha. On the east side of the border there are 25 lakes of that kind, among them the largest one, Świtez, of 2750 ha. The peculiarity of the natural environment in this region points to the importance of transboundary management there.

A very important element of the landscape of the Bug Euroregion are peat bogs occupying vast areas of Polesie. In Wołyn District alone, swamps and peat bogs take up as much as 20% of the area. The largest peat bogs on the Polish side are Krowie Bagno, Bagno Bubnów, and, Imięty Łny. Many of those have already been drained but the remaining ones play an important role as reservoirs and stabilizers of the level of ground waters. Realizing this very function of peat bogs on both sides of this border necessitates its designation as a "problem region" which would be the object of interest for the Euroregion authorities.

"The problem region" of health resorts in Podkarpacie (Iwonicz, Rymanów on the Polish side, Truskawiec on the Ukrainian side, and, Horyniec and

Szkoło on both sides of the border) is a specific one, since no territorial integrity is preserved. Cooperation may include exchange of innovations and patients.

Forest complexes split with a state border in the Euroregions of the eastern borderland stand out as perfect candidates for “problem regions”, too. It is impossible to overestimate the value of coordinated policy with regard to pests or fire protection, etc.

There are other numerous examples of transboundary “problem regions” which might interest Euroregion authorities. Not only are they a result of the abovementioned regional diversity but also of the aesthetics of local landscapes. In a photographic album entitled “100 most beautiful Polish landscapes” prepared by two geographers (K. Ostaszewska, W. Lewandowski 1999), 25 of them are to be found in the east of Poland. There are also counterparts on the east side of the border. Their preservation and protection is a task for Euroregion authorities.

The essence of undertaking actions in “problem regions” is that most euroregion development plans refer to given spheres of economic and social life without allowing for diversities in natural environment in the particular region. This attitude towards economic stimulation and transboundary cooperation may result in irreparable losses. This is particularly true in the situation where hitherto neglected regions become the object of interest for both local and foreign investors whose investments are not always in harmony with the specificity of natural environment and the interest of local inhabitants.

Summary

The following are to be considered essential for efficient transboundary cooperation within the Euroregions of the Polish east borderland:

- correction of their borders so that they would not hinder carrying out major statutory tasks of a euroregion. They should not go along rivers or split territorial units of environmental protection, compact forest complexes, or the areas of peat bogs, and the like. In most cases, euroregion borders should agree with borders of physico-geographical regions or water divides.
- environmental complexes lying near the border should be brought into focus. They are usually the least modified through human activities.
- defining “problem regions” and coordinating actions in these areas should become a crucial element of transboundary cooperation and management in Euroregions.

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Streszczenie

EUROREGIONY I ZRÓŻNICOWANIE REGIONALNE POLSKIEGO POGRANICZA WSCHODNIEGO

Przewodnią myślą opracowania jest ukazanie zależności pomiędzy przyrodniczym zróżnicowaniem regionalnym euroregionów wschodniego pogranicza Polski a ich rozwojem gospodarczym i efektywną współpracą transgraniczną. Śledząc dotychczasowe plany i poczynania w euroregionach dostrzegamy szereg konkretnych i pozytywnych działań. Jednak w niewystarczającym stopniu uwzględniają one zróżnicowanie środo-

wiska przyrodniczego tych terenów. Należy ono do najmniej przekształconych przez człowieka w tej części Europy. Za konieczne dla efektywnej współpracy euroregionalnej należy uznać korektę przebiegu ich granic – zgodną z uwarunkowaniami przyrodniczymi. Niezbędne jest wydzielenie w obrębie euroregionów transgranicznych „regionów problemowych”, tj. terenów o cennych i specyficznych cechach przyrodniczych, aby prowadzić tam skoordynowaną i nieuciążliwą dla środowiska działalność gospodarczą lub zachowawczą.

РЕГИОНАЛЬНОЕ ПРИГРАНИЧНОЕ СОТРУДНИЧЕСТВО В СИСТЕМЕ МЕЖДУНАРОДНЫХ СВЯЗЕЙ РЕСПУБЛИКИ БЕЛАРУСЬ

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В развитии системы интеграционного сотрудничества всё большее значение приобретает диверсификация его форм и направлений. Анализ динамики развития данного процесса в странах ЕС и Центрально-Восточной Европы убедительно свидетельствует о возрастающем значении межрегионального сотрудничества, одним из главных направлений которого является сотрудничество приграничных регионов, прошедшее за последние пятьдесят лет путь эволюции от первичных простейших видов связей сопредельных регионов до самостоятельного, всё более чётко выраженного направления их интеграционного взаимодействия.

Выступая в качестве локальной формы разделения труда, объекты которого расположены на относительно узкой территории по обе стороны государственной границы, приграничное сотрудничество представляет собой, с одной стороны, существенный резерв для экономического развития приграничных регионов, с другой стороны – способствует интенсификации интеграционных процессов на межгосударственном уровне.

Развитие приграничного сотрудничества весьма значимо для Республики Беларусь, как европейского государства, с точки зрения её вхождения в формирующееся общеевропейское экономическое, информационное и культурное пространство, преодоления кризисных явлений в экономике и успешного её трансформирования.

Исторически положение вблизи государственных границ бывшего СССР сдерживало экономическое развитие Беларуси. В первой половине XX века опасный со стратегической точки зрения барьерный характер границ СССР стимулировал преимущественное размещение производства в центральных районах страны. Периферийное экономико-географическое положение западного приграничного пояса, в который входила

практически вся территория Беларуси, коренным образом изменилось после Второй мировой войны в связи с формированием Варшавского военно-политического блока и системы СЭВ. Приграничный статус в это время приобрели территории вдоль белорусского участка советско-польской границы. С развитием экономических связей в рамках СЭВ изменился и характер отношений между ними в целом и их приграничными регионами в частности. Здесь прошли многочисленные транспортные и коммуникационные артерии. Эти территории стали трансформироваться в зону контакта территориальных хозяйственных структур сопредельных государств, а их отдельные участки в своего рода интеграционные мосты, что открыло возможности для налаживания более тесных и действенных международных контактов в различных сферах.

С распадом СССР и образованием Республики Беларусь, её приграничный пояс стал значительно масштабнее. Так, если в составе СССР статус приграничных имели две области Беларуси – Брестская и Гродненская и шесть их административных районов, то после распада СССР, пять из шести областей страны приграничными, а сорок четыре их административных района примыкают непосредственно к государственной границе.

Общая протяжённость границ РБ составляет 2899 км. Республика граничит с пятью государствами: Россией – на протяжении 990 км, Украиной – 975 км, Польшей – 329 км, Литвой – 462 км, Латвией – 143 км.

Российско-белорусская приграничная зона (в разрезе административных районов) является самой большой по размерам (31,7 тыс. км²) и многочисленной по количеству образующих её административных районов – 20, здесь проживает 996,6 тыс. человек, средняя плотность населения составляет 31 человек на 1 км².

Вторым по протяжённости является белорусско-украинский участок государственной границы. Белорусско-украинская приграничная зона состоит из двенадцати административных районов. Она вторая по размерам после белорусско-российской и третья по численности проживающего там населения, уступая белорусско-российской и белорусско-польской приграничным зонам. Средняя плотность населения составляет 35 человек на 1 км².

Белорусско-российская и белорусско-украинская границы относятся к «новым» постсоветским границам. Новые границы в значительной степени угнетающе действуют на экономическое развитие приграничных регионов, что обусловлено действием платёжных и таможенных барьеров на пути как сложившихся в период существования СССР, так и формирующихся товаропотоков.

К настоящему времени на постсоветском пространстве сложились особые условия для интеграционного взаимодействия государств и их

регионов. В период существования СССР интеграционное взаимодействие союзных республик выражалось в создании единого народно-хозяйственного комплекса, основанного на господстве государственной формы собственности, формируемого и управляемого из одного центра. Схема производственной специализации и кооперирования, их уровень и эффективность определялись требованиями командно-административной системы, интересы отдельных регионов и предприятий при этом, как правило, не учитывались.

Образование суверенных государств, ориентированных на рыночное развитие экономики, предопределило распад единого народнохозяйственного комплекса СССР, что обернулось значительными экономическими потерями, связанными с разрывом хозяйственных связей. Это в совокупности с системным экономическим кризисом предопределило падение объёмов торговли между постсоветскими странами. Причём, общее сокращение внешнеторгового оборота каждой страны в большинстве случаев не компенсируется его наращиванием за счёт стран дальнего зарубежья.

Следует отметить, что реинтеграция ставших независимыми национальных хозяйств в единый комплекс, даже на рыночной основе уже вряд ли возможна. Можно говорить лишь о создании экономически однородного поля деятельности для субъектов хозяйствования расположенных на территории постсоветских стран. Такая однородность обеспечивается минимумом таможенных, валютно-финансовых, налоговых препятствий для товаропотоков, трудовых, туристских, других миграций и т.п. Фактически стремление к такой однородности – одна из черт современного интеграционного процесса. При этом разница между интеграцией в рамках СНГ и интеграцией, например, в рамках ЕС или НАФТА заключается в том, что в последних она является завершающим этапом объединения на уровне частного сектора. Создание же однородного экономического пространства на территории стран СНГ должно по идее облегчить первоначальный доступ субъектов хозяйствования друг к другу.

Особую роль в данном процессе должны играть приграничные регионы. Именно в них сложились сегодня необходимые для этого предпосылки:

- экономическая и технологическая однородность хозяйств, их технологическая и подетальная специализация в промышленности;
- совпадение задач по рыночным преобразованиям;
- транспортная доступность.

С точки зрения выше отмеченных обстоятельств в совокупности с наличием общего таможенного пространства Республики Беларусь и Российской Федерации, благоприятными ландшафтными условиями их

пограничных территорий, облегчающими трансграничные взаимодействия транспортно-коммуникационного характера, белорусско-российское пограничье на данный момент находится в более выгодном положении по сравнению с другими участками белорусской границы. Однако сохранение таможенного контроля, неурегулированные вопросы взимания акцизных платежей и налогов на добавленную стоимость, фактическая «прозрачность» границы, способствующая контрабанде отдельных групп товаров, нелегальным миграциям и развитию на этой почве трансграничной преступности, относятся к числу факторов, препятствующим цивилизованным связям приграничных регионов. Общая картина усугубляется неблагоприятными ландшафтными условиями Полесья и заражённостью значительной части территории белорусско-украинского пограничья радионуклидами.

Важнейшее значение, с точки зрения выхода к морским портам, доступа к новым транспортным артериям, альтернативным источникам поставки энергетических и сырьевых ресурсов, новым рынкам сбыта продукции, имеет сотрудничество Беларуси с государствами Балтии – Литвой и Латвией.

Белорусско-литовско-латвийская приграничная зона включает одиннадцать административных районов в составе Витебской и Гродненской областей. Размер данной зоны в разрезе административных районов составляет 21,3 тыс. км², где проживает 475,8 тыс. человек. Средняя плотность населения – 22,3 человека на 1 км².

С распадом СССР экономические связи между РБ и прибалтийскими государствами были сведены практически к нулю. Нарастающие различия политических и социально-экономических моделей развития также ухудшают возможности взаимных экономических связей. На уровне приграничных территорий это усугубляется довольно жёстким таможенно-тарифным контролем. Возникновение политических и экономических барьеров между РБ и прибалтийскими государствами угнетающе подействовало на грузо- и пассажиропотоки в пограничной зоне, во многом изменив их направленность и структуру. На уровень взаимоотношений между Беларусью, Латвией и Литвой, вероятно, повлияет факт вхождение двух последних в ЕС, и последующее за этим усложнение (ужесточение) таможенно-тарифной и визовой политики.

В тоже время положение данного региона на кратчайшем пути между российским анклавом - Калининградской областью и основной частью России, создаёт поле для многостороннего сотрудничества в целях обеспечения транзита грузов и пассажиров. Это потребует создания в приграничных регионах Беларуси, Литвы и Латвии приграничной инфраструктуры и развития, связанных с её функционированием, видов деятельности, что, в свою очередь, должно привести к значительному

трансформированию социально-экономического облика данной территории. В перспективе развитие сотрудничества между приграничными регионами этих стран, например, в области инфраструктурного строительства и развития позволит привлечь в них значительные внешние и внутренние инвестиции экономики.

В настоящее время перспективным направлением развития приграничного сотрудничества Беларуси со странами Балтии может явиться сотрудничество в сфере организации рекреации и туризма. Речь здесь может идти, например, о рекреационном освоении расположенных в непосредственной близости от границы уникального природного комплекса Браславских озёр, имеющего статус национального парка. При должном развитии туристской инфраструктуры, организации рекламы, повышении уровня обслуживания данный природный комплекс сможет привлечь туристов из прибалтийских стран, России, Польши, Германии. При грамотной и гибкой ценовой политике он сможет конкурировать с уже созданной туристско-рекреационной зоной «Мазурские озёра» в Республике Польша, а, возможно, и сотрудничать с ней в целях формирования единого туристско-рекреационного пространства.

Концентрация на сравнительно небольшой территории значительного числа привлекательных природных и историко-культурных объектов в совокупности с достаточно низкой плотностью населения и относительно высокой долей сельского населения, создаёт хорошие предпосылки развития таких направлений туризма как сельский, охотничий, этнический, экологический туризм. Это позволит решить проблему занятости местного населения.

Важной предпосылкой развития приграничного сотрудничества является наличие значительного числа родственных связей между жителями приграничных районов Беларуси, Литвы и Латвии. Это предполагает, несмотря на скорое вхождение последних в ЕС, сотрудничество в направлении упрощения паспортно-визового режима для отдельных групп населения (например, открытие временных пунктов пропуска для жителей приграничной зоны).

Белорусско-польская приграничная зона включает шесть административных районов Брестской и Гродненской областей Беларуси. Её площадь составляет 11,1 тыс. км², где проживает 870 тыс. человек. Средняя плотность населения – 78,3 человека на 1 км².

В целом по своей доле во внешнеторговом обороте Беларуси польское направление удерживает четвёртую позицию и лидирует по количеству созданных на территории Беларуси совместных и иностранных предприятий. Лидируют по количеству созданных совместных предприятий приграничные Брестская и Гродненская области. Вместе с тем, как отмечают специалисты, внешнеэкономические связи Беларуси и

Польша определяет не приграничные территории, а районы сосредоточения экспортных производств деревообрабатывающей, лёгкой и химической продукции. Причём в последнее время в белорусско-польских экономических отношениях наметилась тенденция к их спаду.

С польской стороны происходит корректировка внешнеторгового режима в сторону стандартов ЕС, в результате чего повысились импортные пошлины на основные статьи белорусского экспорта – нефтепродукты, химические волокна, калийные удобрения, пиломатериалы. Беларусь, в свою очередь, был введён ряд мер по ограничению импорта из Польши продовольствия.

В числе факторов, препятствующих сотрудничеству Республики Беларусь и Республики Польша, необходимо назвать различие моделей переходной экономики, и соответственно, механизмов управления и темпов трансформирования экономических систем этих государств. С точки зрения отмеченных выше обстоятельств, можно утверждать: в сравнении с периодом начала 90-х гг., белорусско-польская граница стала менее прозрачной для субъектов хозяйствования, т.е. сохранила значительный набор барьерных функций, что является довольно серьёзным препятствием для развития трансграничных связей приграничных регионов.

В тоже время следует отметить, что в силу особенностей своего исторического развития и географического положения, Беларусь и Польша вынуждены и должны быть в равной степени открытыми как на Запад, так и на Восток. Осознание этого привело к повышению значимости приграничного сотрудничества и формированию его механизмов и элементов. Лишь в период с 1991 по 1996 гг. между двумя странами было заключено 14 договоров и соглашений о сотрудничестве в области науки и технологии, образования, культуры и туризма, 13 – в области трансграничного взаимодействия, 4 – транспорта и ещё 7 соглашений, затрагивающих различные аспекты торгово-экономического сотрудничества. Это составило четверть от всех заключённых договоров и межведомственных соглашений между Беларусью и Польшей.

К числу наиболее значимых факторов, определяющих развитие сотрудничества приграничных регионов Беларуси и Польши, можно отнести следующие:

- исторически сложившаяся общность систем расселения;
- общность природных условий и ресурсов;
- наличие в пределах приграничных территорий транспортных артерий, имеющих международное значение.

Одним из главных, определяющих факторов развития связей между приграничными регионами Беларуси и Польши, является их транспортно-географическое положение. Социально-экономический облик белорусско-

польского пограничья в значительной степени определяется прохождением здесь транспортных артерий международного значения, в связи с его расположением между основными промышленными центрами стран ЕС, Центрально-Восточной Европы и промышленными центрами, сырьевыми районами России и Японии.

Благоприятные транспортные условия объективно способствуют ускоренному развитию приграничных регионов. Это обуславливает необходимость расширения сотрудничества сопредельных стран в направлении увеличения мест контактов их транспортных систем. Для этого на территории белорусско-польского приграничья сложились особые условия. До середины 80-х годов интенсивность грузовых перевозок через белорусский участок советско-польской границы была достаточно большой. Так, только Брестский железнодорожный узел имел возможность в год пропускать до 15 млн. т. грузов. Пассажирооборот при этом был мизерным. К началу 90-х годов наметилось некоторое сокращение перевозок, что связано с распадом СЭВ, и последовавшим за этим практически полным разрывом экономических связей между его членами.

Одновременно с распадом СССР и процессами экономической либерализации в постсоветских странах, облегчением паспортно-визового режима резко возросли объёмы трансграничных пассажиропотоков. Увеличилось количество трансграничных пассажирских поездов, регулярных автобусных маршрутов, а особенно поездок граждан на легковых автомобилях. Со второй половины 90-х наметилась тенденция роста грузооборота между Россией и странами ЕС. Доля их транспорта в общем количестве пересекающих белорусско-польскую границу транспортных средств составляет более 50%. Причём, следует отметить тот факт, что если грузопоток через железнодорожные переходы к концу 1991 г. сократился (для Брестского железнодорожного узла примерно втрое по сравнению с его максимальной пропускной способностью), то нагрузка на автомобильные переходы значительно возросла. Так, по данным национального доклада ООН за 1996 г. «Беларусь: среда для человека», количество только грузовых автомобилей, пересекающих белорусско-польскую границу, увеличилось в четыре раза, что связано с развитием непосредственных связей предприятий с иностранными партнёрами.

Такой резкий рост трансграничных перемещений привёл к возникновению на немногочисленных пограничных переходах комплекса проблем, связанных с их недостаточной пропускной способностью, низким уровнем сервиса на них и связанных с этим очередей. Серьёзной проблемой стали коррупция, контрабанда, трансграничная преступность. Одним из решений данного комплекса проблем может стать

деконцентрация пассажирских потоков, путём увеличения числа пунктов пропуска. Концентрация грузопотоков в целом носит объективный характер. Это связано с прохождением здесь автомобильной магистрали Е-30. По данным польских учёных, по этой трассе границу пересекает 12,3% всех грузовых автомобилей, едущих в Польшу. Решением проблем с очередями грузовых автомобилей, которые стали довольно частым явлением на белорусско-польской границе, является модернизация существующих на данный момент таможенных терминалов с целью увеличения их пропускной способности и улучшения качества обслуживания.

Следует отметить, что вовлечение отдельных видов транспорта в интеграционные процессы сопровождается неравным участием в них различных участков транспортной сети. В наибольшей степени увязаны по своим параметрам и скоординированы в своём функционировании те звенья национальных транспортных систем, которые составляют международные магистральные пути. В значительно меньшей степени координируется развитие и функционирование региональных и локальных транспортных подсистем. Следствием этого является чрезмерная концентрация пассажиропотоков.

В проектах по приграничному сотрудничеству в сфере транспорта должна быть отражена данная особенность, для чего необходимо изучение возможностей открытия новых пограничных переходов для граждан, в первую очередь для тех из них, которые проживают в приграничной зоне. В открытии таких переходов, в первую очередь, заинтересованы сами приграничные регионы. Это позволит разгрузить существующие пункты пропуска, улучшить криминальную обстановку в приграничье, снизить антропогенную нагрузку на природные комплексы. Создание новых специализированных пунктов пропуска и сопутствующей им инфраструктуры (например, туристской) в совокупности с льготным таможенным режимом, стимулирующим приграничную торговлю, позволит создать новые рабочие места по обе стороны границы, что положительно скажется на социально-экономическом развитии прилегающих территорий.

Значительным потенциалом в развитии трансграничных связей обладают приграничные СЭЗ «Брест» и «Малашевичи», а также еврорегионы «Буг», «Нёман» и «Беловежская пуца». В рамках этих образований возможна реализация таких крупномасштабных проектов, как модернизация приграничных аэропортов в Бресте и Гродно, Днепро-Бугскоко канала, организация трансграничных туристско-рекреационных зон, охрана и мониторинг окружающей среды.

Кроме развитой транспортной системы, имеющей международное значение, важным условием развития приграничного сотрудничества

являются исторически сформировавшиеся общие системы расселения, которые в силу ряда политических причин оказались разделены линией государственной границы. На территории белорусско-польского пограничья выделяются две общие системы расселения. Для первой – Гродно - Белосток - Волковыск характерны незначительные расстояния между главными опорными центрами – 70-80 км. Учитывая этот фактор, а также то, что здесь имеется развитая производственная и социальная инфраструктура, удобные железнодорожные и автомобильные пути, можно использовать потенциал этих трёх городов для развития всей системы в целом.

Вторая система – Брест – Бяла-Подляска – расположена в пределах трансевропейского транспортно-коммуникационного коридора Париж – Минск – Москва. Расстояние между Брестом и Бялой-Подляской также незначительное – 40 км. Брест – крупный транспортный узел с большим количеством перевалочных, сортировочных станций и складов. Для города характерно гипертрофированное развитие транспортной инфраструктуры, что проявляется в размещении значительного количества её мощностей в пределах городской черты, что негативно сказывается на экологической обстановке в городе. В связи с этим актуальна проблема частичного переноса этих мощностей за городскую черту, что позволило бы, с одной стороны, разгрузить Брестский транспортный узел и приступить к его модернизации, с другой стороны это стимулировало бы развитие опорных центров расселения среднего уровня в приграничной зоне.

Вышеназванные урбанизированные зоны белорусско-польского пограничья чередуются с природными комплексами, которые размещены по обе стороны границы и входят в полосы природно-территориальных систем, которые формируют своеобразные экологические коридоры. Так, Августовская и Гродненская пуши, являются частью Поозерья, которое протянулось параллельно Балтийскому побережью через Польшу, Литву и Беларусь и далее на восток. Беловежская и Кнышинская пуши, а далее Ружанская и Налибокская образуют пояс естественных лесных массивов. Западное Полесье является частью полосы болот, протянувшихся от Люблинского Полесья и далее на восток. Перечисленные природные комплексы тесно взаимосвязаны между собой, это определяет проведение скоординированной экологической политики, разработку системы мероприятий нормативного, организационного и хозяйственного характера. Перспективным представляется сотрудничество в направлении дальнейшей интеграции Беловежской пуши, создании ландшафтного парка «Подляский поворот Буга», восстановление для туристско-рекреационных нужд Августовского канала.

Обобщая всё отмеченное выше, можно утверждать, что Беларусь характеризуется большим разнообразием географических и социально-

экономических условий приграничного сотрудничества на разных участках периметра приграничной зоны. Однако, для того, чтобы потенциально возможные экономические взаимодействия реализовались на практике, необходимо существование зон общих интересов. И здесь необходимо различать краткосрочные и долгосрочные интересы приграничной интеграции.

Краткосрочный интерес, в первую очередь, связан с таким явлением как приграничная торговля (как экономическое понятие приграничная торговля близка к термину экспорт товаров и услуг, но отличается от последнего тем, что ограничена рамками приграничной зоны и чаще всего реализуется в форме физического перемещения одного из участников трансграничных отношений на территорию своего партнёра в качестве потребителя товара), которая в данный момент носит в основном спекулятивный характер, основанный на разнице в курсах соседних стран и различиях в ценах на аналогичные товары. С этой точки зрения практически вдоль всей белорусско-польской границы, особенно в тех местах, где имеются пограничные переходы, торговые приграничные связи развиваются. В тоже время следует отметить, что торговля в приграничной зоне может и должна иметь долгосрочный характер.

Весьма разнообразны проявления долгосрочных интересов сопредельных регионов. Эти интересы могут быть связаны:

- во-первых, с наличием природных ресурсов (минерально-сырьевых, земельных, водных, биологических, туристско-рекреационных и т.д.), расположенных в пограничной зоне, и возможностью, а в некоторых случаях и необходимостью (например, водных ресурсов рек бассейна Западного Буга) их совместного использования, что является природной базой формирования долгосрочного экономического и экологического сотрудничества сопредельных регионов. Такие зоны взаимных интересов могут быть связаны с комплексным использованием минерально-сырьевых ресурсов Полесья (например, запасов тугоплавких глин и силикатного строительного песка в Столинском районе), бассейна реки Западный Буг (месторождение мела в Малоритском районе);
- во-вторых, взаимный интерес в экономической сфере может быть вызван необходимостью ликвидации или в координации функционирования дублирующих структур по обе стороны границы с дальнейшими перспективами создания совместных производств, которые имели бы более обширные рынки сбыта на сопредельных территориях за счёт экономии на транспортных издержках. Имеются в виду более выгодные условия ориентации, находящихся в приграничной зоне предприятий не на внутренний рынок, а на рынок соседей.

В том же ряду экономической целесообразности тесного сотрудничества сторон лежат проблемы взаимовыгодного использования трудовых ресурсов, маятниковые и сезонные миграции, которых связаны с различиями в уровне социально-экономического развития приграничных районов и, соответственно, в оплате труда. Здесь, вероятно, усилия могут быть направлены на создание цивилизованного рынка приграничной рабочей силы, необходимость формирования которого не вызывает сомнения. В настоящее время он практически полностью находится в «тени» и в значительной мере контролируется трансграничными криминальными группировками. Профессиональная подготовка кадров, их социальная защита, проблемы налогообложения доходов – это далеко не полный перечень сфер долгосрочных общих интересов приграничных регионов.

К настоящему времени взаимная заинтересованность Беларуси и её соседей в приграничном сотрудничестве проявилась в форме институционально созданных еврорегионов «Буг», «Нёман», «Беловежская пуца», прорабатываемого проекта зоны трансграничных связей на стыке регионов Литвы, Латвии и Витебской области Беларуси, создании в 1997 г. Совета приграничных областей, включающего восемнадцать регионов Беларуси, России и Украины (с белорусской стороны в него входят Витебская, Гомельская и Могилёвская области).

В настоящее время в европейских странах наиболее важными элементами механизма приграничного сотрудничества являются его правовые аспекты, инструменты наднационального уровня управления, методы и способы его координационной составляющей.

Следует отметить, что правовая основа приграничных связей РБ, принципиально отличается от таковой в странах ЕС. Беларусь (в отличие от Польши и Украины) не присоединилась к Европейской Рамочной конвенции о приграничном сотрудничестве территориальных сообществ и властей. Межгосударственный блок правовой базы приграничных связей составляют подписанные на правительственном уровне Соглашения об основных принципах трансграничного сотрудничества между Беларусью и Польшей (1992 г.), Беларусью и Латвией (1998 г.), Соглашение о сотрудничестве приграничных областей Беларуси и Украины. К этой же категории правовых актов могут быть отнесены договора об экономическом сотрудничестве, заключённые Беларусью и её областями с регионами России и Украины.

Второй блок юридической базы составляют нормативно-правовые акты, регулирующие внешнеторговый режим Беларуси в целом, например, Таможенный и Гражданский кодексы РБ, Законы «Об иностранных инвестициях», «О государственном регулировании внешнеторговой деятельности» и некоторые другие.

Анализ существующей договорно-правовой базы приграничного сотрудничества Беларуси позволяет сделать вывод о том, что она нуждается в совершенствовании, особенно в той её части, которая касается расширения компетенций местных органов власти, в первую очередь, в осуществлении внешнеэкономической деятельности.

Наиболее слабовыраженным и противоречивым является наднациональный уровень регулирования приграничных связей. Беларусь является членом регионального объединения СНГ и его субрегиональных блоков. С одной стороны этот факт должен был бы благоприятствовать развитию трансграничных связей между приграничными регионами стран-членов СНГ. В тоже время по формальным признакам (количество пересечений границы, создание еврорегионов, количество функционирующих совместных предприятий и т.д.) наибольшая активность трансграничных связей обнаруживается в западных приграничных регионах. Однако, западная граница является внешней экономической границей СНГ и Таможенного союза, что осложняет взаимодействие приграничных регионов и субъектов хозяйствования, расположенных на их территории, ограничивает возможности использования инструментов наднационального регулирования по отношению к ним. При этом в силу аморфности, политических и экономических противоречий, неразвитой является наднациональная составляющая организационно-правовой базы приграничного сотрудничества стран СНГ.

Невыраженность данного элемента может быть компенсирована иными формами содействия приграничным связям. Например, в рамках белорусско-польского сотрудничества на уровне приграничных территорий могут быть использованы инструменты таможенно-тарифного регулирования. Некоторая либерализация, а возможно и полное снятие таможенных барьеров на отдельные группы товаров в пределах небольших территорий (15-20 километровой зоны) представляется в этом случае действенным элементом регулирования межрегионального сотрудничества.

В развитии белорусско-российских и белорусско-украинских пограничных зон существуют экономические основания использования государственных ресурсов. Это связано с тем, что в числе целей этого направления приграничного сотрудничества особое место занимают проблемы создания общего экономического пространства с этими государствами.

Европейский опыт осуществления трансграничного сотрудничества свидетельствует, что преобладание нефинансовых стимулов его реализации является специфической чертой и предопределяет организационную и информационную составляющие в качестве

инструмента обеспечения экономической координации и развития целостности пограничных территорий. Это выдвигает на первый план задачи создания совместных органов управления пограничной зоной и наделения их соответствующими полномочиями.

Субъект управления, представляя собой совместное территориальное звено управления, участвующих в сотрудничестве стран, должен исполнять роль наднационального органа. При этом он должен обладать международной правосубъектностью и в то же время не выходить по уровню компетенции за пределы пограничной зоны и локального характера решаемых проблем, одновременно иметь возможность регулировать экономические отношения, имеющие сложную пространственную конфигурацию.

В основе определения набора управленческих функций и организационной структуры управления приграничными связями могут лежать следующие принципы:

- соответствие сферам приграничного сотрудничества;
- адекватность существующему уровню интеграции;
- учёт общего подхода сопредельных государств к вопросу о либерализации внешнеэкономической деятельности и передача отдельных функций по её регулированию на региональный уровень.

Организационный механизм приграничного сотрудничества должен формироваться применительно к сферам, имеющим приоритетное значение в рамках создаваемых в Беларуси приграничных зон. Одним из главных направлений их развития, по крайней мере, на первых этапах их формирования, должно стать развитие приграничной торговли. Приоритетность её развития связана с возможностью получения быстрого экономического эффекта. В частности, активизация торговых связей в приграничной зоне позволит одновременно решить проблему увеличения экспорта, удовлетворения потребностей населения и роста доходной части местных бюджетов за счёт налогов от осуществления торговой деятельности.

Деятельность наднациональных и региональных органов управления сотрудничающих стран может быть сконцентрирована на следующих направлениях:

- упрощение визового режима пересечения границы гражданами, что особенно актуально в контексте скорого вступления Литвы, Латвии и Польши в ЕС. С этой целью возможно заключение договоров о так называемом малом приграничном движении, согласно которому жители приграничной зоны смогут пересекать границу в упрощённом паспортно-визовом или безвизовом режимах через все имеющиеся переходы;

- урегулирование механизма взимания таможенных пошлин с физических и юридических лиц проживающих и реально функционирующих в пределах пограничной зоны. На первоначальном этапе возможно увеличение норм провоза товаров без таможенного обложения. Впоследствии целесообразно заключение соглашения о зоне свободной торговли локального масштаба. Как правило, беспошлинный режим торговли охватывает территорию с радиусом 10-15 км и распространяется на отдельные группы товаров, имеющих местный характер потребления;
- инфраструктурное обустройство приграничной торговли. Речь идёт о совместном строительстве специальных мест торговли, системы складов и выставочно-ярмарочных объектов, развитие транспортной инфраструктуры и дальнейшая сдача этих объектов в аренду или платное пользование.

Как отмечалось, важное место в сотрудничестве приграничных регионов должно занимать сотрудничество в экологической сфере. В самых общих чертах главными его аспектами могли бы быть следующие:

- формирование рабочей комиссии, осуществляющей всю координационную работу в данной области, в частности, мониторинг за состоянием окружающей среды и сбор необходимой экологической информации;
- распространение на межрегиональный уровень властных полномочий, которые уже имеются у территориальных органов управления сопредельных стран в области природоохранной деятельности. Например, это может быть совместная экологическая экспертиза строительства и функционирования промышленных объектов, а также регулирование экологического налогового обложения;
- создание гибких хозяйственных структур (акционерных обществ, консорциумов), деятельность которых строилась бы преимущественно на коммерческой основе с возможным привлечением внешних источников финансирования. Например, в проекте «Зелёные лёгкие Европы», где с белорусской стороны участвует Гродненская область, этот принцип может быть реализован путём платного предоставления экологических благ – чистой территории. Такие хозяйственные совместные структуры могут и должны включать объекты туристского бизнеса.

Таким образом, многообразие условий приграничного сотрудничества Беларуси диктует необходимость разработки его конкретного содержания, механизма и комплексной модели.

В настоящее время в европейском (в т.ч. постсоветском) пространстве сложились особые условия для интеграционного взаимодействия государств и их регионов. Развитие приграничного сотрудничества весьма

значимо для Республики Беларусь, как европейского государства, с точки зрения её вхождения в формирующееся общеевропейское экономическое, информационное и культурное пространство, преодоления кризисных явлений в экономике. Страна имеет благоприятные возможности для осуществления регионального приграничного сотрудничества с Польшей, Литвой, Латвией, Украиной и Россией и в краткосрочной и в долгосрочной перспективе.

Summary

REGIONAL TRANSBORDER CO-OPERATION IN SYSTEM OF INTERNATIONAL CONTACTS OF REPUBLIC OF BELARUS

At present in the European space (including the post-soviet one) specific conditions have been created for integration of countries and their regions. Transborder co-operation, being a local form of labour division, whose objects are located within a relatively narrow area on both sides of the state border, on the one hand, is a vital reserve of economic development in the borderlands, and on the other, favours intensification of integration processes between states.

Development of transborder co-operation is very important for Belarus due to its entrance into the all-European economic, information and cultural space that is being created, and in order to enhance overcoming of crisis phenomena.

At present Belarus has got borders with five sovereign states: Russia, Ukraine, Poland, Lithuania and Latvia, and it has favourable conditions for implementation of regional transborder co-operation, both in short- and long-time perspective.

Co-operation with Russia is based on uniform economy and technology, similarity of tasks during market transformations and accessibility of transport networks. The single customs space, on the one hand, facilitates transborder co-operation, and on the other, however, due to lack of regulations concerning excise and duty collection, and the so-called "permeability" of the border, favours criminality, smuggling, and illegal migration. The Belorussian-Ukrainian borderlands are the zone of nuclear contamination. Whereas co-operation with the Baltic Republics and Poland must be conditioned by the fact that these countries are joining the EU, and this will affect the change in policy concerning customs, tariffs and visas.

Transborder co-operation of Belarus is dependent on high diversity of its geographical and socio-economic conditions. In order to enable practical accomplishment of potential economic contacts there should be some fields of common interest. They should surely include transborder trade, use of natural resources as a base of economic and ecological co-operation, joint companies (without doubling structures on both sides of the border) operating on large sales markets, oriented to the neighbour's market,

a civilised market of transborder labour force and legal regulations complying with the *acquis communautaire*.

The European experience shows that an important task in transborder cooperation is creation of joint agencies, managing the border zone and authorising them with due responsibilities. Such agencies should be subjects of international law and as an agency of local administration they should play a role of a supranational agency.

**GEOPOLITICAL CONTEXT FOR
THE DEVELOPMENT OF NEW FORMS
OF CO-OPERATION BETWEEN THE TRI-CITY
AND KALINGRAD OBLAST**

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At the beginning of the nineties a new Baltic pattern for international co-operation emerged. Within a period of more than ten years countries around the Baltic Sea developed a dense network of governmental, non governmental institutions and programmes. Though these new international structures, organisations and relations presently appear as early integration forms they develop closer links and will in future further consolidate relations between entities forming Baltic Europe.

The area around the Baltic is traditionally bound by strong cultural and economic ties. Trade and shipping on the Baltic were well developed in the past. A sense of neighbourliness as well as certain common features of the settlement structure remain present up to this day.

Political disruption for over 50 years starting from the end of World War II was the reason for the exiguous co-operation in the area.

To the end of the eighties the Kalinigrad Oblast was the most westward stretching territory of the RFSRR, highly military in character and separated from the motherland by republics being part of the Russian Federation, an area treated as taboo issue as if it "did not exist" on the political map. This region underwent powerful changes at the verge of the eighties and nineties. The disintegration of the USSR brought this region, which for years remained a military enclave, back to light and to the centre of political discussions. On Lithuania regaining independence, the Oblast was cut off from Russia first by one and next by several states (Latvia and Belarus). The final isolation of the Oblast took place on December 8, 1991 with the disintegration of the USSR.

The position of Kaliningrad is unique from the historical, economic and geopolitical point of view. This former part of Eastern Prussia is distanced 600 km from Russia to which it belongs. It is much closer to Warsaw or Berlin than to Moscow. On the other hand the Oblast is located relatively close to highly

developed regions of Western Europe. The region features the status of a free economic zone and since 1996 a special economic zone.

The Kaliningrad Oblast covers an area of 15.1 thousand km², with 1692 km² being part of the waters of Wisła Bay [Zalew Wiślany] Kaliningrad Bay and Kurońsk Bay. The population of over a million inhabitants comprises 78.5% (930 thousand) Russians, 8,7% Belarusians, Ukrainians 8,3 %, Latvians 0,8%, Poles 0,5% and Germans 0.1%¹.

Economically, Kaliningrad was and is very important for Russia as it supplied approximately 10% of fish production, 6% celluloid, 4% paper (4 celluloid-paper plants), 100% amber (approx. 700 tons per year). Exploitation of this mineraloid at the present pace in the area holding 95% of existing resources should last for the next 300 years. Over one million tons of low sulphur content crude oil was exploited per year. At present, 750 thousand tons are mined annually. There are plans for exploitation of the sea bed field D-6 located on the Baltic shelf. Other extensive, economically significant resources include rock-salt, peat and mineral water.

Until recently, 10% of the Oblast inhabitants earned their living in sea related professions with a deep sea fishing fleet numbering 600 vessels². As the region was strongly military and strategy oriented several military production plants operated in the region producing navy ships, space rockets engines, electronic equipment, optical equipment, etc. Lack of military orders in the last few years meant problems in sustaining these branches of industry. Lack of orders placed by the army in the last few years have resulted in great difficulties in maintaining this branch of industry. Only some plants managed to switch to non-military production, others like for example OKB „Fakel” found new target customer groups offering their low power engines for American and French artificial earth satellites³.

The Oblast had a relatively well developed transport system with the only ice-free Baltic port directly linked with shipping lines to Russian ports and other ports of Baltic States. Annual handling volume of the port reached nearly 6 million tons, which is barely 1/3 of its handling capacity.

The most important city of the Oblast is Kaliningrad, with 46% of the population and 60% of the industrial potential⁴ concentrated in the city.

¹ *Younger son of Russia – Kaliningrad*, Kaliningrad 1996, p.34 (statistic yearbook)

² A. Zbudzki, *Współpraca przygranicznych województw RP z Obwodem Kaliningradzkim Federacji Rosyjskiej*, (Cross-border co-operation of Polish Regions with the Kaliningrad District of the Russian Federation) [w:] J. Roślowski, G. Grzelak (editor). *Woj. Gdańskie 2000 plus*, Development Strategy, Gdańsk 1997, p. 62

³ N. Muraszow, *Pokojowa produkcja „Obronki”*, (Peace oriented production of „Obronki”, Russian Regions), no 3(279), February 1999, p.27

⁴ G. Fiodorow, V. Korneyevets, *Multilevel Interests for the Development of Kaliningrad Region as an Enclave Territory of Russia*, IOR-Schriften, no 17/1996, p.45

Geopolitical transformation of the nineties in the XX century, the gaining of independence by Lithuania, Latvia and Estonia and further development of European structures eastwards have converted the effectively isolated USSR Kaliningrad Oblast - the Russian exclave neighbouring with Poland, Lithuania and the Baltic.

Kaliningrad is located on the territory of Sambia, on the eastern bank of Gdańsk Gulf. On the opposite western bank lies the Tri-City Metropolis. Gdańsk Gulf with Wisła Bay and the nearby land are divided by a state border of Kaliningrad Oblast of the Russian Federation and the Republic of Poland. Soon this will become the border between EU and Russia. These developing centres on the opposite banks of Gdańsk Gulf did not maintain relations of any significance although they are distanced merely 150 km from each other.

In view of the economic and political changes taking place in Poland and the progressing integration with Europe and the world, regional policies take on a new dimension. This is expressed by the modern integrated approach to regional development. One of the key features of this approach is stimulation of economic, scientific, cultural potential through co-operation, dialogue and co-ordination of measures undertaken by various players of the regional scene (internal integration) and (external integration), resulting in the emergence of complex network systems.

An important phenomenon enhancing effective regional economy is the metropolisation process, which progressing creates a co-operation and interdependence network. This process involves institutions, social, economic formal and informal relations, which take on varied forms: partnerships, technological, financial and commercial alliances. Such a variety of entities, areas, levels and trends in mutual interaction develops a dense institutional network⁵, expressed not in the number of organisations but in the intensity and quality of relations between them. Institutions and events evoked by these institutions provide the links in the network structure, which forms the grounds for development and operation of a metropolis.

The new geopolitical situation created a favourable environment for shaping the fundamentals of the new metropolis around the Gulf of Gdańsk. The main centres of this bicentric metropolis would be Kaliningrad and the Tri-City. A metropolis according to A. Kukliński should be well founded in its region, internally integrated; socially, economically, politically and culturally, and concurrently should stimulate and develop a system of external relations, opening new areas for co-operation and competition, among others, in the framework of the European integration process. The efficiency of such metro-

⁵ J. Hausner, *Modele polityki regionalnej w Polsce [Model sof regional policy In Poland]*, *Studia Regionalne i Lokalne*[Regional and local studies], no 1 (5) 2001, Europejski Instytut Rozwoju Regionalnego i Lokalnego.

politan networks depends to a large extent on the degree of communication – information flow, as well as cohesion, i.e. extent of common interest of the whole network and its elements⁶.

The present changes taking place on the banks of Pregoła both give hope and to a certain extent give rise to concern. The contemporary Kalingrad, which belongs to Russia, is subject to continuous change in practically all aspects of life. Cut off from the world for tens of years it is energetically making up for economic and cultural negligence. An attempt to cut the city away from its past was a failure. It is now, in front of our eyes, coming back to its roots though of different state and ethnic heritage⁷.

In the past Królewiec held an important place in the history of Polish culture particularly in the period starting from the XV to half of the XIX century. The growing importance of Królewiec, as a community developing a specific infrastructure for the development of intellectual culture, in 1544 saw the establishment of the University of Królewiec, commonly called after its founder prince Albert — Albertina. One of the signs of this growing significance was the development of printing houses and book houses. Books in all languages used in the region were printed here — in German, Polish, Lithuanian and even in old Prussian.

In the middle of the XVI century Krolewec boasted the printing of more books than were printed in the whole of Poland at the time⁸. The first Polish book appeared in 1544. The XVI saw the printing of 104 Polish books in Królewiec (as compared to 297 in Latin and 183 in German)⁹. In 1718, one of the first Polish newspapers appeared — the weekly journal „Pocztą Królewiecką” [Królewiec Post], an initiative which appeared in Warsaw several years later starting 1729¹⁰ with the editing of — „Kurier Polski” [Polish Courier]. Also in the XIX century and the first decades of the XX century 312 titles in Polish were published in Królewiec¹¹.

⁶ B. Jałowicki *Miasta w sieciach* [Cities in networks], [in:] J. Kołodziejski, T. Parteka (editor), „Kształtowanie ładu przestrzennego polskich metropolii w procesie transformacji ustrojowej III RP” [Shaping of special order in Polish metropolis in the process of structural transformation][Development of spatial order in Polish metropolis in the process of transformation of the III Republic of Poland], Biuletyn KPZK PAN, zeszyt 193, Warszawa 2001.

⁷ J. Jasiński, op.cit. p.276.

⁸ W. Chojnacki, *Z dziejów drukarstwa polskiego w Królewcu* [From the history of Polish printing art in Królewiec], Komunikaty Mazursko –Warmińskie, 1961, no 1, p. 21.

⁹ J. Jasiński, *Historia Królewca* [The history of Królewiec], Książnica Polska, Olsztyn 1994, p.69.

¹⁰ same p.73

¹¹ same p..80

Many Poles studied at the University especially in the XVI and XVII century. In 1744 283 out of a total of 1032 students came from the territory of Poland, many from Gdańsk, Elbląg, Braniewo, Tczew, Malbork, Grudziądz, Toruń, Olsztynek and Ełk. The greatest among the Polish students of the University of Królewiec was the poet Jan Kochanowski¹². The masterpieces of, among others, Mikołaj Rej and Marcin Strykowski were printed in Królewiec and Ełk.

During a period of four hundred years many remarkable representatives of self governmental bodies and non governmental organisations, representatives of administration, clergy, teachers and others, who played a prominent role in the history of Pomerania got their university education at the Albertina, among them was the prominent figure of Florian Ceynowa¹³.

The most famous figure in the history of Królewiec was Immanuel Kant, in Gdańsk Jan Hewelusz, Artur Schopenhauer and Daniel Gabriel Fahrenheit.

Contemporary Kaliningrad is an important Russian scientific and academic centre. Scientific research is conducted in various fields. Special attention is due to achievements of Kalinigrad scientists in the field of radio astronomy and marine research with special focus on the Atlantic Ocean and space technology with related production of plasma fuelled engines for artificial earth satellites. Among 34 scientific institutions operating in the area in the middle of the nineties there were five schools of higher education, three civil universities teaching over over 13.4 thousand students. The following years showed a falling trend in the Oblast's scientific potential.

The biggest, among today's six schools of higher education, are the State University of Kaliningrad (a decrease in the number of students from 5.1 thousand in 1991 to 3.9 thousand in the academic year 1995/96), the State Technical University of Kaliningrad (a decrease in the number of students from 7.1 to 2.8 thousand students) and the Baltic State Academy (a decrease in the number of students from 3.4 to 1.2 thousand students).

Opening of new faculties and specialisations brought an increase in the number of students. In the academic year 1998/99 their number increased at the University to 9 thousand, to 5.3 thousand at the technical university and at the

¹² Other students included Studiował tu także brat Jan Kochanowski's brother Piotr, the son of Mikołaj Rej, Erazm Glicznar, Jan and Jakub Niemojeski, Bieniasz Budny, Marcin Kwiatkowski, Stanisław Sarnicki, who specialised in historical and geographical studies.

¹³ Among the better known are Reinhold Curicke – Gdańsk historiographer, Szczepan Józef Gólkowski – printer, publisher, opened the first Polish printing and book houses in Pomerania, Daniel Gralath the Younger – rector of the Gdańsk Academic Gymnasium, Jakub Teodor Klein – natural science expert, the founder of the Natural Science Society in Gdańsk.

Baltic Academy to 2.6 thousand with the total number of students in 2001 exceeding 21 thousand.

Other schools of higher education include the Kaliningrad Law Institute, the Higher Navy School and Kaliningrad Institute of Border Guards.

Recently, branches and consulting centres of, among others, the Sankt-Petersburg Agricultural University, Russian State Open Technical University of Communication, Moscow International University of Slavistics and International Institute of Economy have been opened in Kaliningrad.

In 2001 research and development work had been carried out together in 21 units employing over 2.4 thousand staff members.

In the year 2001, 20 schools of higher education operated in the Pomeranian region. These schools are located in six towns: 10 in Gdańsk, 5 in Gdynia, 2 in Słupsku, 1 in Pelplin, 1 in Sopot and 1 in Kwidzyń.

The total number of students is over 78 thousand with 83% of the total in Tri-city schools.

Education services are still dominated by public schools. Higher schools of education teach specialists in practically all fields of knowledge. The biggest higher school of education is the Gdańsk University with 24 thousand students, and Gdańsk University of Technology as second with over 16 thousand students. Other schools include a Medical Academy and Physical Education Academy, Fine Art Schools and pedagogical and art schools.

The number of academic teachers in the Pomeranian Voievodship numbered nearly 5 thousand, with almost 850 teachers holding the degree of assistant or full professor. The number of academic teachers per 10 thousand inhabitants in the region read over 20.

Among over 40 thousand students from the Warmińsko-Mazurskie Voievodship, nearly 4 thousand students are in Elbląg higher schools of education.

The presented examples of scientific research units round the Gdańsk Bay indicate the big intellectual potential concentrated on a relatively small area and located barely 150 km from each other. It is the co-operation of universities, technical universities, research institutes such as the Maritime Institute, Maritime Fishery Institute, AtlantNIRO, Maritime Academies, Fine Art Schools, which provide an opportunity for developing a new intellectual quality, which can become an important element in gradual development of a new „**innovation metropolis concentrated round the Gdańsk Bay**” with two poles in Tri-City and Kaliningrad. This joint „innovation metropolis concentrated round the Gdańsk Bay” should be characteristic and competitive in the whole integrating Baltic Europe.

It is also necessary to include into this network such measures as the newly established Pomeranian Science and Technology Park where conditions for partnership in scientific and industrial co-operation are being developed.

Traineeships, scientific exchange, student exchange, joint works and research projects, scientific publications, transfer of advanced technology, co-operation in technology, environmental protection, IT, biotechnology and other scientific research disciplines based on knowledge are only some potential forms and areas for developing mutual contacts and scientific co-operation.

The effect of these joint efforts on both banks of Gdańsk Bay could result in regional brand products characterised by a high degree of innovation, unique solutions and attractive products for the industry. This should generate a strong impulse for developing regional entrepreneurship, stipulate restructuring processes in the regional economy and what follows new jobs.

The developing of a new, „**innovation metropolis round Gdańsk Bay**” may become a modal form of co-operation not only in the Baltic but also in the European dimension. The methods here developed could be a „model laboratory” of co-operation between the European Union and Russia in the XXI century. The central location means that it is relatively close to the commercial markets of Western Europe and Eastern Europe.

Development of the bipolar metropolis round Gdańsk Bay is an opportunity for Kaliningrad and Russia¹⁴. It also lies in the interest of Poland and the European Union, which needs new regions for growth and expansion eastwards.

The future bipolar metropolis should be a stronger innovation centre than if it were the simple sum of potential of particular towns both on a national and Baltic scale. The benefits of the bipolar pattern result from the synergy effect of jointly using the same infrastructure, generating a big market, fast circulation of capital, human resources, information and products and depend on the degree of education, development and quality of infrastructure.

Shaping of the metropolis region is a costly, complicated and long-lasting undertaking. The inspiration and the co-ordination measures should come from the state, self-governments and both domestic and international private capital.

The new geopolitical situation integrating Europe, geographical proximity, coastal location, relatively fair communication infrastructure, development of border crossings, both land and marine crossings are the presumptions indicating the special possibilities for developing cross border co-operation between north east Voievodships of the Republic of Poland and the Kaliningrad Oblast.

The presently developing cross border contacts¹⁵ have just started to initiate the breaking of mutual barriers and prejudice developing relatively new,

¹⁴ A number of features of a metropolis proposed by Jałowicki (2000r.), which are already visible in the Tri-City. Kaliningrad does not show as many.

¹⁵ Cross-border co-operation under the Baltic Euroregions one of the best developed forms of co-operation.

formal and informal personal relations between local societies. Continuous efforts are necessary to lobby on behalf of Poland in Kaliningrad and in other Russian territories and to lobby for Russia in Poland. This necessitates intensification of co-operation of cultural institutions like the press, the mass media, (radio and television) publications, theatre exchange programmes (philharmonic, opera, orchestra, musical bands), support of culture oriented education, etc. Also non-governmental organisations face an important challenge in bringing the societies together and assisting in developing a citizenship society.

Shall we take advantage of this opportunity generated by the new geopolitical situation in this part of Europe? Will the new forms of international co-operation round the Gdańsk Gulf break through the ongoing inertia? Will the proposed model, one of the many forms of regional integration contribute to better development of economy and life standard of societies living on both banks of Gdańsk Gulf so that under the Baltic and European integration process this region is not driven to the peripherals of international economic zone? To some extent this depends on top level politics, but to a considerable degree it depends on of the scientific, economic, cultural and organisational zest of local societies, in other words from ourselves.

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Streszczenie

GEOPOLITYCZNE UWARUNKOWANIA ROZWOJU NOWYCH FORM WSPÓŁPRACY TRÓJMIASTA Z OBWODEM KALININGRADZKIM

Nowa sytuacja geopolityczna stworzyła dobre warunki do kształtowania zrębów nowej metropolii skupionej wokół Zatoki Gdańskiej. Głównymi ośrodkami tej bicentrycznej metropolii byłyby: Kaliningrad i Trójmiasto. Metropolie według A. Kuklińskiego powinny być: zakorzenione w otaczającym je regionie; zintegrowane wewnętrznie w aspekcie społecznym, gospodarczym, politycznym i kulturowym, a jednocześnie powinny dynamizować i rozwijać układy powiązań zewnętrznych, otwierając nowe pola współpracy i konkurencji, m.in. w ramach procesów integracji europejskiej. Efektywność takich metropolitalnych sieci zależy w dużej mierze od stopnia ich komunikatywności – przepływu informacji, jak również od spójności, tzn. stopnia wspólnoty interesów całej sieci i jej elementów.

Obecne przemiany zachodzące nad Pregołą napawają sporą nadzieją, w mniejszym stopniu niepokojem. Współczesny, należący do Rosji Kaliningrad znajduje się w stanie ciągłych przemian prawie we wszystkich dziedzinach życia. Odcięty przez dziesięciolecia od świata obecnie energicznie nadrabia dotychczasowe zaniedbania gospodarcze i kulturalne. Próba odcięcia miasta od jego przeszłości zakończyła się niepowodzeniem, Na naszych oczach powraca ono do swoich korzeni chociaż odmiennym rodowodzie państwowym i etnicznym.

W przeszłości Królewiec zajmował ważne miejsce w dziejach kultury polskiej, zwłaszcza w okresie od XV do połowy wieku XIX. Wzrost znaczenia miasta Królewca jako środowiska tworzącego swoistą infrastrukturę dla rozwoju kultury umysłowej związany był z powołaniem w 1544 roku uniwersytetem królewieckim, zwanym – Albertyną. W połowie XVI stulecia w Królewcu wydrukowano więcej książek niż w całej ówczesnej Polsce. Na uniwersytecie studiowało wielu Polaków, zwłaszcza w XVI i XVII wieku. Najwybitniejszym polskim studentem uniwersytetu królewieckiego był poeta Jan Kochanowski.

Współczesny Kaliningrad to ważny rosyjski ośrodek naukowy i akademicki. Z pośród sześciu dzisiejszych szkół wyższych do największych uczelni należą: Państwowy Uniwersytet Kaliningradzki, Państwowy Kaliningradzki Uniwersytet Techniczny. W roku 2001 prace naukowo-badawcze w Kaliningradzkie prowadzono łącznie w 21 jednostkach które zatrudniały ponad 2,4 tys. pracowników.

W województwie pomorskim w roku 2001 funkcjonowało 20 szkół wyższych.

Największą uczelnią w Trójmieście jest Uniwersytet Gdański gdzie studiuje ponad 24 tys. studentów, na drugim miejscu znajduje się Politechnika Gdańska – ponad 16 tys. studentów. Z ponad 40 tys. studentów z woj.warmińsko-mazurskiego, blisko 4 tys. studiuje na uczelniach elbląskich.

To właśnie współpraca uniwersytetów, uniwersytetów technicznych, instytutów naukowo badawczych takich jak Instytut Morski, Morski Instytut Rybacki, AtlantNI-RO, akademi morskich, uczelni artystycznych stanowi szansę na wspólne wypracowanie nowej jakości intelektualnej, która może stanowić ważny element stopniowego tworzenia nowej, „**innovacyjnej metropolii skupionej wokół Zatoki Gdańskiej**” z dwoma biegunami w Trójmieście i Kaliningradzkie. Ta wspólna „innovacyjna metropolia skupiona wokół Zatoki Gdańskiej” powinna wyraźnie wyróżniać się swoją specyfiką i być konkurencyjną w całej integrującej się Europie Bałtyckiej.

Niezbędne jest włączenie do tej sieciowej formy współpracy także takich przedsięwzięć jak powstający Pomorski Park Naukowo-Technologiczny, gdzie tworzy się warunki do partnerskiej współpracy nauki i przemysłu.

Efektom tych wspólnych, prowadzonych po obu stronach Zatoki Gdańskiej działań mogą być produkty markowe regionu o wysokim stopniu innowacyjności, unikatowe rozwiązania i atrakcyjne produkty dla przemysłu. Wytworzy to silny impuls dla rozwoju regionalnej przedsiębiorczości, który podniesie poziom gospodarczy, pobudzi procesy restrukturyzacji regionalnej gospodarki, a co za tym idzie stworzy szereg nowych miejsc pracy.

Wypracowanie nowej, „**innovacyjnej metropolii skupionej wokół Zatoki Gdańskiej**” ma szansę stać się modelową formą współpracy nie tylko w wymiarze bałtyckim, ale i europejskim. Wypracowane tu metody mogłyby stanowić „wzorcowe laboratorium” współpracy pomiędzy Unią Europejską i Rosją w XXI wieku.

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EUROREGION „SAN” NEW CONCEPTION OF TRANSBORDER PARTNERSHIP

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Searching hypothesis.

1. The formation of Euroregion “San” has the aim of improvement and imparting dynamism of transborder co-operation on polish – ukrainian border-line.
2. The area of future Euroregion “San” should be separated from Euroregion “Karpacki”.
3. There exists the necessity of formation of Educational Research Institute of polish – ukrainian co- operation on the territory of future Euroregion “San”

The critical estimate of euroregion “Karpacki”.

Euroregion “Karpacki” is a spatial structure with an area of 140 km², this means that it is a very big one. This is the largest according to its territory euro-region in Europe. This fact seriously limits the possibilities of cooperation between its separate areas .

The co-operation is made difficult because of :

- large ethnic differentiation (its territory consists of 5 countries)
- large language differentiation (Romance language – Romania, Finno – Ugrian – Hungary and Slavonic – Slovakia, Ukraine and Poland)
- to some extent affected territorial creature, its uprise was conditioned by decisions taken on government level of individual founder states, so this is inconsistent with the idea of euroregions, their formation should be the result of suggestions of local authorities, self – governed and public organizations and inhabitants.

- differentiate conditions of natural environment, hypsometric barriers (mountains).
- The lack of effects of its activity, in the place of integration there appears disintegration.

There occurred the reduction of commercial and tourism exchange. The border is more difficult to cross in comparison with the beginning of its rise. Creation of permanent institutions that assist co-operation within the region was failed and was not possible.

IV The estimation of strong and weak sides of Euroregion “San” for social – economic development.

The aim of estimating of strong and weak sides is the identification and using (or avoiding) trumps, weaknesses, opportunities and threats in the process of development.

Exemplifying, as strong and weak sides for social-economic development of Euroregion “San” should be admitted.

Strong sides:

- the area territorially densed, in the past it belonged to the some national unit.
- The compatibility of systems of technical and economic infrastructure.
- The area of deep economic co-operation
- Strong social connections
- Cultural similarity
- Language similarity
- The similarity of geographical position
- The will of co-operation of regional and government authorities
- A good opinion that has been estimating up to the present among local population
- The will of co-operation declared by intellectual, scientific and self-governed environments of border regions.

Weak sides

- incorrect agrarian structure of agriculture
- obsolete industrial structure
- low life standard of population
- asymmetry on the level of people’s income, to disadvantage of population on ukrainian side.
- still present to the mind negative consequences after World War II and operation “Wisła”

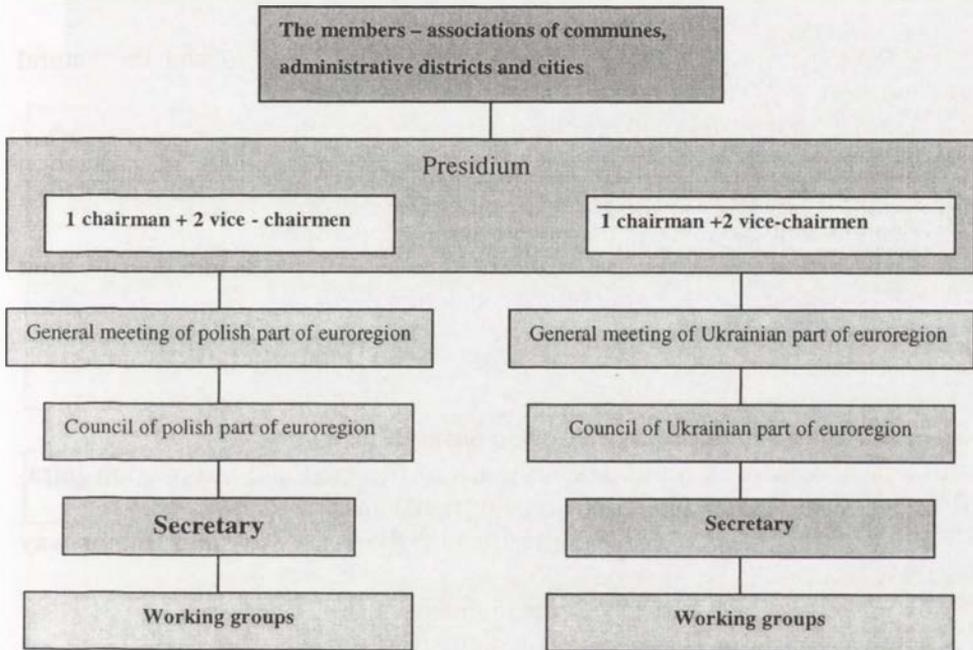
- Incompatible administrative and decisional structure of regions on both sides
- Necessity of possession of visa, while crossing the border
- NATO, EU-border

Financial means

- permanent payments of local and regional authorities, their growth is proportional to the number of population
- allocations
- takings from regional programs of European Union
- takings from non government, organizations, specially from Association of European border regions.

As the aim of functioning of euroregions is the neighbour co-operation between border regions, local and regional authorities, organizations and institutions that present border regions, organizing and functional structure of Euroregion “San” should be fitted to the structural features of this region.

Organizational structure of Euroregion “San”



Strategic actions for the benefit of social economic and cultural development of Euroregion “SAN” and rising of life standard.

The most important strategic activities in the sphere of co – operation are:

- activities for the benefit of promotion of mechanisms of growth, creation of regional banks which operate economic transactions within regions
- the development of transborder cooperation of enterprises
- canceling commercial restrictions on the way to legal and administrative regulations
- unification of customs and foreign – currency regulations
- lobbying activities for the benefit of unification and reducing of local taxes
- economic and social co – operation
- formation of SEA (special economic area)
- formation of technopolis and building of “high tech” industries
- international activities for the benefit of promotion of euroregion
- activities for the benefit of consolidation of national identity and tolerance
- protection of cultural heritage as the reconciliation between polish and ukrainian people
- cataloguing of cultural values of polish and ukrainian people
- cooperation in prevention and overcoming of natural calamity
- taking into consideration citizens complaints of super- border importance
- exchange of groups of school children.

Ecological development, improvement of life standard and the natural environment:

- constant, stable and staid development
- gradual introduction of European standards in the sphere of protection of the environment
- development capable to survival and self – supporting
- development which supplies the present generation needs and doesn't limit the possibility to supply the future generation needs.

The development of tourism

- tourist values
- tourist infrastructure
- protection of values of animated and unanimated nature.

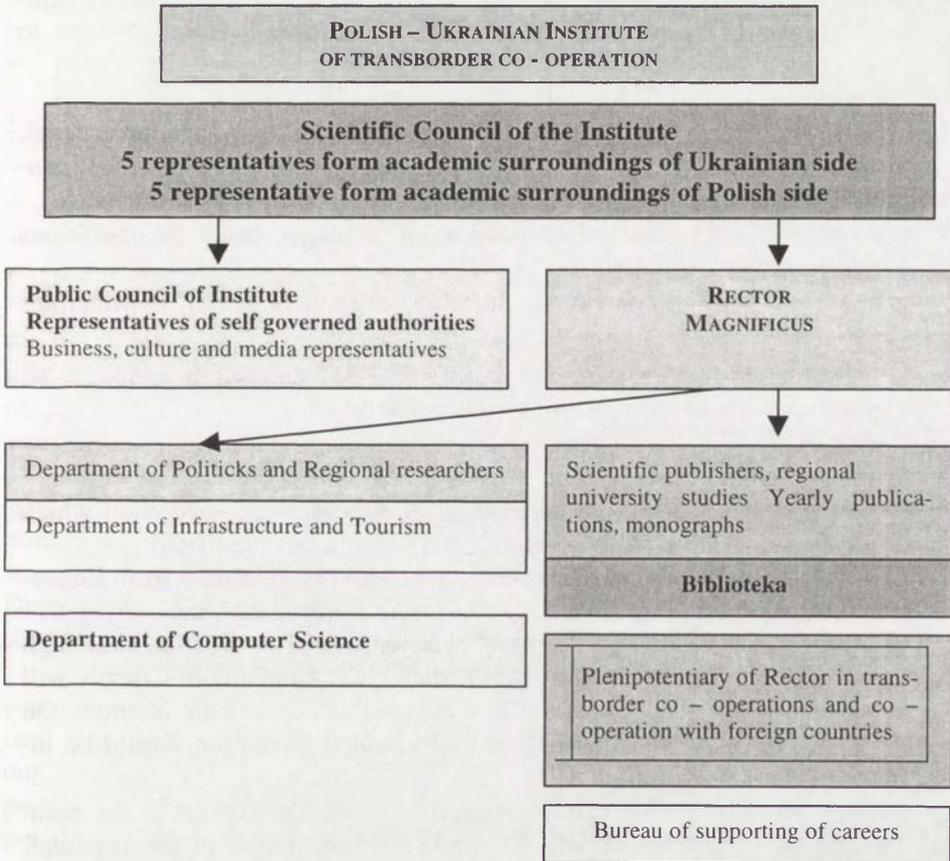
Development of transborder systems of transport and information infrastructure and infrastructure of business surroundings:

- common ventures of border infrastructure (border – crossings, motor way N4)
- improvement of border movement, common customs clearance
- clearing of sewage as requirement of clarity of rivers
- regional polish – ukrainian banks for operating of euroregional co – operation.

Development of sector of science, specialistic social services, human capital expenditure:

- formation of common polish – ukrainian educational institutions - strategy of formation of Polish – Ukrainian Institute of transborder co – operation.
- initiating of common polish-ukrainian scientific researches
- training and additional schooling of scientific – didactic staff
- education of young people at schools of euro-region on similar organizational and financial principles
- exchange of groups of young people in Institutes and Academies, situated in euro-region
- polish – ukrainian infant schools, primary schools and supprimary schools in Lwow, Pshemysl and Zheshow.

The strategy of Polish – Ukrainian Institute of transborder co – operation.



The idea of formation of Polish – Ukrainian Institute of transborder co – operation at State High Vocational College in Jaroslaw, originated during the

conferences and academic meetings, organized by educational institutions from Lwow and Jaroslaw.

Outstanding scholars, experts on regional, economic and social problems mainly professors such as professor Marian Dolishni, professor Pisarenko, professor dr hab. member of Ukrainian Academy of Sciences Antoni Jarosh, Professor dr hab. Zbigniew Makiela, Professor dr hab. Zbigniew Ziolo, Professor Roman Fedan, take part in discussions about co – operation and future of territories that are situated near the border of eastern Poland and western Ukraine. There exists the opinion among scholars that development chances for this region are the intensification of transborder connections and improvement of co – operation on higher level. Scholars admitted that an important mission of their activity is formation of Polish – Ukrainian Institute of transborder co – operation in changing international conditions, in conditions of introduction of principles of market economy and dislocating of European Union border to Ukrainian border.

The aim of activity of Institute with its seat in Jaroslaw is:

- formation of strong educational and scientific institution of academic level, which will educate highly qualified staff and transfer knowledge of managing of economic, social and administrative organizations into practice
- preparation of the staff to realization of manager tasks in conditions of modern global economy
- performing of cultural function, initiation and consolidation of principles of integration process
- animator of enterprise
- integration of social and economic environment
- initiator of pro – european ventures
- creator of regional development

To realize this mission in the region of transborder co – operation which is qualified as Euroregion “SAN”, the new staff should be conciliated.

To realized this co – operation, the staff should be recruited from Educational institutions situated on the territory of future Euroregion “San”

The staff from Ukrainian Academy of Sciences in Lwow, from state high Vocational College in Jaroslaw and from Pedagogical Academy in Cracow will constitute fundamental team of scientific – didactic workers of the Institute. On the next stage, the workers from different educational institution should be invited to common co – operation.

Organization of stable team of scientific – didactic workers is the main strategic aim and condition which determine Institute range in the regional, national and international scale. Institute will have at its disposal good local conditions. It will be situated in the city center on the territory of campus, where there are well – equipped conference rooms, lecture halls, school rooms and computer studies, sports equipment and administrative rooms.

The main rivalry advantage of the Institute is its euroregional and international character. From the very beginning of its existence there is the possibility of education students from Poland and Ukraine and education of scientific – didactic staff, exchange of scientific experience through the realization of common researching project, that are realized at the same time by scholars from Ukraine and Poland.

The correctness of functioning of the Institute will be watched by Scientific Council which consists of scholars from Ukraine and Poland. Properly functioning Institute is the educational institution that carries out papers, expert's reports, advices for the benefit of regional economic institutions both on polish and ukrainian sides. The realization of this aim is prescribed to Centrum of European Information that will co-ordinate:

- working out of projects
- promoting of euroregional co-operation
- promoting of the process of European integration as the strategy aim of polish and ukrainian Governments
- gaining funds from European Union
- realization of grants within European union programs
- organization of postgraduate studies
- organization of conferences, seminars and open lectures
- promoting activity in the region.

Economic institutions, public administrative organs will co-operate with the Institute, ordering it to carry out expert's reports and will profit from scientific researches conducted by scholars of institute that refer to searching of prognosis of economic situation and economic development. These researches will be published in scientific bulletin of social-economic profile.

Polish-Ukrainian institute of transborder cooperation is of compatible structure to High Vocational College. In its activity it will concentrate on economic problems (department of Economic and Enterprise, Department of Infrastructure and Tourism), social problems (Department of Sociology, Linguist Department), regional problems (Department of Politics and Regional Researches), law problems (Law Department).

Institute from the very beginning will realize its mission of playing the part of euroregional and polish Ukrainian cultural center. There will be organized meeting of intellectualists people of science, culture and religion. The aim out such activity is consolidation of national identity of polish and ukrainian people. The aim of these programs is building platforms between ukrainian and polish societies, strengthening and promoting of integration processes.

Persuasion of local societies and the most important values is national identity built on strong elements of cultural heritage. This value should be supported by processes of understanding and co-operation between nations, and

especially by different forms of transborder co-operation. There will be developing of different forms of international co-operation to let the Institute be the "window" of the world, "window" of polish-ukrainian co-operation. Within this activity and financial support at the Institute, students from Ukraine could study in Poland and Polish students will have practice in Ukraine. Ukrainian research workers will have trainings in Poland and will be employed in Polish educational institutions. The possibility of studying foreign languages prove favorable to this situations. The strategical aim of Institute will afford possibilities for participation in international scientific researches. Before Institute there is a significant challenge and realization of strategical directions:

- formation of euroregional connections with social – economic institutions, self – governed authorities
- conducting of scientific researches, expert's papers
- participation in international didactic and scientific programs
- formation of team of scientific – research workers
- formation of permanent institutional structure of transborder co – operation
- lobbying for the benefit of compatibility of regional structures both on polish and ukrainian sides
- activity for the benefit of working out of fundamental directions from the point of view of development of Euroregion "San "

In the first months of 2003 State High Vocational College in Jaroslaw , 'mother' of Polish – Ukrainian Institute of transborder co – operation will organize international scientific conference, the aim of which will be working out of basic programs for future directions of its activity. Scholars from Ukraine and Poland will be invited to the conference , specialists that are working with regional problems and also economic praticians, politicians and researches of social problems.

Conclusion

1. Publication of collective work under the title "Conditions of social economic and cultural development of Euroregion "San"
2. Publication " Strategies of development of Euroregion "San"
3. Publication Strategies of development of Polish – Ukrainian Institute of transborder co- operation.

Streszczenie

EUROREGION „SAN” NOWA KONCEPCJA WSPÓŁPRACY TRANSGRANICZNEJ

Hipotezy badawcze.

1. Utworzenie euroregionu „San” ma na celu usprawnienie i zdynamizowanie współpracy transgranicznej na pograniczu polsko – ukraińskim.
2. Obszar przyszłego Euroregionu „San” należy wyłączyć z Euroregionu „Karpackiego”.

Krytyka euroregionu „Karpackiego”:

Euroregion „Karpacki” jest strukturą przestrzenną o powierzchni około 140 tys. km², czyli bardzo dużą. Jest największym terytorialnie euroregionem w Europie co poważnie ogranicza możliwości współpracy pomiędzy poszczególnymi jego obszarami. Współprace w jego obrębie utrudnia ponadto:

- duże zróżnicowanie etniczne, w jego skład wchodzi terytoria 5 państw,
- duże zróżnicowanie językowe (języki romańskie – Rumunia, ugrofiński – Węgry i słowiański – Słowacja, Ukraina, Polska),
- obszar potencjalnych konfliktów,
- w pewnym stopniu sztuczny twór terytorialny, jego powstanie warunkowane było decyzjami podjęte na szczeblu rządowym poszczególnych państw założycieli, a więc niezgodne z ideą euroregionów, których powstanie powinno być wynikiem inicjatyw lokalnych, tj. władz samorządowych, organizacji społecznych, mieszkańców,
- zróżnicowane warunki środowiska przyrodniczego, bariery hipsometryczne (góry),
- brak efektów jego działalności, w miejsce integracji pojawiają się przejawy dezintegracji. Nastąpiło osłabienie wymiany handlowej i turystycznej. Granice są trudniej przekraczalne w porównaniu z początkiem jego powstania. Nie zdołano wykreować trwałych instytucji wspierających współpracę w obrębie euroregionu.

SYMPOZJUM NAOKRĘGOWE W KRAKOWIE

Wstęp

1. Wykazano, że...

2. Głównym...

3. Wyniki...

4. Podsumowanie...

5. Wnioski...

6. Literatura...

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ABSORPTION PROBLEMS OF FUNDS FOR TRANSBORDER CO-OPERATION IN POLISH PART OF CARPATHIAN EUROREGION

Piotr SELWA

Association for the Carpathian Euroregion - Euro-Karpaty

The 19th and the 20th centuries brought frequent changes to borders in Europe, and in this way it often happened that territories of a uniform cultural and ethnic background and a similar level of economic development fell to different influence zones. Rich deposits of natural raw materials, such as coal or metal ores, were reasons for controversies and wars for borders. It also affected a differentiated level of economic development of neighbouring areas. Prolonged dissensions led to depopulation of areas in question and consequently such territories evolved into peripheral areas with limited development possibilities due to backwardness of the infrastructure. The situation was not made better by different policy carried out at the opposite sides of the border, especially concerning law, administrative solutions, and by usually weaker development of borderlands.

Communities living in borderlands, who suffered the most from effects of historical conflicts, have in their consciousness deeply enrooted mutual threats and animosities. They make difficult initiation of co-operation and its further development.

In the 1950s in Western Europe representatives of border regions started to initiate contacts in order to be able to recognise mutual problems on both sides of borders and to use liquidation possibilities of such problems due to mutual transborder co-operation. A Community initiative INTERREG was an opportunity to finance actions of that type.

This co-operation was based from its very beginning on the following fundamental principles of:

- partnership,
 - vertical
 - horizontal
- subsidiariness,
- existence of a mutual transborder concept or strategy of transborder development,

– existence of joint regional and local structures¹,

The first two principles are related inseparably. Vertical partnership is referred to relationships between individual authority levels – central, regional and local. On the other hand, horizontal partnership considers existence necessity of relationships between organizations on both sides of the border. Whereas the principle of subsidiariness assumes delegation of competence and ability to as low as possible, as well as passing initiatives “from the bottom upwards”. It is important not to treat such activities as interference into the state’s international policy and to observe the above principles during preparation of transborder concepts and strategies.

Only meeting all the presented principles allows implementing transborder co-operation into life in a successful and efficient way, and first of all using European funds allocated in this area of activities.

In our part of Europe actions aiming at transborder co-operation started on the turn of 1989. Establishment of the Carpathian Euroregion was preceded by a period of several-year animation of co-operation and contacts – chiefly of bilateral character – between border regions of the Carpathian area. A new reality, political and economic, being an effect of transformations from the early 1990s, on the one hand showed possibilities present in the regional co-operation, and on the other created practical possibilities of using them. It should be remembered that at that time both the USSR and Czechoslovakia still existed. As a result of the undertaken actions, in February 1993 in Debrecen The Interregional Union – The Carpathian Euroregion came into being. At present the Euroregion consists of territories within the Carpathian Mountains in five countries: Poland, Ukraine, Slovakia, Hungary and Romania. The Euroregion covers the area of ca. 161,000 sq. km, and is inhabited by ca. 16 million people; on the Polish side it is the area of the Podkarpackie Province and its population. The present shape is presented on the map.

From the very beginning the Carpathian Euroregion has been accompanied by lack of funds to support numerous initiatives presented by communal self-governments and non-governmental organisations. Initially the situation was to be changed by establishment of the Carpathian Fund that was to finance development of transborder co-operation. It did not play, however, the assumed role.

¹ Manual of Transborder Co-operation – The European Commission – European Association of Border Regions.



The EU assistance programme that was the first to get to the Carpathian Euroregion in 1998 was the programme Phare CREDO. Yet, strong centralisation of the programme allowed the Euroregion to participate only in the main round of the programme. Supplementary financing was acquired by one project from the Polish part of the CE in the amount of 281,000 EUR.

In 1994 the programme Phare Cross-border Cooperation (CBC) was implemented and it had been assumed that it would be a complementary programme for INTERREG IIA. It was programmed in the years 1994 - 1999. Due to its specific characteristics it was launched only at the western border as it was in the direct proximity of the EU. The budget of the programme was 55 million EUR.

The first programme that was directly addressed to the Euroregion on the Polish side, and whose implementation was actively accompanied by the Euroregional structures, was the Fund of Small Projects in the Carpathian Euroregion 1999.

The Fund was oriented to support soft projects within: cultural exchange, local democracy, human resources, studies on spatial planning and development, economic development and tourism. Within the fund 19 projects were supplementally financed, in the amounts up to 8,000 EUR, at the total amount of 114,000 EUR. It should be noted that the initial maximum amount of supplementary funding was reduced from 50,000 EUR to the mentioned 8000 EUR, due to the petitioners' total lack of experience in accomplishment of projects and in order to provide a possibility of supplementary financing of a greater number of projects.

In 1999 the administrative reform was implemented and it adapted the administrative division of Poland for the needs of the EU regional programmes. At the same time new provincial authorities at the level of self-government became aware of necessity to grant the Polish side of the Carpathian Euroregion the status of a legal person, as it was the case in Euroregions in western Poland, in order to enable it to make use of Phare CBC, programmed for the years 2000-2006. Further to a resolution by the Diet of the Podkarpackie Province, since 1 March 2001 the Polish Office of the Carpathian Euroregion has been operating within the Association for the Carpathian Euroregion "Euro-Karpaty" (Stowarzyszenie Na Rzecz Euroregionu Karpackiego „Euro-Karpaty”), which has been joined by self-governments. The construction of the Polish side of the Carpathian Euroregion followed the pattern of the solutions in the remaining Polish Euroregions. Basing the Euroregion’s administration on the Association has many advantages, and they are as follows:

- Active, resulting from membership in associations (introduction of member fees), commitment of local self-governments and entities of public, private, non-governmental sectors, operating in their areas, into the activity of the Euroregion.
- Establishment of channels for information flow (the minimum of system co-operation) between the local self-government (local community) and the Euroregion.
- Better preparation of entities from the Euroregion to use the EU assistance funds for transborder co-operation.
- Stability of the executive organs of the Euroregion (independence from political factors) – continuity of the Euroregion’s policy, a greater effectiveness.
- An increase in reaction possibilities in favour of the borderland in the regional, national and European systems (the Association – as a lobby in relation to regional, governmental and EU authorities).
- An increase, through actions of the local self-government, in social awareness of participation in the life of the Euroregion and reinforcement of social identification with a new quality of socio-economic life.
- Possibility of creating a real forum for representing interests of local communities on the national side.

Thanks to application of a self-government model, it became possible in 2001 to allow the Carpathian Euroregion as a unit that contracts and implements the programme Phare CBC SPF – Small Project Fund. The programme was implemented in its two components, one for each external border in the Podkarpackie Province.

- The integrated programme Polish Eastern Border
- The Joint Fund of Small Projects Poland - Slovakia

Based on the signed agreements with the Implementing Authority of the Border Co-operation Programme Phare in Warsaw, the Association Eurokarpaty has brought off 2 editions of the programme Phare CBC SPF so far; the amounts of money and programmes are presented in the table below.

Table 1. Assistance programmes in the Carpathian Euroregion

Programme Name	Edition	Available amount	Contracted amount
Small Project Fund Polish Eastern Border	2000 ²	250 000 EUR	250 000 EUR
Joint Fund of Small Projects Poland – Slovakia	2000	117 000 EUR	176 000 EUR ³
Small Project Fund Polish Eastern Border	2001	500 000 EUR	500 000 EUR
Joint Fund of Small Projects Poland – Slovakia	2001	140 000 EUR	--- ⁴

Source: Own work by the Author

The programme Phare SPF – Small Project Fund has been the first instrument of that type, operating according to new rules of programming and aimed at direct support of joint Polish-Ukrainian and Polish-Slovak transborder projects in the Carpathian Euroregion.

The fund supports accomplishment of “soft” projects to be implemented by local authorities, especially concerning: local democracy, economic and tourist development, culture, ecology, health, information and communication. The implemented enterprises have the character of the activity type: “people for people”.

The main aims of the Fund were⁵:

- Encouragement for creation and support of the network of transborder co-operation of local and regional units in the region covered by the programme,
- Support of small scale projects implemented by local organisations in the border region,

² It should be remembered that the edition number is not identical with the implementation year, so the edition 2000 was implemented in the years 2002/2003, and the edition 2001 – in the years 2003/2004.

³ It is an unusual situation in the EU programmes to have the contracted amount higher than the available one. It takes place due to the fact that there are more projects that have passed positively through the whole evaluation procedure than originally available funds. Only due to some endeavours funds for originally non-financed projects will be moved from the programme, where they have not been used..

⁴ No data. The programme pending evaluation.

⁵ Invitation for filing projects for the Small Project Fund – Polish Eastern Border.

- Development support for structures responsible for effective implementation and use of assistance funds.

An analysis of recruitment and further evaluation process of projects, and poll research, carried out among communes in the Podkarpackie Province, has allowed identifying critical points that make difficult use of programme funds within the Polish part of the Carpathian Euroregion. They are:

- A low level of technical preparation of the petitioners for work with the programme documentation,
- A low level of merit preparation of the petitioners (limited creativity),
- Lack of experience in transborder co-operation, conditioned by system barriers (it also concerns the border zone),
- A low level of transborder consciousness and general knowledge concerning the European Union and the European integration,
- Lacks of basic knowledge concerning assistance programmes – specifics, procedures, types, aims of individual components,
- Lack of wide, constant partnership relationships between entities of the Polish and Ukrainian sides of the Carpathian Euroregion (most of them do not have a partner on the Ukrainian side),
- A low level and intensity of co-operation between entities on the Polish and Ukrainian sides of the Carpathian Euroregion,
- Lack of adaptation of Tacis CBC SPF and Micro programmes for possibilities of Phare CBC SPF (questions of the recruitment ways, lack of coordinated actions on both sides of the border).

Despite so many problems the Polish side may boast of the best rate of the fund use: in the 2000 edition they were used totally, similarly as in the edition of the eastern programme 2001; as far as the Slovak programme is concerned, the recruitment procedures have not been finished yet.

The Carpathian Euroregions carries out further actions to counteract unfavourable phenomena making absorption of the funds difficult: it has created and is implementing the Euroregional Co-operation System as a development method of transborder and interregional co-operation by means of creating partnership of entities from the public, private and non-governmental sectors – thus making real the principle of vertical and horizontal partnership.

This is supported by creation within the Euroregional Co-operation System of mechanisms for collection, elaboration and making available information indispensable for development of co-operation – it is an Internet database of representatives from the three sectors, willing to co-operate across the border, to share their experience, projects and research.

It is important to prepare personnel for effective application for funds and carrying out transborder co-operation.

Development of co-operation is to be served by the implemented reform of the Carpathian Euroregion consisting in liquidation of formal and legal barriers connected with representation lack of 3 sectors of economy in the Council of the Carpathian Euroregion. It is important to create conditions for preparation, realisation and promotion of joint (bilateral and multilateral) transborder and interregional projects and programmes, to create an organisational, logistic and technical hinterland for the regional authorities (of the Podkarpackie Province in Poland) to realise international co-operation.

Such actions are to acquire for the Carpathian Euroregion a wide support for the promoted activities and ideas of transborder co-operation.

The 10 years of the Euroregion's existence, with the exception of the last 3 years, were a period of a long impotence and lack of possibilities for the Carpathian Euroregion to be seen by local communities.

Table 2. Evaluation of transborder co-operation so far in the Carpathian Euroregion – as per the origin country of the polled

EVALUATION OF TRANSBORDER CO-OPERATION IN CARPATHIAN EUROREGION	COUNTRY				
	Poland	Slovakia	Hungary	Romania	Ukraine
It is fully sufficient	2.0%	-	1.9%	4.5%	5.2%
It is fairly sufficient	5.2%	10.6%	1.9%	13.5%	4.5%
It is rather insufficient	38.6%	44.4%	32.5%	37.2%	50.3%
It is fully insufficient	29.4%	9.9%	39.0%	23.1%	26.4%
It is hard to say	24.8%	29.8%	22.1%	21.1%	12.3%
No data	-	5.3%	2.6%	0.6%	1.3%

Source: *Szanse i bariery współpracy transgranicznej w Euroregionie Karpackim w opinii jego mieszkańców*. Raport z badań [Opportunities of and Barriers for Transborder Co-operation in Carpathian Euroregion in Opinion of Its Inhabitants. Report from Research] – Sławomir Rębisz Uniwersytet Rzeszowski 2000

Only establishment of the Association Eurokarpaty and consequently importing Phare fund to the Podkarpacie allows starting co-operation at the expected level. In the coming future the activities so far should start bringing profits, especially that the next ones may be supported by the money from the next editions of the Small Project Fund, and specially from the Small Infra-

structure Project Fund, and it will be possible to implement tasks with easily measurable profits for the population, and not only soft projects.

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Streszczenie

PROBLEMY ABSORPCJI FUNDUSZY NA WSPÓŁPRACĘ TRANSGRANICZNĄ W POLSKIEJ CZĘŚCI EUROREGIONU KARPACKIEGO

Niniejszy artykuł traktuje o problematyce dostępności i absorpcji funduszy finansowych skierowanych na rozwój współpracy transgranicznej w Euroregionie Karpackim na przestrzeni 10 lat jego dotychczasowej działalności.

Od powstanie w 1993 roku Euroregion Karpacki miał pobudzać do współpracy transgranicznej – jednak pierwsze lata działalności nie przynosiły oczekiwanych rezultatów głównie ze względu na chroniczny brak funduszy przeznaczonych na tą działalność. Sytuację dodatkowo utrudniał brak podmiotu prawa zdolnego do zarządzania funduszem na współpracy transgranicznej, podczas gdy pozostałe polskie Euroregiony posiadały takie organizacje.

Na trwałe dostępność środków z funduszu Phare CBC SPF zapewniło stworzenie Stowarzyszenia Euro-Karpaty w 2001 roku, które w myśl obowiązujących przepisów mogło stać się jednostką zarządzającą funduszem. Stworzyło to zarazem szereg barier związanych z absorpcją funduszy. Były to między innymi słabe przygotowanie meryto-

ryczne do aplikowania o fundusze, brak doświadczonej kadry w pracy środkami pomocowym, problemy w nawiązaniu kontaktów w celu współpracy.

Pomimo tych trudności Phare obecnej chwili z funduszu Phare CBC SPF do polskiej części Euroregionu napłynęło blisko 930 000 EUR. Przyszłość powinna przynieść dalszy napływ funduszy nie tylko już na projekty „miękkie”, ale wkrótce i na inwestycje infrastrukturalne.

W tym celu należało przede wszystkim dobrać do siebie odpowiednie jednostki organizacyjne, które mogłyby w sposób efektywny i ekonomiczny wykonać zadania, które zostały im powierzone. W tym celu należało przede wszystkim dobrać do siebie odpowiednie jednostki organizacyjne, które mogłyby w sposób efektywny i ekonomiczny wykonać zadania, które zostały im powierzone.

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WSPÓLNE WYKAZOZBIORCZYSTWA

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PART V

***DIRECTIONS OF SOCIO-ECONOMIC
TRANSFORMATION IN NEW GEOPOLITICAL
CONDITIONS***

PART V

DIRECTIONS OF SOCIO-ECONOMIC
TRANSFORMATION IN NEW GEOLOGICAL
CONDITIONS

POLISH LANDS AS A CORE OF INTEGRATION OF EAST-CENTRAL EUROPE

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The geographical aspect

The role and place of Polish lands in the European space have been a matter of dispute since the beginning of the 20th century. Two academic centres: Lviv and Poznań were engaged in the dispute that gave rise to development of Polish political geography.

The idea of the dispute was raised by Wincenty Pol – the founder of the first department of geography in Poland (although better known as a poet than geographer). Indicating a transitory character of Polish lands between eastern and Western Europe, Pol put forward the conception of natural distinctness of historical Polish territory (Jędrzejczyk 1997, p. 133).

The Pol's conception was adopted and developed by Wacław Nałkowski – a geographer from Poznań, positivist and Darwinist who faithfully followed the F. Ratzel's theories. He tended to find natural features determining individuality of Polish lands. Nałkowski pointed to the transitory character of communication system and of what he called the 'classification of characteristics'. He found many analogies between Poland and Dzuńgaria - the Chinese province that he named 'a gutter of nations' that is to say a channel where, throughout the history, massive migrations conveyed ideas, innovations, political and religious influences. In 1887 he formulated the conception of transitory character of Polish lands, which was finally published in 1914 in the book entitled *The historical territory of Poland as a geographical individuality*. According to Nałkowski this transitory character manifests itself mainly, but not only, in the direction east-west. In late works of Nałkowski the term 'transitory character' was replaced by 'vagueness' which was to explain the cause of the collapse of Polish state. The Nałkowski's theory is recognised as the first Polish geopolitical conception (Jędrzejczyk, 1999, pp. 102-111).

This theory was heavily criticised by scholars from the Lviv school of geography: first by Antoni Rehman and then by Eugeniusz Romer. They blamed it for being burdened with geographical determinism voiced by Karl Ritter who explained the history of nations in terms of natural conditions. Opposing the transitory theory they formulated the 'bridge conception' that argued that favourable conditions for communication contributed to unification rather than partition of Polish lands (Jędrzejczyk, 1977, p. 141). This idea gave rise to the famous slogan 'Poland from one sea to the other' that suggested the Polish lands should play the role of an element organising the space at the base of the 'European peninsula' that is the area from the Baltic to the Black Sea (Jędrzejczyk, 1999, p. 110).

Based on deterministic premises, both above-mentioned theories have been abandoned by the contemporary science. On the other hand, it would be illicit to totally ignore the role of the environment in organising the space including its political dimension.

Two contemporary conceptions provide evidence that the 'bridge theory' has not been completely rejected. Considering the geopolitical position of Poland, Marcin Rościszewski (1999) indicated the 'Baltic-Black Sea bridge' as a core of European integration in the post-communist era. Having escaped the Soviet control, most of this area became an element of re-integration of Europe. Rościszewski emphasises the particular importance of two routes (communication corridors) of European dimension: *Via Baltica* and *Via Intermare*. Their intersection occurs actually in Poland.

The 'inter-sea' idea appears also in works by Andrzej Piskozub (1998). He discusses the role of Polish lands within the so-called European Triangle between the Atlantic, the Mediterranean Sea and Russia. In this context Poland is situated within the area under the eastern political influences. Another conception of Rościszewski referring to the idea of the 'second lung of Europe' places Poland within the inter-sea triangle among the Baltic, Adriatic and Black Seas where its position is not so definite. Also, Piskozub perceives Poland's western border, being the line that separates Germanic ethnicities from Slavic and Hungarian ones, as the vertebral column of 'Great Europe'. This term is opposed to the vertebral column of 'Little Europe' that is to say the border between Germanic and Romanic peoples. All in all, Piskozub believes that the most prospective factor for development of Polish lands is the intersection of the corridors that mark the two inter-sea areas: between the Baltic and the Adriatic and between the Baltic and the Black Sea.

It can be stated then, in the light of the above-mentioned and many other theories, that Poland has been ascribed a particular role in the process of European integration. Therefore one should attempt to define factors that make Poland so important in this process.

The **geographical** aspect, which used to be considered as the main agent of all political processes in the region, has already been exhaustively discussed. Other aspects of integration that will be examined in this paper can be classified as **territorial, political, ethnic, religious** and **cultural**.

The territorial aspect

The territorial aspect of integration appeared when Polish national ecumene - situated in the river basins of the Vistula and the Oder – started to extend to new areas (Semkowicz 1927, p. 49).

This extension was a continuation of the programme pursued by the ancestors of Duke Mieszko I. Its objective was to bring neighbouring kin tribes under subjection of the Polanes tribe, capture some sea ports (Wolin in particular), annex Pomerania, Silesia, the lands of Lebus and Wislans tribes (with Cracow), and conquer Wilcy (Luticy) - their west-Slavic neighbours. These goals were basically achieved during the reign of the early Piast rulers: Mieszko and Boleslaw (Topolski 2000) (fig. 1).

At the beginning of formation of the Polish state it acquired West Pomerania – the region won from Germany after the victory of Mieszko in the Hodon battle. This province, being a subject of political rivalry, became later a key element of westbound integration processes.

In the early 11th century, during the reign of Boleslaw the Brave, Poland extended southward by taking control over Slovakia and Moravia (table 1). Thus, according to geographers, for the first time in the history, Poland acquired the so-called '*kresy*' (frontier) that is to say an area outside natural extent of Polish ecumene, lying within different river basins (namely the Vah and Morava - tributaries of the Danube) and inhabited by foreign, although Slavic peoples.

In the same time, after the Polish-German war (1002-1005), Boleslaw the Brave conquered temporarily Lusatia, Milzen and Bohemia. The process of further integration of these lands was stopped in 1031 (Dygo *et all* 2000).

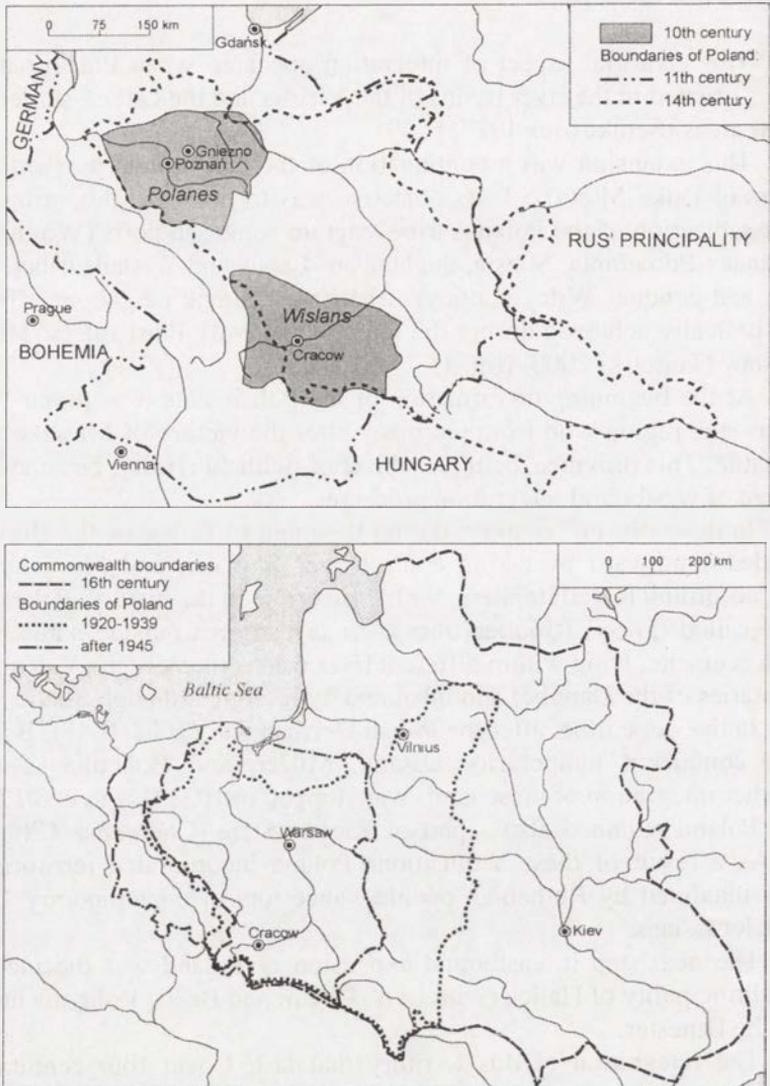
Poland regained also a part of Kievan State (Chervensk Cities), lost in 981. As a result of these acquisitions Poland incorporated territories permanently inhabited by Ruthenian peoples, ancestors of contemporary Ukrainians and Belorussians.

The next step in eastbound expansion of Poland was the incorporation of the Principality of Halich (with Lviv, Chełm and Bełz), Volhynia and Podolia up to the Dniester.

The integration of this territory that lasted over four centuries (1340-1772) comprised a part of the neighbouring ecumene, inhabited by Ruthenian population, which subsequently became partly Polonised.

In the west, Poland took away from Brandenburg the eastern part of New March, which along with Western Pomerania played a key role in this direction of European integration.

Figure 1. Territories under Polish administration (10th-20th c.)



Faced with a danger from the Teutonic Order and having in view further expansion to Ruthenian lands, Poland decided to unite with Lithuania. By signing the personal union of Krewo in 1385 Poland went a long way towards its future position of the most powerful and influential country in this part of Europe.

Table 1. Territories under Polish administration

Territory	Period of Polish administration
Bohemia	1003-1004
Chernihov Land	1385-1503, 1619-1667
Drahim	972-1018, 1113-1255, 1368-1660, 1945-
Gambia	1654-1661
Gdańsk (Danzig)	970-1038, 1119-1227, 1294-1308, 1454-1793, 1807-1815, 1945-
Chervensk Cities	1018-1031, 1069-1079, 1366-1794, 1809-1815, 1918-1939, 1944-
Livonia and Southern Estland	1561-1629
Polish Livonia	1561-1772
Irak Middle-Southern Zone	2003-
Kaffa and Kera	1462-1975
Kievan Province	1385-1667
Curland and Semigalia	1561-1794
Milsko and Lusatia	1002-1004, 1013-1031
Moldavia	1387-1497
Moravia	1003-1031
New March	970- 1013, 1113-1255, 1945-
Eastern Podolia (Bratslav)	1385-1794
Gdańsk Pomerania	970-1038, 1119-1227, 1294-1308, 1454-1772, 1920-1939, 1945-
Ślupsk Pomerania	972-1005, 1116-1307, 1945-
Western Pomerania	972-1005, 1122-1127, 1128-1181, 1945-
Santok	960-1266, 1365-1370, 1945-
Slovakia	999-1031
Spis	999-1031, 1412-1769
Silesia	990-1039, 1050-1339, 1945-
Tobago	1652-1682
Volhynia	1385-1794, 1920-1939
Bytów Land	972-1005, 1116-1307, 1410-1411, 1454-1722, 1945-
Chełmno Land	960-1226, 1466-1772, 1807-1815, 1920-1939; 1945-
Łębork Land	970- 1038, 1119-1227, 1294-1310, 1454-1772, 1945-
Lebus Land	963-1249, 1945-

Source: authors' compilation

Poland strengthened its political position by gaining control over the Baltic area, politically much diversified. By terms of the Toruń treaty (ending the Thirteen-Years War between Poland and the Teutonic Order that broke out after the annexation of Prussia) Poland obtained western part of Prussia now called Royal Prussia that included Gdańsk Pomerania and the Chełmno Land. The

remaining area was retained by the Teutonic Order as Polish fief. Later Albrecht of Hohenzollern dissolved the Order, and turned its Prussian territory into a secular duchy called 'Ducal Prussia. In 1525 in Cracow he paid the Polish king the homage thus confirming its suzerainty. This region of Poland (now called Mazuria) together with Podlasie and the Vilnius region became of key importance for the integration processes in the north-east direction. By terms of the Vilnius treaty from 1561 Livonia (now Latvia and southern Estonia) also became Polish fief.

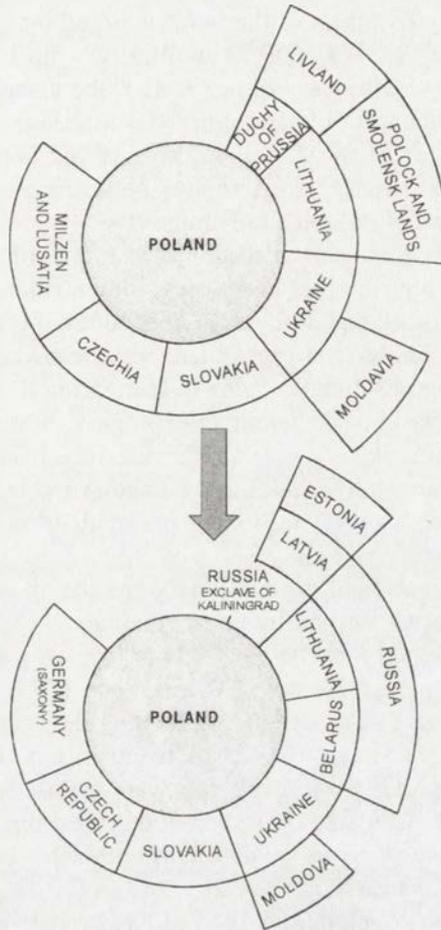
In 1569 according to the agreement with Lithuania Poland took over Podlasie, Volhynia, and the Kievan Russia (that is the area of present-day Ukraine) which remained under Polish control until the second half of the 17th century when Russia incorporated this area.

Further expansion of the Polish-Lithuanian Commonwealth to the east occurred in the 16th century during the conflict with Russia that started then to grow strong. Stefan Batory, King of Poland, managed to move military operations inside Russian territories and seized Livonia (1582) and the Polock land (1579), whereas King Wladyslaw IV took over the Smolensk region.

In the light of the above-mentioned processes it can be argued that Polish lands were, more or less durably, a core of integration of such territories as Bohemia, Moravia, Slovakia, Lusatia and Milsko (Germany), the Duchy of Halich-Vladimir, Podolia (Ukraine), Smolensk and Polock lands (present-day Russia and Belorussia) and Moldavia. Integration on a more permanent basis occurred when the Polish-Lithuanian Commonwealth originated. Poland and Lithuania constituted the core of the territorial structure of this state whereas Ukraine and Livonia (now Latvia and Estonia), situated within foreign national ecumenes, were their common possessions (fig. 2).

At the beginning of the 17th century the Polish Lithuanian Commonwealth reached the peak of its territorial expansion integrating a large part of and East-Central Europe under its rule. From that time on, despite some occasional territorial gains, a reverse process took place: neighbours dispossessed Poland of its territories during three partitions which eventually led to annihilation of Polish state. Later, Poland has never reached so strong position to be able to integrate such a big territory (over one million square kilometres). Restored in 1918, Polish state could not aspire to be a centre of integration even for a small part of East-Central Europe. During the interwar period such ambitions were typical rather for Germany and the Soviet Union.

Figure 2. Scheme of the territorial structure of Polish State (10th – 20th c.)



The political aspect

Political aspect of integration was more complex. Its course was influenced by several political pacts with other countries (dynastic unions – personal and real, oaths of allegiance) that determined the pace and degree of voluntariness of the integration.

First, political integration was achieved by marriages between the members of royal families. For instance, the pact between Mieszko and Boleslaw, Duke of Bohemia, topped by the marriage of Mieszko with Boleslaw's daughter

Dobrava in 965 laid the basis for the integration of East-Central Europe with Poland as its active participant.

Aiming at recuperation of the lands usurped by the Teutonic Order, King Wladyslaw Lokietek settled in 1320 an alliance with Hungary by marrying his daughter Elizabeth to Hungarian king Karl Robert and allied with Gediminas, Grand Duke of Lithuania, by arranging the marriage of his son Casimir and Gediminas's daughter Anna Aldona. These acts laid basis for subsequent unions between those countries (personal union between Poland and Lithuania and dynastic union between Poland and Hungary).

Of particular importance were coronations of Polish rulers as kings of neighbouring countries and vice versa other rulers coming to the Polish throne. Such events placed Poland in the centre of political arena of East-Central Europe. Wacław II, King of Bohemia, crowned Polish king in 1300, Wladyslaw III, King of Poland coming to Hungarian throne in 1440, Wladyslaw II Jagiello crowned king of Bohemia and Hungary, Stefan Batory, duke of Transylvania, elected King of Poland in 1575, monarchs from Swedish Vasa dynasty (Sigismund III, Wladyslaw IV, John II Casimir) elected to be kings of Poland provide examples of interpenetration of political influences among neighbouring states.

The above-mentioned coronations were the most real ties bringing the international integration of that time into practice.

It should be noted that the elections of foreign rulers to the Polish throne (starting from the reign of Henry of Valois since 1573) brought about different political ideologies and goals depending on the rulers' ideas and aspirations. For instance Stefan Batory aimed, first of all, to liberation of his homeland from the Turkish occupation and, as a result of the war against Muscovy, to unification of the Catholic and Orthodox Churches under the Pope's leadership. In consequence of such tendencies the lands incorporated by Poland acquired multidimensional political character.

The real union concluded in 1385 at Krewo between the Kingdom of Poland and the Grand Duchy of Lithuania was a more developed form of integration, which brought into prominence the role of Poland in this process (table 2). It was the first institutional form of integration of the East-Central Europe with participation of Poland. It was achieved thanks to the efforts of the magnates from Little Poland to strengthen the links between Poland and Lithuania – a very powerful but still pagan country. Allied with Lithuania, Poland thus became the dominating power in this part of Europe. Christianization of Lithuania was a very important element of expansion of Latin and Christian civilisation toward Eastern Europe. Baptised after the Latin rite, Lithuania entered the western cultural circle. It is worth stressing that the pact did not abolish the separateness of Poland and Lithuania (although ruled by the same king) which shows that the will and interests of Lithuania were respected. Moreover, the

next Polish-Lithuanian agreement signed at Horodlo not only confirmed the autonomy of Lithuania, but also provided for the approval of Polish king by the Lithuanian part (on the other hand, Duke of Lithuania had to be accepted by Poland). In 1445 the status of the allied states was finally reconfirmed as a 'brotherly union' of two equal partners bound up by the common ruler.

Table 2. Polish-Lithuanian unions

Date	Place	Type of union
14.08.1385	Krewo	incorporational union
18.01 – 11.03. 1401	Vilnius, Radom	personal union (feudal)
2.10.1413	Horodlo	real union
29.06.1440-26.06.1447	-	no union
1492-1499	-	no union
24.07.1499	Vilnius	real union (electoral)
1501	Mielnik	personal union (electoral)
1.07.1569	Lublin	real union (dualist federation)
16.09.1658	Hadziacz	real union (trialist federation)
3.05.1791	Warsaw	unitary constitutional monarchy

Sources: authors' compilation based on: *Tablice historyczne* 1996, s. 143; Błaszczuk 1998; Biskup 1982, s. 320-321; Chwalba 2000; Ochmański 1982, Kutrzeba 1931, s. 193-201.

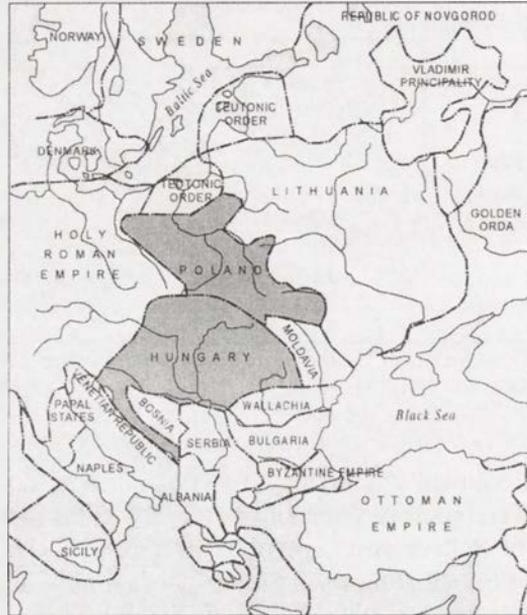
Of great political importance for Poland was an oath of allegiance of Moldavian sovereign in 1387 seeking some help in his fight against the Turks.

The role of Poland as a core of integration of the region increased after the conclusion of Polish-Hungarian union. This act provided for Wladyslaw III, King of Poland, coming to the Hungarian crown. Inviting Polish ruler to the throne, the Hungarians hoped for help from Poland, known as a mighty country, against Turkish incursions from the south. In this way the aspirations of Polish rulers to extend the Polish-Lithuanian union to the south so it embrace the southern neighbour came to fruition. The coronation of Wladyslaw III was also a renewal of Polish-Hungarian dynastic union. The death of Wladyslaw III in 1444 put an end to the idea of Polish-Hungarian union (fig. 3).

In that epoch the peoples ruled by crown heads from a few kin dynasties were not fully conscious of their national affiliation. Therefore the integrating activities greatly differed from what they are today. The political will of a ruler or the societies of the countries concerned was not always sufficient to activate some processes of integration. Very often the integration was an instrument that served the rulers to compete with other monarchs or with the Church for domination in Europe. Nevertheless, even in those periods certain universal reasons underlay the integration processes: the need for unification and co-operation among states were based on objective premises such as strengthening the defensive potential, improving the international status, stabilization. Both motivations: universal and particular one, have always co-existed and influenced the

integrating activities involving Poland, especially at the peak of its power. So, since the 15th century, when the political prestige of Poland and the Jagiellonian dynasty was growing up to the highest position in Central Europe, many neighbouring countries asked Poland for help, accepting different compromises.

Figure 3. Polish-Hungarian unions (14th and 15th c.)



Unsuccessful in building a union with Hungary, Poland found compensation in subjection of Baltic lands. In 1525 secularised Teutonic State, transformed into Ducal Prussia, became a fief Poland. In 1561 by terms of the Vilnius Treaty, a part of Livonia also came under Polish sovereignty.

In that time, however, Poland focused on integration within the existing borders of the Polish-Lithuanian state. It resulted in concluding a real union with Lithuania. The united state was a federation composed of two equal parts: the Kingdom of Poland and the Grand Duchy of Lithuania. The integration of Poland and Lithuania consisted in sharing common ruler, parliament, currency and foreign policy. The integration did not concern the matters of army, treasure and administration. The union granted the nobility the right to settle down all over the state territory – which is a basic privilege of the citizens of the European Union.

The provisions of the real union did not make an end to the eastbound integration pursued by Poland. Unfortunately, not all the arrangements were put into practice. For instance, the agreement (ratified by the parliament) settled at Hadziacz in 1658 that provided for granting Ruthenia (composed of the voivodships of Bratslaw, Kiev and Czernichov) a status of the third equal component of the federation with its own army, tribunal and offices was not carried into effect. Nevertheless, by approving this agreement the parliament showed the will to improve a very difficult international situation of Poland (among others to put an end to the Cossak wars) by means of stimulating the integration processes. Unfortunately, the partitions of Poland frustrated the constitution passed on May 3, 1791 that provided for abolition of the two distinct states and creation of one uniform state. Thus, the idea to reinforce the four-century long integration of Poland and Lithuania could not be accomplished.

New dimension in Polish internal and foreign policy was brought about by monarchs from the Swedish Vasa dynasty who ruled Poland in the years 1578-1668. They focused their reigns on the relationships with Poland's northern neighbours. Therefore the election of Sigismund III Vasa entailed new quality of the Polish-Swedish relations. His coming to the Swedish throne in 1592 (till 1598) was the first step toward integration of East-Central and Northern Europe with Poland as its element. In a long term, however, it turned out to be unsuccessful because Sweden, a Protestant country, rejected him as a Catholic king. His dethronement gave rise to serious conflicts between Poland and Sweden.

Like in the reign of the early Piast dynasty, Poland tried again to initiate political co-operation with its western neighbours. Poland got involved into western policy by signing in 1675 the Polish-Swedish convention aimed against Brandenburg. With a view to combine western and anti-Turkish policy, Poland concluded the 1683 treaty with Austria by the terms of which Polish army salvaged Vienna. Also, Poland joined the Holy League along with Austria, Venice,

papacy and Muscovy. In consequence of this policy August II of Wettin, King of Saxony, was crowned King of Poland which meant a dynastic union between both states. The union with prosperous Saxony could not help the deep political and economic crisis of Poland because the key political alliances in Europe were already established.

Taking advantage of the weakness of Poland that had lost its international prestige, the neighbouring countries strove to seize Polish lands.

The partitions of Poland that disintegrated the country, at the continental scale can be regarded as an integration. Three great states worked out a consensus concerning the organization of the European space, which was confirmed by the Petersburg treaties (August 5, 1772 and January 26, 1797). Politically speaking, at the expense of Poland, the territory spreading from the Atlantic to the Adriatic, the Black Sea up to the Pacific Ocean. This alliance, broken only temporarily by the Napoleonic wars (1806-1815) and the Prussian-Austrian conflict about Holstein (1866), survived till 1914 (as far as the western allies are concerned till 1918).

The independence of Poland regained in 1918 raised hopes for restitution of the former territory in its pre-partition extent. Joseph Pilsudski was one of the authors of this idea. As the East-Central European nations since the 19th century have endeavoured after emancipation, the only way to achieve this goal was creation of a federation. It aimed, first of all, to keep Lithuanian, Ukrainian and Belorussian lands within Polish sphere of political influence. In opposition to this idea was a model of Polish state based on incorporation policy which, unfortunately, was put into practice (Lewandowski 1962, p. 6). The policy of annexations carried out by the National Democracy prevailed. Of particular importance in this project was to impel the Lithuanian nation to restore the common state, although based on different principles. The conception of democratic federal state was in opposition to the expansive, anti-democratic model of Bolshevik federation that imperilled nation-states of Europe. The idea of the federal state found the most definite expression in the Vilnius appeal entitled 'To the citizens of the former Grand Duchy of Lithuania' published by Joseph Pilsudski in 1919 after the seizure of the city. The appeal warranted a free choice for Lithuanians as regards the future political system of their state, without any pressure from Poland (Lewandowski 1962, pp. 126-132). Regrettably, Lithuania, which opted for independence, together with other eastern nation-states fell under Bolshevik regime and became a Soviet republic. At the same time, a wrongful and inconsistent policy carried out by Polish authorities jeopardised chances for integration of East-Central Europe almost a century earlier.

The idea of federation emerged again after the defeat in September 1939. One year earlier Czechoslovakia experienced a similar tragedy so in the years 1939-1943 Polish and Czechoslovak governments in exile considered creation of the Polish-Czechoslovak Central-European Federation (Kisielewski 1991).

Its objective was both political and economic integration, which can be regarded as an anticipation of the idea of Benelux. On November 11, 1940 a Polish-Czechoslovak declaration was published in London and in 1942 the 'Principles of the Constitution of the Union between Poland and Czechoslovakia' were elaborated. The document stated that other East-Central European countries could join the union. None of the terms 'federation' and 'confederation' appeared in the documents. These plans were jeopardised by an intervention of the Soviet Union, which exerted a great influence on the policy of the Czechoslovak government in exile. After the war the authorities of the two countries tried to revive the London arrangements but again this idea was opposed by the Soviet Union (Skodlarski 1988).

The Soviet Union tended to minimise the role of Poland as a spatial core of European integration by moving it westward.

Unexpectedly, however, durable ties binding Poland with its former eastern peripheries as well as strong connection between Germany and the ex-German lands (despite nearly total displacement of German population) favoured an informal integration of German, Polish, Ukrainian and Belorussian territories. Compulsory membership in the organizations like the Council for Mutual Economic Assistance and the Warsaw Pact also led to uniformity of social life in the GDR, Poland and western Soviet republics, which was another unexpected effect. The integration achieved in this way was not restrained to several economic questions (energetic, communications, insurance system, reduction of customs); it also promoted to some extent interpersonal relations. This area was divided by admission of the former GDR to the European Union more than 10 years earlier compared to other countries. At present it tend to be integrated again.

As a fully sovereign state, Poland has not abandoned the integration policy. Actions undertaken by Poland to stop disintegration of regional relationships after the dissolution of the Council for Mutual Economic Assistance and the Warsaw Pact provided examples of such tendencies. The pursue this goal Poland actively participated in the Pentagonale (now the Central-European Initiative – a body for political co-operation of some Central-European countries), initiated in February 1991 the Visegrad Triangle (political co-operation) and the Central-European Free Trade Association (economic co-operation) in 1992. At the same time Poland endeavoured to accomplish the main process of integration of Europe – the extension of the NATO and the European Union.

The ethnic aspect

Before the Slavs came to the land between the Vistula and the Oder, this area was inhabited by Celtic tribes who settled Silesia and Little Poland. They shaped the cultural landscape of these lands by tracing trade routes, developing

metallurgy and establishing early settlements. In that time the Celts occupied a territory by far exceeding Polish lands, thus integrating a large section of the continent (Woźniak 1994).

At the beginning of the Christian era Polish lands were inhabited by Wends (as it is mentioned by Tacitus, Pliny, and Ptolemy) (Kmieciński 1988, p. 67) who reached down to the Adriatic thus integrating an extensive area (Wolfram 1996, p. 59). According to some opinions they could be considered as Slavic people (Leciejewicz 1989, p. 25). At the same time the Goths from Scandinavia came up, followed by Bastarns and Gepids who traversed Poland on their way to the Black Sea (2nd-3rd c.) from where in the 5th century they invaded the Roman Empire (already as Visigoths and Ostrogoths) (Batowski 1948, p. 13). Some other German and Celtic peoples like Heruls, Burgunds, Longobards, Lugians, and Vandals temporarily came up on Polish lands (Zientara 1985, p. 47).

Each of the above-mentioned peoples brought about to Polish lands some cultural, linguistic and religious elements developed in other parts of the continent. On the other hand, while leaving these peoples transferred to neighbouring territories some elements formed on Polish lands.

It is still disputable where the Slavic group emerged from the ethnic mosaic. Some scholars indicate southern Ukraine, whereas others point to Polish lands (Samsonowicz 2000, p. 22). Lacking Finno-Ugric linguistic traces in Slavic languages, the hypothesis of western ethnogenesis seems to be better-grounded (Wyrozumski 1983, p. 64). According to some views, the Lusatian culture would be a product of Slavs (or pre-Slavs). Nevertheless, several arguments suggest that the Slavs have occupied Polish lands since the 5th or 6th century, except the upper basin of the San River, which was previously already inhabited by Slavs of south-Ukrainian origin. Notwithstanding, it can be safely asserted that no state organism existed on Polish lands prior to the arrival of the Slavs.

The west-Slavic settlement can be divided into two groups differing as to their genesis: 1. On Polish lands; 2. in the Elbe basin, on Czech and Slovak lands where organised Slavic settlement appeared only in the 5th century. The Slavic settlement in East-Central and Southern Europe created a new space of integration reaching from the White Sea through the Baltic, the Adriatic, up to the Black Sea and the Aegean Sea.

Polish lands were also home to other Slavic peoples and tribes of Baltic provenience. This group included the Serbs who inhabited the upper basin of the Neisse River, and the Croats coming from upper basins of the Nysa Kłodzka and the Oder. The two tribes migrated southward and peopled the Adriatic coast. Thus, a cultural bridge was formed that facilitated subsequent integration, which assumed the form of pan-Slavism.

The process of integration of Polish lands consisted not only in annexing new territories to Polish national ecumene; the ethnic dimension of the process was not left out of account. It became particularly apparent in the Polish-Lithuanian Commonwealth where different ethnic groups and nations co-existed beside the two political nations: Polish and Lithuanian. Conquered by Lithuania (partly by Poland), the eastern and south-eastern periphery was peopled by the Ruthenians (ancestors of the present-day Belorussians and Ukrainians). Amid this native population were many enclaves of allochthonous people: Poles, Jews, Germans, Armenians and Greeks. They arose chiefly around town because the new colonisation was of urban character. In addition to that there were some dispersed groups of refugees from bordering countries (Wallachians and Moldavians), settled captives (Tatars), mercenaries who stayed after their military service was finished (Scots, Circassians), and others Koter, Kulesza 2001).

The ethnic composition in the southern part of the Grand Duchy of Lithuania was also quite complex as the result of Polish settlement and, as it was mentioned before, Polonisation of Lithuanian elite. Here, beside numerous urban enclaves, many dense clusters of Polish-speaking population sprang, both in towns and in the countryside, accompanied by Jews, to a lesser degree Germans, Karaites, and Tatars who enrolled for service in Polish army.

In population in Prussia was predominantly German, whereas Livonia that is the northern peripheries conquered by Poland in the 17th century were inhabited by Latvians, Estonians, Livonians, and Germans (stemming from the former Livonian Order).

It is worth noting that ethnic issues instigated sometimes some tendencies to disintegration of the Polish-Lithuanian Commonwealth. For instance, the integration of Ukraine with Polish state failed in result of conflicts with Cossak community that since the second half of the 16th century played an important part in the province.

The religious and cultural aspects

Poland has also contributed to the integration of Europe in the sphere of religion, especially in the east. Definitely, of particular importance here was the Christianization of Poland in 966, an event of far-reaching consequences both for Poland and the integration of East-Central Europe. Politically, this act brought a stabilisation of the Polish state. Christianity was an ideology conveying a civilisational progress. It was also an additional element bringing people closer together. By adopting the Christian religion Poland entered the sphere of western culture, which thus expanded, thanks to Poland, to other East-Central European territories (the St. Adalbert's mission to pagan Prussia provides an example). Religious considerations were also behind the integration of the Grand Duchy of Lithuania with Poland.

Later, in modern times, a religious context still played a part in the processes of integration, for example when Poland imported the achievements of great intellectual movement spreading in Western Europe. However, as regards religious matters, there was a fundamental difference between Poland and other European countries: Poland enjoyed religious freedom and tolerance that stemmed from the ideology of 'liberty and equality' among the noble class. Poland welcomed different religious ideas. The followers of Reformation occurred not only in western and central Poland but also on its eastern outskirts. Their number was growing despite a ban on new religions imposed by King Sigismund the Old. King Sigismund August recalled the prohibition which earned Poland good reputation for the religious tolerance.

The religious tolerance in Poland was warranted by the Warsaw Confederation concluded in 1573. This arrangement was included into the so-called Henry's articles – a charter with fundamental political laws of the Commonwealth. Every successive monarch was obliged under oath to respect them. Among the main Protestant denominations the Lutheranism and the Calvinism were the most widespread: the former particularly among the townsfolk and in Royal Prussia, the latter mainly among nobility, among others in Lithuania. The main branches of Reformation subsequently developed into many minority churches that more or less peacefully co-existed with other Christian religions.

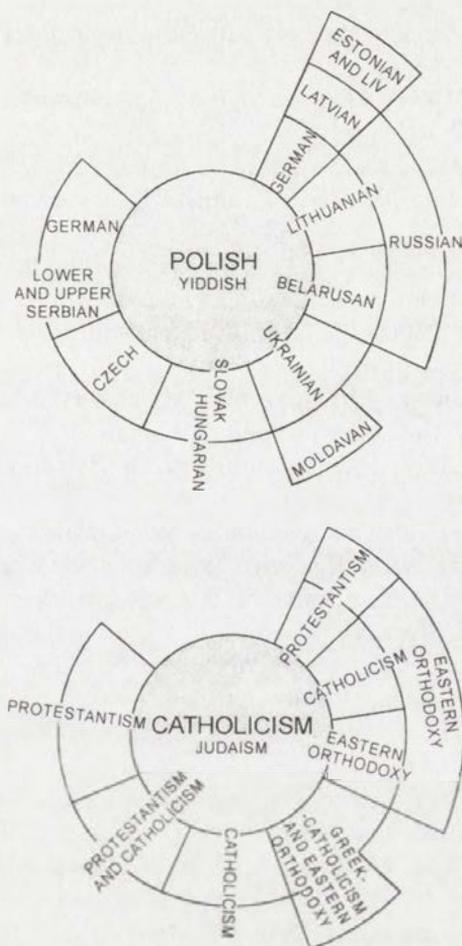
Notwithstanding the generally tolerant atmosphere, which favoured an integration of ethnically and religiously diversified Polish lands, some manifestations of intolerance connected with the Counter-Reformation occurred. The Jesuits, who extended their activity to prevalingly orthodox areas in south-eastern Poland, managed to convert into the Catholicism a part of nobility and magnates.

In the first half of the 17th century in eastern provinces of the Polish-Lithuanian Commonwealth nearly all high-noble class converted from the Orthodox to the Catholic faith. It can be regarded, in a way, as a process promoting integration because the high-rank nobility residing in the east was thus more closely connected with Poland, which can not be said of other social classes.

Changes in self-consciousness led to the idea of a Catholic nation, still understood as a community of noblemen. That was to say that only Catholic nobles were considered proper representatives of Polish nation. Gradually, the identification of Polishness with the Catholicism enforced by the Jesuits became an idea that consolidated the noblemen's nation. People of other religions were cast out by the society, which deformed the community's identity and hindered initiatives of the state aiming at integration. The Counter-Reformation instigated also a reaction of the Orthodox Church. Religious brotherhoods were established and the laymen gained more influence in the Orthodox Church in order to raise its intellectual level.

A particular phenomenon in the sphere of religious relations in the Polish-Lithuanian Commonwealth was a union of the Catholicism and the Orthodox Church called the Union of Brest proclaimed in 1596. This specific act of integration resulted from the will of most of the Orthodox clergy in Poland who were open to western civilisation. The Uniates kept the Eastern rite but recognised the pope's leadership. This agreement had its political consequences, too: Poland managed to attached more closely the territories claimed by Russian tsars who usurped sovereignty over all Orthodox world, including the Orthodox Church in Poland.

Figure 4. Scheme of the language and religious structure of Polish State (10th – 20th c.)



This opening of the eastern culture toward the West had also some negative implications: the situation of the Orthodox Church in Poland worsened. It should be stressed that, contrary to accusations made by Protestant countries at the beginning of the 17th century, Poland has never been a venue of religious wars and persecutions. It was one of the most positive consequences of the integration of the territory of the Polish-Lithuanian Commonwealth inhabited by different ethnic and religious groups (fig. 4).

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Streszczenie

ZIEMIE POLSKIE JAKO JĄDRO INTEGRACJI EUROPY ŚRODKOWO-WSCHODNIEJ

Rola ziem polskich w przestrzeni środkowoeuropejskiej stanowi od niemal wieku, przedmiot licznych dyskusji naukowych, a czasem wręcz gorących sporów. Zapoczątkował ją Wincenty Pol, wskazując na przejściowość cech geograficznych ziem polskich. Dyskurs wiedli Waław Nałkowski z Poznania i Eugeniusz Romer ze Lwowa, spierając się o przejściowy względnie pomostowy charakter ziem Rzeczypospolitej i wywodząc z niego tragizm losów państwa bądź upatrując w nim szansy na rolę mocarstwową (idea międzymorza). Współcześnie problem ten wywołali m.in. Marcin Rościszewski oraz Andrzej Piskozub, obaj opowiadając się raczej za położeniem pomostowym, widzianym jako szansa dla rozwoju i asumpt do jednoczenia wokół naszego terytorium całego regionu środkowo i wschodnioeuropejskiego.

Autorzy niniejszego artykułu dostrzegają cztery płaszczyzny integracji, w których można rozpatrywać rolę ziem polskich w procesie integracji Europy Środkowo-

Wschodniej. Są to płaszczyzny: geograficzna, terytorialna, polityczna, etniczna i religijno-kulturowa.

W dalszych częściach artykułu kolejno rozważa się te płaszczyzny integracji. Autorzy wskazują na wyczerpanie się płaszczyzny geograficznej, czego dowodzi też wygaśnięcie długotrwałego sporu w tej materii. W płaszczyźnie terytorialnej ukazana jest rola obszaru znajdującego się w różnych okresach historycznych w polskim władaniu (tab. 1, ryc.1) i znaczenie tego faktu dla przyszłych procesów integracyjnych. Autorzy ukazują także polityczny aspekt zagadnienia, rozważają wkład I, II i III Rzeczypospolitej w kształtowanie się ustroju regionu, tworzenie unii monarchicznych, idei federacyjnych i organizacji ponadregionalnych (tab. 2, ryc. 3).

Kolejny fragment artykułu poświęcono znaczeniu zróżnicowania etnicznego, wielonarodowej tradycji polskiej państwowości w procesie integracji omawianego fragmentu Europy.

Nie bez znaczenia jest także wymiar religijny i kulturowy roli ziem polskich w procesie europejskiej integracji, wielokulturowość kolejnych Rzeczypospolitych, tradycje tolerancji religijnej i wpływ polskiej kultury bazującej na dorobku europejskiej kultury łacińsko-chrześcijańskiej, zachodnich wzorców kulturowych, umiłowania demokracji i niezmiennej woli walki o nią tak dla siebie jak i dla innych. Wszystkie te elementy sprawiają iż rola ziem polskich w procesie integracji Europy Środkowo-Wschodniej jest znacząca a nasze terytorium można określić jako jądro owej integracji.

W konkluzji autorzy konstruują model powiązań pomiędzy strukturą terytorialną, lingwistyczną i religijną historycznej Rzeczypospolitej a analogicznymi strukturami współczesnymi (ryc. 2, 4).

The first part of the paper discusses the importance of the concept of 'good' in education. It argues that the concept of 'good' is central to the philosophy of education and that it is essential to understand what is meant by 'good' in order to understand education. The second part of the paper discusses the concept of 'virtue' and its role in education. It argues that the concept of 'virtue' is central to the philosophy of education and that it is essential to understand what is meant by 'virtue' in order to understand education. The third part of the paper discusses the concept of 'wisdom' and its role in education. It argues that the concept of 'wisdom' is central to the philosophy of education and that it is essential to understand what is meant by 'wisdom' in order to understand education. The fourth part of the paper discusses the concept of 'justice' and its role in education. It argues that the concept of 'justice' is central to the philosophy of education and that it is essential to understand what is meant by 'justice' in order to understand education. The fifth part of the paper discusses the concept of 'truth' and its role in education. It argues that the concept of 'truth' is central to the philosophy of education and that it is essential to understand what is meant by 'truth' in order to understand education. The sixth part of the paper discusses the concept of 'beauty' and its role in education. It argues that the concept of 'beauty' is central to the philosophy of education and that it is essential to understand what is meant by 'beauty' in order to understand education. The seventh part of the paper discusses the concept of 'goodness' and its role in education. It argues that the concept of 'goodness' is central to the philosophy of education and that it is essential to understand what is meant by 'goodness' in order to understand education. The eighth part of the paper discusses the concept of 'wisdom' and its role in education. It argues that the concept of 'wisdom' is central to the philosophy of education and that it is essential to understand what is meant by 'wisdom' in order to understand education. The ninth part of the paper discusses the concept of 'justice' and its role in education. It argues that the concept of 'justice' is central to the philosophy of education and that it is essential to understand what is meant by 'justice' in order to understand education. The tenth part of the paper discusses the concept of 'truth' and its role in education. It argues that the concept of 'truth' is central to the philosophy of education and that it is essential to understand what is meant by 'truth' in order to understand education. The eleventh part of the paper discusses the concept of 'beauty' and its role in education. It argues that the concept of 'beauty' is central to the philosophy of education and that it is essential to understand what is meant by 'beauty' in order to understand education. The twelfth part of the paper discusses the concept of 'goodness' and its role in education. It argues that the concept of 'goodness' is central to the philosophy of education and that it is essential to understand what is meant by 'goodness' in order to understand education.

INTEGRATION OF THE POLISH LANDS WITH THE NEIGHBOURING STATES IN XIX CENTURY

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Introduction

Republic of Poland is to become a member of the European Community on 1 May 2004. For the time being no one may predict what ultimate structural shape will adopt that organisation. On the one hand, EU may remain the space of economic co-operation. On the other hand, however, It may transform into a political union. The latter direction for EU policy is postulated by numerous lobby groups. The emergence of the Federation of European States would mean a creation of a super-state. Poland would become one of its integral parts. It would not be, however, the first case of that type in the history of Poland. Nevertheless between XIV and the end of XX centuries the eastward direction of integration was prevailing.

The Commonwealth of Both the Nations (Polish-Lithuanian state) and the establishment of the Congress of Vienna order

One of the largest states in terms of size in the history of Europe was the Commonwealth of both the nations. It was created in 1569 as a result of the Union of Lublin. Apart from its basic segments – Kingdom of Poland and Grand Duchy of Lithuania – it included lesser and less significant state's organisms, such as Duchy of Prussia and Duchy of Courland, both of them having feudal status, or Siewierz Principality (Księstwo Siewierskie) episcopal lands owned by Cracow bishops. In 1658 the Hadiacz agreement was reached whereby another Commonwealth's integral part was set apart within the area of the present Ukraine, that is Ruthenian Principality (Księstwo Ruskie). However, it has to be admitted that these decisions were never put into effect. The area of the then Commonwealth encompassed also a number of territories, which were not regarded as states in the meaning of the international law, but they often matched them in size and significance. It refers in particular to large land properties owned by the nobility (for example: Zamojski latifundium,

“Łubniowski State”), the church (e.g.: Łowicz Principality, Warmia Principality, the so-called Pułtusk Principality), towns (Gdańsk, Toruń, Elbląg). The political disintegration, which was an effect of still present in Poland feudal system, led eventually to the collapse of the Commonwealth. Also, no political centre was formed that would have managed to play a state-forming role replacing the frail Commonwealth’s structure (such as Prussia or Austria in Reich). One of the symptoms of the oncoming collapse were territorial losses. Russia was greatly benefited by tearing from Poland more and more pieces of land. Another step in the Commonwealth’s demise was the growing political dependence. Not only Poland’s close neighbours but also distant states (e.g. France) were interfering in its internal matters. Russia played a dominant role in this process. In 1717 the Commonwealth became de facto a Russian protectorate as a result of so called “Dumb Parliament” decisions. Poland changed its role on the political arena. It was no longer a driving force behind integration but became a mere pawn.

The culmination of this process were the partitions of the Commonwealth. In the face of its own powerlessness to create a strong centre of power that would have helped to establish the state’s order within the area of the Commonwealth, it was natural that this responsibility was assumed by the neighbouring states. In contrast to the situation in Poland, they had the adequate system of power at their disposal. The Russian dominance did not prevent the claims to Polish lands on the part of other states. On the contrary, the Russia’s increasing power was their subject of concern and prompted them to demand compensations. Another reasons for worry were gathering in strength patriotic and revolutionary movements in Poland. Russia acting alone would not have been able to handle these problems. The realisation of idea of Partitions can be described as a compromise reached to satisfy the interests of the three European powers. At the same time they aimed at eliminating the problem of Poland. According to agreement its name was to be erased from a political map. The particular segments of the former Commonwealth were given the new names by the partitioners, such as the Southern Prussia, Kingdom of Galicia or Western Land, and were incorporated by the three monarchs. The partitions were conducted in an unfavourable international situation for Poland. Alongside with a sudden change of state of affairs it turned out in the course of time that it is impossible to ignore the existence of such a large historic nation at the centre of Europe (see: Cegielski and Kądziała 1990, Davies 1995)

The order established by the means of the partitions arrangement survived only twelve years. Its significance consists in the fact that it ultimately brought the Commonwealth’s existence to an end. Apart from that, it paved the way for seeking other solutions for Poland and its territorial and state organisations. Prussia and Austria’s defeat at the hands of the French army helped to create Duchy of Warsaw (Polish state which was the French protectorate) that

consisted in large part of Prussia and Austria's partitions. Its area was taken in 1813 by the Russian army. The status of the Polish lands was finally determined by the terms of the Congress of Vienna decisions (1815). Eastern part of the former Commonwealth, including Lithuanian and Ruthenian lands, taken gradually by Russia in years 1772-1807, was incorporated by the Russian Tsardom under the name of the Western Land. Western part of the former Commonwealth – Royal Prussia and Poznań Region – were annexed to Prussian state. Royal Prussia became its integral part, whereas Poznań region on the strength of the Congress of Vienna became an autonomic province as a Grand Duchy of Poznań. Southern part of the former Commonwealth, as it was established in 1772, remained within the Habsburg monarchy as a Kingdom of Galicia. Cracow along with the surrounding area was proclaimed a Free City being under control of the three powers. In 1846 it was included into the Kingdom of Galicia. On the remaining considerably reduced part of the former Commonwealth, which constituted essential part of Duchy of Warsaw, was re-established the Kingdom of Poland with its capital in Warsaw. This state was linked together with Russia Tsardom through a personal union (King of Poland and Tsar of Russia).

As a result of these decisions, which were in force for 100 years, 65% of the area of the Commonwealth of before 1772 was incorporated by Russia. In addition to subject to Russia the Kingdom of Poland, the Russian gains constituted 82 % of the area of the former Commonwealth. When the new borders of Russia are compared with the territory of the Commonwealth of 1622, then it can be noticed that area gained by Russia throughout 200 years preceding the Congress of Vienna amounted to 84%. Correspondingly, Austria's acquisition's amounted to 11% and 7,5% respectively, whereas Prussia's ones equalled 7,5% and 8% respectively. These numbers prove clearly that due to the establishing of the new order Russia achieved huge success. Extent of Russia's influence was little different to the one existing after the first partition. The only difference was that the Lithuanian and Ruthenian lands became integral part of Russia, and in the remaining area the renewed Kingdom of Poland was formed with the Russian rulers as its hereditary monarchs. The actual state of affairs existing at the end of XVIII century was confirmed in the beginning of XIX century by terms of the international treaties. Formal state bonds replaced Russian domination. The other powers had to content themselves with only the scraps of the former Commonwealth. Thus, the Russia played the most active role in the integration of the lands of the former Commonwealth. So one can speak of the still prevailing eastward direction for the Poland's integration. However, Poland was no longer a subject of the integration processes but merely an object.

The territorial and state arrangements that were made in this way, filled the void which was left by the Commonwealth experiencing political and structural crisis. It was not the ideal model for the Polish patriots, but this reflected the actual political balance. The Polish lands were subjected to forcible

state integration on the part of the neighbouring governmental machines. It was impossible, however, to deny the rights of the people of Poland, as it was planned previously by the partitioners in 1795. The name and the Polish statehood were retained, though in a limited way, in terms of a territory and sovereignty. The established governmental system in the restored Kingdom was to some extent an implementation of the ideas cherished by the Polish reformists. Thus, the structure of the state was modified. Poland became a constitutional hereditary monarchy, what was the main reformists' postulate and was included into the contents of the 3 May Constitution. However, hereditary monarchs became not Wettins, but representative of the ruling Russian dynasty Holstein-Gottorp-Romanov. The Kingdom of Poland still continued to cherish the traditions of the Polish statehood, however in different situation. Moreover, its structure combined the traditions of the former Commonwealth, 3 May Constitution reformatory resolutions, administrative reforms introduced by the partitioners and the structure of Duchy of Warsaw.

The decisions adopted at the Congress of Vienna guaranteed respect for the Polish national rights, also outside the borders of the Kingdom and Cracow, in the areas that were (before 1772) part of the Commonwealth. In each of its former parts the Polish national institutions were to be formed. Thus, the new territorial and state system was developing, which was supposed to organise the life of the Polish society after the collapse of the Commonwealth.

The strength of a distinction characterising the Polish society, expressed in economic and social significance of the Polish nobility and patriotic movements, forced the partitioners to respect at least part of the national aspirations of the Poles. The resolutions adopted at the Congress of Vienna established territorial and state order for that survived 100 years on the territory of the former Commonwealth. This political and territorial order formed in the period 1772-1815 was later gradually evolving. It was only when the First World War started that this order was broken. For that reason it can be claimed that national Polish state was created not on the basis of the Commonwealth, but on the basis of the order that replaced it in the last period of the feudal epoch. The contemporary political system in Poland bears a lot of resemblance to the tradition of Duchy of Warsaw and the Kingdom of Poland rather than to the traditions of the first Commonwealth.

Kingdom of Poland

Decisions made at the Congress of Vienna, proclaimed that the Kingdom of Poland would be linked together with Tsardom of Russia through a personal union and the constitution, stipulating also that it would possess separate central power. Nevertheless, the distinctions of political structure and tradition between the two states led to the conflict between them. In response, there were taken

unifying measures aimed at combining the system of power in the Kingdom of Poland with the correspondent system in the Tsardom. Consequently, the Kingdom of Poland was becoming increasingly integrated within the common monarch. Polish uprisings were a manifestation of protest, but they did not manage to avert this tendency. Gradual personal union was replaced by a true one. The first change of the Kingdom's status was approved in 1832. The then proclaimed organic statute (*statut organiczny*), constituting the amendment to the Constitution of 1815, united the Kingdom with Tsardom by means of even stronger bonds. Another step was taken at the end of the 60s (XIX century) and manifested itself by abolishment of the Kingdom's central institutions. From that time onwards the Kingdom (similarly to the Tsardom) was ruled directly from Petersburg. One can speak of administrative unification with the Tsardom. This fact constituted a serious breach of the Kingdom's basic statute (that is, organic statute), which was not replaced by equivalent statute, and the international treaties (resolutions adopted at the Congress of Vienna). Formally, (according to Russian legislature and international treaties) the Kingdom still enjoyed separate statehood. The Russian book of laws stated separation of the Polish throne, however, it was indissolubly linked together with the Russian throne. It underlined also the distinction as regards the coronation act of a Polish king, which was merely included into the general enthronement act. This legal system was reflected to some extent in practice. The Russian monarch used the title of the Polish king in the honourable second place, after the title of the Tsar of All Russia and before the title of the Grand Duke of Finland. The name "Kingdom of Poland" was also still in use, however, at the same time the name "The Land of the Vistula" was used since 1883. The Kingdom retained also a number of legal and structural distinctions (e.g. French civil law) and organisation of socio-economic life (e.g. separate structure of rural areas). There remained also a few separate institutions, though they did not have much political significance (e.g. Attorney General of The Kingdom of Poland) (see: Berg 1898, Dymśa 1911, Chomiak 1999 Groniowski and Skowronek 1987 Hahn 1987, Korobowicz and Witkowski 1998, Radziwiłł and Winiarski 1915).

These complicated circumstances make it difficult to define the legal and state status of the Kingdom of Poland throughout the half of the century preceding the First World War. Its administration was fully integrated with the Tsardom of Russia, but taking into consideration its legal and state status together with its structure of socio-economic life, the Kingdom of Poland continued to maintain the separate character. One can speak of maximal strengthening of the real union and of existence of the superior state form, encompassing both the Tsardom and the Kingdom (organic statute mentioned e.g. uniting Polish and Russian armies, but not inclusion of the Polish forces into the Russian ones). With quantitative and political superiority, Russia and Russian elements played a dominant role in this structure. Even in the Kingdom Russian became eventu-

ally the official language and the Polish tongue fulfilled only the auxiliary functions. However, awareness of the impossibility of full integration of the Kingdom with Russia was a reason for devising the project whereby the Kingdom's eastern peripheral territories, composed of mixed nationalities, were annexed to the Tsardom.

The then system of relations between Poland and Russia can be perceived as a model for the later Soviet Union and the entire soviet camp, placed in the totally different historic context. Tsardom of Russia would correspond to Russian Federation and the Kingdom of Poland (similarly to Grand Duchy of Finland) to one of the later Soviet Republic. Fortunately, Poland avoided this fate (as well as Finland), but other countries that were linked previously with The Russian Tsardom (such as Baltic states) became integral part of the Soviet Union.

The history of the Kingdom of Poland seems to be of extreme importance, as it was a continuation of Polish national traditions, and it concerned the largest and centrally located part of the Polish ethnic area together with a traditional centre of national life which Warsaw was. The eastern peripheral territories became excluded from the Kingdom, since they belonged to those administrative units where the Polish elements did not establish quantitative domination over the other ethnic groups. In Galicia almost half of the population constituted Ruthenians-Ukrainians, in the Prussian partition (Poznań and Western Prussia) Germans. In 1918 when the three Empires collapsed, the Kingdom's governmental machine took on the responsibility of integrating the Polish lands, which was possible due to goodwill of the Central Powers. The Polish state existing in the years 1944-1989 and being a satellite of the Soviet Union in some way continued the traditions of the Congressional Kingdom (see: Jasionica 1992, Kowalski 2001, Wapiński 1994).

The Western Land

The Lithuanian-Ruthenian lands were unified with the Russian Tsardom. However, they retained a cultural, self-governmental and judicial autonomy for a long period of time. The Polish language continued to be an official language and Polish education still functioned. The nobility in addition to the territorial government, preserved also control over the judicial power, which was based on the Lithuanian Statute. Among the local officers of the province the Poles were in majority. To add more, most of the governors were also of Polish nationality. The separate Lithuanian army corps, together with the army of the Kingdom of Poland, was under the joint control of Grand Duke Constantine. Throughout some time tsar Alexander I was considering the re-establishment of Grand Duchy of Lithuania and later even the possibility of uniting the large part of the Western Land with the Kingdom of Poland. The unification measures aimed at closer integration with Russia were taken as late as in the 30s in the XIX cen-

ture. The Uniate Church was abolished and converted to Eastern Orthodox. Furthermore, the Polish education, including University of Vilnius, was suppressed. However, the kingdom retained a few autonomous rights, such as the Polish language and privileges for polonized nobility. A true unification with depolonization of administration and the public life began only after the insurrection of 1863. The Russian influences started to dominate the Polish ones, which was facilitated by a lack of Polish national awareness among the lower strata of society. However, the Polish nobility managed to maintain strong socio-economic position despite the repression. That was a chief obstacle to granting the local elite the same rights that possessed the residents of the Russian provinces. The integration processes were also hampered by national aspirations among the local lower strata of people such as the Lithuanians, Ukrainians and Belarussians. In opposition to the official policy of Russian power, the process of polonization started directed at people living within the Polish, Lithuanian and Belarussian borderland (the neighbourhood of Grodno and Vilnius). Thus, it is difficult to speak of the full integration of those territories with the Russian state. After the collapse of the empire the processes of forming the new national states including Lithuania, Ukraine or Belarus started to accelerate. Not surprisingly, even after the annexation of these territories to the soviet Russian they were granted autonomy. The Polish state that was re-established in 1918 managed to take control of the western most polonized part of that region. After 1945, however, Poland kept only the Białostok region within its borders (see: Jurkowski 2001, Kieniewicz 1987, Korobowicz and Witkowski 1998, Zasztowt 1997).

Kingdom of Galicia

The Kingdom of Galicia was established in 1772. It consisted of this part of the former Commonwealth territories which were annexed to Habsburg state. The new province gained the same status as other territorial units (Archduchy of Austria, Kingdom of Hungary, Kingdom of Czech). In contrast to the Congressional Kingdom, or, in the later the period, to the Kingdom of Hungary, Galicia did not get the separate national status. The later efforts to acquire such status did not bring desirable results. It remained the integral part of the Austrian state until the end of its existence. Initially, in spite of the decisions of the Vienna Congress, the Polish character of the kingdom was not revealed. Centralistic tendencies dominated, in which the main role played the German elements. Only in view of the former traditions as well as a dominant role of the Polish population, and above all, a social and political role of the Polish nobility, the Polish language retained some privileges (e.g. in judiciary or in national lower house of parliament). This state of affairs started to undergo some change just after the Springtide of Nations of 1848 and was also caused by the general

tendency of liberalization as well as the fact of growing aspirations on the part of the non-Germanic national groups within the monarchy. In the face of the threat coming from the German and Czech liberals, the Galician nobility became one of most important pillars of the throne. The main asset of the Polish elite was conservatism as well as a lack of German settlement in the area of Galicia (as opposed to Czech territories). The Poles, German and Hungarian were one of the nations that had their representatives in the monarchy government. Although the Poles were not successful, just as Hungarians, in establishing the separate state, they managed to become the co-hosts of the Austrian state, as well as the Austro-Hungarian monarchy. Since 1871 at least one Pole came in the government (as a minister of Galicia matters). The Poles held a position of a Prime Minister three times (secretary of state or Prime Minister). The Kingdom of Galicia acquired a wide autonomy. The Polish language became the official one in almost all areas of the public life. The Galician lower house of the parliament and representing it the National Department attained considerable influence on the formation of socio-economic reality. The same concerned the all levels of the local authority. For that reason, Galicia constituted the supplementation of highly qualified people in addition to the Kingdom of Poland, which was more distinguished in terms of the legislative status, but was subjected to the process of Russification as regards its structure and culture. At the moment of the collapse of the Austrian monarchy, nobody questioned the Polish identity of the western part of Galicia, and its social potential was an extremely important element which strengthened the formation of the Polish national state (see: Davies 1995, Grodziski 1971, Grodziski S 1990).

The Prussian Partition

Miscellaneous character of the Polish territories that were annexed to Prussia made it difficult to accept their Polish autonomy guaranteed by the decisions of the Congress of Vienna. This was a typical ethnic borderland, where the Polish and German influences were closely intertwined. The Polish ethnic area separated the basic ethnic German territory from the East Prussia, which was one of the cradles of the state. The Poles seemed to present a serious threat to the integrity of the state and to the idea of the German national unification. The large part of areas granted to Prussia that was dominated by the German population, was integrated with the Prussian national system. It concerned the former Royal Prussia, which became the main territory of the Western Prussia province. These territories secured territorial contact among the Eastern Prussia and the rest of the state. On the remaining area there was established Grand Duchy of Poznań. It was to bear the Polish national character, as a feud of a Prussian king. However, the Germans constituted about 30 % of the entire population, what made it difficult to accept and maintain its Polish character. In

the first period the Polish language was given the status of the official language, and the authorities appointed a Polish governor. However, the power of balance on the European political scene was not conducive to development of its autonomy. During European Revolutions 1848-1849, there was put forward the project of Duchy division into German part (with Poznań) and Polish part (with Gniezno). It was not put into effect, however, and undivided province was even strongly integrated with the Prussian state. When the German Empire (1871) was established, there were abolished the remaining rights confirming the Polish character of the province. This concerned the use of the Polish language in public institutions and on official documents (schools, offices, notarial offices). However, not the all structural solutions were implemented typical of the other Prussian province because that would enable the Poles to dominate some institutions. It is difficult to speak of the complete integration of the region with the German state. It could have been reached only by attaining the quantitative superiority over the Polish population. It was aimed to be reached by instilling social German national consciousness and strengthening the German element by the means of settlement initiatives. "The Longest war of modern Europe" continued. German's defeat in the First and in the Second World Wars put an end to the borderland process of within the German state. The whole controversial area, and even genuine German territories, for a long time connected with the German and Prussian state, were definitely part of Poland. Their renewed integration began, this time within the Polish state (see: Korobowicz and Witkowski 1998, Krasuski 1989).

Conclusion

In the period between 1815 and 1918, similarly to the period of the Commonwealth's existence, the eastern direction for the processes of integration dominated. The Polish Kingdom continued in the changed conditions the traditions of the Polish state, It was united with the Russian Empire by the means of the national union. To a larger extent it can be said about the Ruthenian-Lithuanian territories which were annexed to the Empire. In the previous period it was Poland that was the subject of the integration, but since the beginning of XVIII century it was Russia which was the driving force behind the integration. In 1918 and in the first place the war in 1920 this tendency was broken. However, as a result of the WWII, the Polish state became subjected to Russia again, but this time in different constitutional reality. Next break of bonds followed just after 1989. The Russian domination and represented by it the authoritarian traditions made the Poles come to growing realization that the only alternative is to integrate with the states of the Western Europe. Present determination on the part of the Polish elite and the Polish society to join the European Union can be perceived as result of the previous experiences. With

the Germans not presenting any threat and the positive recollections of the past relationships with the Austrian state, these are factors which play additional favorable role in turning in the western direction. However, it cannot be excluded that the growing uncertainty towards the western neighbours and the European Union can prompt Poland to enter the path of the integration with the East. This time with a considerably stronger role of Poland, as a subject and initiator of the integration.

Fig. 1. Polish territories in the period of 1815-1831



Literature

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Streszczenie**INTEGRACJA ZIEM POLSKICH Z PAŃSTWAMI
SĄSIEDZKIMI W XIX WIEKU**

Z dniem 1 maja 2004 roku Rzeczpospolita ma stać się członkiem Unii Europejskiej. W chwili obecnej nie wiemy jeszcze, jaki ostateczny kształt ustrojowy przyjmie ta organizacja. Może ona pozostać obszarem współpracy gospodarczej, może jednak stać się związkiem o charakterze politycznym. Ten ostatni kierunek rozwoju Unii Europejskich postulowany jest przez liczne grupy interesów. Powołanie federacji państw europejskich oznaczałoby powstanie olbrzymiego państwa. Jedną z jego części składowych była by Polska. Nie byłby to jednak pierwszy tego typu przypadek w naszej historii. Od XIV do końca XX wieku przeważał jednak wschodni kierunek integracji.

Jednym z największych pod względem obszaru państw w dziejach Europy była Rzeczpospolita Obojga Narodów. Powstała w roku 1569 jako rezultat zawarcia Unii Lubelskiej. Oprócz podstawowych członów - Królestwa Polskiego i Wielkiego Księstwa Litewskiego, w jego skład weszły mniejsze i mniej znaczne organizmy państwowe: Księstwo Pruskie i Księstwo Kurlandzkie, oba na prawach lenna, oraz Księstwo Siewierskie, własność biskupów krakowskich. Rozdrobnienie polityczne będące pochodną feudalnego ustroju państwa, doprowadziło ostatecznie do upadku Rzeczpospolitej. Polska z roli podmiotu integracji politycznej tej części Europy, stawała się jej przedmiotem. Dominującą pozycję w tej części Europy zajęła Rosja.

W okresie 1815-1918, podobnie jak w okresie istnienia Rzeczpospolitej dominował wschodni kierunek działań integracyjnych. Królestwo Polskie, kontynuujące w zmienionych warunkach tradycje polskiej państwowości, związane zostało unią państwową z Cesarstwem Rosyjskim. W jeszcze większym stopniu dotyczyło to ziem litewsko-ruskich, które zostały włączone bezpośrednio w skład Cesarstwa.

Jedynie pogranicze obszary dawnej Rzeczpospolitej (południowa Małopolska, Poznańskie i Pomorze) związane zostały z innymi organizmami państwowymi (Austria, Prusy). Rok 1918, a przede wszystkim wojna roku 1920 przerwała te tendencję. Nie na długo jednak, gdyż w wyniku II wojny światowej państwo polskie ponownie zostało podporządkowane Rosji, tym razem w innych realiach ustrojowych. Kolejne zerwanie więzów nastąpiło dopiero po roku 1989. Dominacja Rosji i reprezentowanych przez nią tradycji autorytarnych, umacniała w Polakach przekonanie, że jedyną alternatywą jest integracja polityczna z państwami Europy Zachodniej. Obecna determinacja polskich elit i polskiego społeczeństwa w działaniach na rzecz przystąpienia do Unii Europejskiej może być więc postrzegana, jako rezultat poprzednich doświadczeń.

TRANSFORMATION OF THE ROLE OF ECONOMIC ENVIRONMENT IN POLAND

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Introduction

Economic environment can be defined as a space where people live and do business. Since a person's actions in this environment have a dynamic character, the space used can be enlarged, at least to some extent, or transformed structurally. However, it can also be subject to degradation and erosion.

This kind of environment has been growing in significance within modern economy. Colleges and universities acknowledge this by adding classes on environmental economy to their curriculum. In addition, national governments include, to some extent, the principles of environmental economy in their actions.

The changes in the status of the environment also affect business. What is more, even the environment itself reacts to and affects economic activities and the principles governing them in always-changing, and sometimes unforeseen, ways, e.g. globalization and computerization.

The goal of this paper is to show the directions of the changes in the environment for an average business during political transformation in Poland. Attempts are also made to answer questions on the factors influencing such changes as well as to outline trends that may soon affect the relationship between the environment and economy.

Theoretical Relationships Between a Business and its Economic Environment

Generally speaking, a business operating in an economic environment is responsible for the selection of its location. The kind of business, its size and technological level determine a specific role for such location factors as:

- raw materials
- electrical power access

- sales market
- transportation
- human resources
- water access
- agglomeration etc.

These factors may have to be modified by location conditions, for example, the protection of natural environment, economic policy, scientific and technological advancement etc.

The right choice of a place in the environment may be one of the conditions for success. However, the decision-making process of selecting a location is quite risky as an economic situation and its advantages are subject to change with time, and may hinder or even prevent business operations.

Environmental aspects cannot be disregarded by a developing business which:

- plans and implements its growth,
- has access to a developing technological infrastructure,
- enters competing sales markets,
- cooperates with other businesses,
- affects natural environment in surrounding areas, risking the spread of pollution,
- generates migrations in human resources (either changeable or constant),
- causes changes in the environment or their diffusion etc.

People operating, not only in a business fashion, in their environment, have significant influence on that environment. The way they behave depends to a great extent on their own perception of and reaction to the environment. This can result in willingness to respect, or to force, a proper organization or arrangement of the environment.

Here are some typical environmental economy behaviors:

- choice of a place of employment, services, leisure, shopping,
- commuting to work and definitive migrations,
- single family housing,
- agriculture and rural housing,
- choice of transportation,
- conducting non-agricultural business.

Social aspects can also have their environmental dimension as for example, choice a school or doctor.

The Role of Economic Environment in the Former Political System

History still holds great influence on contemporary developmental trends in Polish environment. Territorial partitions of Poland were a very important

cause of destruction as they cut into segments some transportation routes and connections. They also laid the foundation for the initial mechanisms of contemporary developmental polarization. Attempts at institutionalized state interventionism during the time of the Second Polish Republic were unsuccessful in reducing these unfavorable trends. Years of social realism proved to be ineffective and additionally destructive. The great mark they left on social mentality within existing economic structures can still be seen today.

It is worthwhile to pay special attention to three special characteristics of the centralized system:

1. The central system of accumulation and allocation of financial resources, which substituted a free-market system with its price differentiation, meant that resources from the central budget were directed to where it was deemed necessary by central government institutions. (That resulted in frequent mistakes in placement decision-making.)
2. A specific structure of branches and sectors preferred the industrial sector, and specifically heavy industry. This determined the decisions made in regional planning, especially the location of industry. Skim resources and the need of the industry for accompanying investment influenced the decisions on placing industry in the areas that have been already better developed
3. Wrong system of prices. Prices did not fulfill their informative function among other things. Product and factory subsidizing obscured real costs and the supply –and-demand relationships. As a result of this, decisions on the location of industrial sites were arbitrary and personally motivated.

There were two characteristics of the pricing system that had significant influence on the utilization of environment:

- Low energy and fuel prices as well as low transportation ticket prices
- Lack of realistic prices of land and natural resources

The priority of political decisions coupled with the suspension of free market principles caused a lot of pathological phenomena and dysfunction in the environment. Reduction in the sensitivity to the environment as well as the costs of its disturbances led to important changes in the environment, namely, areas presenting ecological threat were created. Excessive burden on the transportation infrastructure caused centralized distribution and mass commuting to work. Wasteful land management and wrong localization were among additional results.

The wrong understanding of the requirements to concentrate capital resulted in a unique giant-size industrial solutions. Politically motivated quest for hypothetical, not realistic, advantages of capital concentration was reflected in overinvestment in certain areas (Silesia) and disturbing the ecological balance.

On the other hand, the areas of “Poland B” were further marginalized by unsuccessful activation. Also, across-the-border “friendship” that was uniquely understood, strengthened digressive processes in the regions close to natio-

nal borders. Environmental behaviors of people, directed or rationed, were mostly limited to changeable or permanent migrations that were at times very numerous. At the same time, systematic solutions led to passive behaviors or destruction in the relationship between people and the environment.

The quest for hard currency contributed to destructive practices in natural resources management. No attention was paid to social costs of such actions. Uniformity of solutions, excessive development in some regions or building chaos played a negative role in the implementation and preservation of order in the environment.

New Meaning of The Environment During the Period of Political Transformation

Political transformation in Poland has proved to be a laborious period of system reforms leading to introducing free market mechanisms, privatization, decentralization of decision-making and the revival of local self-government.

These processes have an obvious impact on the environment. However, they also aim at the change of the role and image of the contemporary economic environment for business and the society.

Political transformation together with environmental policy should be directed first and foremost at the utilization of specific advantages of Polish environment, including location, that:

- enables transportation of innovations, goods and people in all directions important for the integration with the European socio-economic environment.
- creates favorable conditions for the localization of business that combines the western and world capital and technology with qualified workforce and successful solutions of the absorbent Eastern and Central European markets.
- creates potentially favorable conditions for the entrance of Polish economy into the competitive, effective and innovative European environment as well as transfers achievements obtained in this way east of Poland.
- enables the incorporation of ecological values of Polish natural environment known around the world into European values in such a way that protects and utilizes its biological diversity.
- opens natural resources of the Polish recreational space to the growing demand from Western Europe for ecotourism and recreation close to nature.
- stimulates a greater environmental mobility of Poles and other nationals of Eastern Europe, their cultural integration with the highly developed post-industrial civilization of the western world.
- causes the spread of democracy and effective development in the direct international surrounding.

- enables not only an economic and cultural transfer from western Europe eastward, but also gives an opportunity for active influence on the content and direction of such expansion.

The connecting place of Poland in the European environment combines Polish national interests with the European Baltic Region, Germany, Western Europe, the Visegrad Group as well as with Russia, Ukraine, Belarus and the countries of South Eastern Europe. It also becomes an important link in the European environment with its variety of common interests, but also situations leading to a potential or real conflict.

It is also important to recover the values of the Polish economic environment that were “lost” in the previous political system such as:

- rational decision-making process regarding localization;
- economically oriented human behavior in the environment;
- competitiveness of the environment;
- spread of innovations;
- environmental order;
- political decentralization;
- openness;
- cooperative attitudes;
- ecological purity etc.

On the other hand, integration trends in Europe form the basis for creating such aspects of the environment as its integration and coherence.

The result of the popularization of free market mechanisms is the increasingly intense process of the polarization in the Polish environment, and in the economic development in particular, leading to increasing differences in

- incomes and living conditions,
- unemployment,
- access to sales market and technology,
- border-related and across-the-border cooperation etc.

It turns out that such developments are caused by:

- local economic activity,
- business creation,
- education,
- social mobilization,
- economic climate,
- competitiveness,

by their very nature, these factors are not distributed evenly in the environment and that emphasizes the differentiation.

As a consequence of this and as a result of an ineffective regional policy, what can be observed is the growing marginalization of eastern and south eastern parts of Poland. In addition to that, the over-concentration of urban-

industrial agglomerations creates a potential threat of disintegration of the Polish environment, the so-called "disintegration gap." Similar threats appear in the entire country facing European integration. They can be described as a lack of compatibility between the potential and opportunities in the two structures to be integrated, for example:

- pushing Poland to the periphery of the dynamically developing western Europe.
- generating historically motivated opportunities for conflict, fear and antipathy related to overcoming of the Polish economic environment,
- gradual loss of cultural and national identity and the unification of environmental structures.

The integration scenario can produce a disadvantage for Poland if it becomes the periphery between the dynamically developing European Union and Russia.

In the evolving political and integration situation, the functioning of businesses has to become objectively and economically oriented. It also becomes more complicated due, in particular, to the great variety of new regulatory mechanisms, the proliferation of decision-making bodies, further formalization of environmental behaviors, for example, in the planning stage, as well as an easy flow of human resources, capital and information etc.

New Relationships Between Business and Environment

The processes that are already under way have significant influence on the future concept of the economic environment, for example:

- economic globalization, with the impact of global business, and the liberalization of economic relations facilitate access to the environment and force competitiveness, but they also introduce the polarization of the strong and the weak
- technological changes with the new place of business in cyberspace or the scientific revolution within networks.
- changes in business organization—network within a network;
- new trends in localization—businesses as containers for localization concentration potential etc.
- growing inability to foresee events in the environment such as terrorism, diseases, ecological disasters.

It becomes easier and easier to identify the limitations of the environment which, in turn, will force us to treat it a rare commodity. The future will witness the need for a unique protection of the environment and a broader utilization of virtual environment or attempts at claiming the space of others.

Current trends in world economy, such as globalization and liberalization of international trade, facilitate access to the environment. Moreover, they cause more and more fierce entrepreneurial competitiveness, including that of a non-economic nature. They also bring about further polarization in the utilization of the environment with the role of global cities and metropolitan areas operating above the surrounding areas etc.

Great technological improvements can produce new means of economic expansion, e.g. via the Internet, the use of new types of infrastructural networks (light conductors etc.), networks without networks, new use of existing networks, virtual solutions, elimination of the need to move physically in the environment while conducting business etc.

It is easy to foresee further organizational changes in businesses that create a network within a network.

The phenomena taking place may point to new localization trends related to the utilization of, for example, the concentration potential, the dependence on traditional localization factors, conservation of the environment (miniaturization and virtual space) etc. It becomes increasingly common to talk about reverse trends where it is not the regions that attract business but where business selects a region.

Summary

In order to summarize the ideas contained in this paper, it is necessary to notice changes in the relationship between business and the environment, happening also in Poland. These changes result from both the evolution of the trends that affect business but also of the image and processes of the economic environment itself. It becomes more and more subject to globalization, informatization and miniaturization etc. Additionally, it becomes more difficult to fight new threats appearing in the environment.

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Streszczenie

TRANSFORMACJA ROLI ŚRODOWISKA GOSPODARCZEGO W POLSCE

Obserwując tendencje zachodzące we współczesnej gospodarce nie sposób nie wskazać na przeobrażenia roli przestrzeni ekonomicznej, które rzutują na zmianę relacji między człowiekiem, firmą a przestrzenią (również w Polsce). Zmiana ta wynika zarówno z ewolucji tendencji oddziałujących na firmy, jak i z przeobrażeń wizerunku i zachowań samej przestrzeni ekonomicznej podlegającej globalizacji, informatyzacji, miniaturyzacji itp.

SOCIAL THREATS TO THE DEVELOPMENT OF POLAND IN THE CONTEXT OF INTEGRATION WITH THE EUROPEAN UNION

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Introduction

Poland is the largest of the countries entering the European Union in terms of its area, population and economy. However, comparing the level of economic development on the basis of the GDP per capita, Poland must reduce the economic gap relative to the EU member states and to the majority of countries that will join the Union in 2004. Otherwise Poland faces the threat of becoming a peripheral area of the EU not only because of its geographical location but primarily due to the backwardness of its economic development.

While economic literature tends to emphasise material and economic factors of economic development, increasingly, social aspects of this development are pointed out. This article attempts to present social factors of economic development and social threats that have a detrimental effect on Poland's development to answer the following question: What is the possible effect of social threats to the development of Poland on the country's economic position in the European Union in future?

Social Factors of Economic Development

One of the endogenous factors conditioning the development of the country is, besides its assets, the condition of its human resources. Human resources of a country are most frequently referred to as the human capital defined as the sum total of knowledge, skills, health, and vitality in the society¹. A certain part of the human capital is only natural and cannot have any effect on

¹ J. Zaucha: *Spoleczne podstawy polityki rozwoju regionalnego*. [in:] *Strategiczne wyzwania dla polityki rozwoju regionalnego Polski*. (Friedrich Ebert Stiftung, Office in Poland" Warsaw 1999), p. 53.

its size, e.g. the IQ of a given person, resistance or vulnerability to diseases, temperament, etc. However, the remaining part of human resources can be stocked up by education, culture, health service, promotion of healthy lifestyles, social security, etc. Human resources play a double role in the development of the country. On the one hand, they constitute production resources. The bigger the accumulation of positive qualities, or, in other words, the bigger the human capital, the better effects in production. On the other hand, human resources should be treated as the subject of a development policy, since it is citizens acting as the electorate, lobbyists, members of political parties and NGOs formulate aims of development and determine methods of their accomplishment. It follows that the relation between the quality of human resources and quality and effectiveness of an economic and social development policy is evident.

Among phenomena that have a considerable effect on the development of the country cultural conditioning and social awareness are frequently mentioned. This includes the awareness of the regional identity, system of values (including work ethos), customs and traditions, as well as mentality of people. These features should fall under the human capital category because honesty, responsibility, discipline at work, commitment, etc. influence the quality of human resources available in the country. Given their specific character, they require a separate analysis.

It is generally assumed that regional identity can stimulate the design of the regional development policy by the local community. The involvement of regional communities in Poland in the process of establishing a civic society testifies to the existence of regional diversities that are deeply rooted in the local cultures. If one attempted to measure this commitment by the type, number and activity of non-governmental organisations, one could point out that it is easier to organise the community that can manifest its identity with a given region².

A system of values can also influence social participation in development policies and in implementing the target model of state development. While this participation largely depends on the approval or negation of regionalism, the selection of a development model is invariably linked to the priority given to freedom or equality. It needs to be stressed that a strong egalitarian tendency may have a negative effect on development processes both on a regional and national scales.

Security, including personal safety, protection of ownership, and social security, is also an important factor strictly connected with the social sphere. David Landes aptly contends that "... growth is only natural and occurs wherever opportunities so allow and where conditions of life are *secure*"³ and

² *Ibid.*, p. 57.

³ D.S. Landes: *Bogactwo i nędza narodów. Dlaczego jedni są tak bogaci, a inni tak ubodzy.* (Warszawskie Wydawnictwo Literackie MUZA S.A.: Warsaw, 2000), p. 51.

“...where ownership is jeopardised, the spirit of entrepreneurship wanes and development is hindered.”⁴ Negative social phenomena may, in fact, seriously endanger this security, as will be discussed later on.

Social Threats to Polish Economic Development

Education ranks first among factors that shape the size of the human capital. Although theoretically speaking the Polish system of education is free of charge on all levels, in practice, access to education is substantially restricted. The biggest barrier to large scale education is poverty, most noticeable in villages and small towns.⁵ Such a state of affairs is attributed not only to limited funding available in poor families on children's education but also to rather restricted educational aspirations of their parents and children from poor families alike.⁶ According to studies conducted by OECD Poland belongs to the countries of large educational inequalities. Children of well-to-do and/or well educated parents have the biggest chance to reach the highest levels of the educational ladder. Children from lower social strata rarely succeed in school, and they tend to opt for lower level schooling compared to their more privileged peers. Even when they reach the same educational level, children of well-to-do parents complete better and reputable schools and, consequently, have better work opportunities on the job market.⁷ Such observations are rather disturbing: in 2001, 24% of children under 14 and approximately 22% of the young aged 15-19 were classified as relatively impoverished families while children and young people under 19 constituted over 40% of the population living in extreme squalor⁸.

Another factor that has a negative effect on the size of the human capital is the health condition of the society and a limited access to health care facilities. According to the report of the World Health Organisation published in 2002, poverty is one of the most serious factor responsible for health hazards in the world. While this statement mainly refers to Third World countries, the report demonstrates a relation between the scope of poverty and the health condition also in Central and Eastern Europe (EUR-B) where Poland is located⁹. The interdependence between the health condition of a given country and the material situation of its citizens is also noticeable in countries that enjoy a higher

⁴ *Ibid.*, p. 52.

⁵ E. Putkiewicz, M. Zahorska: *Spoleczne nierownosci edukacyjne – studium szesciu gmin.* (Instytut Spraw Publicznych: Warsaw, 2001), p. 7.

⁶ *Raport o Rozwoju Spolecznym, Polska 1998.* (UNDP: Warsaw, 1999), pp. 48-55.

⁷ E. Putkiewicz, M. Zahorska: *op. cit.*, p. 5-6.

⁸ *Warunki zycia...*, *op. cit.*, p. 105.

⁹ *The World Health Report 2002. Reducing Risks, Promoting Healthy Life.* World Health Organization 2002, pp.50-52.

level of social development relative to Poland. Studies conducted in the USA indicate that inequalities in the standard of life significantly effect the health condition of impoverished communities and are responsible for an increased death rate among the poor.¹⁰ In Poland access to public health care facilities seems to be borne out by statistics. A comprehensive study into living conditions conducted by the Main Statistical office in 2001 revealed that 98.2% of the Polish population were entitled to free medical service. However, it must be pointed out that the study conducted did not include people living in multi-family households and special places of residence (including student dormitories and social care homes), the homeless and pathological families. Therefore, the results quoted are subject to statistical error. The same study confirmed that many people, particularly hard-up families, have serious problems in using the services provided by the national health care system. Among these households, 72% gave up on buying drugs prescribed or recommended by doctors 59.3% withdrew from visiting a dental surgery and 48.2% had to refrain from visiting a doctor¹¹.

Marginalisation is another serious threat to social and economic development of the country. This phenomenon is broadly understood as limiting access to social institutions leading to the alienation of those affected by the phenomenon. Poor people living on the margin of the society do not demonstrate any interest in participating in political and social life; they do not have any sense of belonging to a given region or a community.¹² Such people adopt an approach to life that is not geared towards improving their situation in future but rather towards surviving another day, week or month at best. Such a survival based stance is usually restricted to lending or applying for donations.¹³ Lack of the entrepreneurial spirit, drive and commitment does not have any bearing on the development of the country as long as the problem is marginal. The problem is that in Poland a considerable number of people have been affected by this, and one can actually talk about the rise of a poverty culture, i.e. a style of life, beliefs and values characteristic to poor people.¹⁴ This culture remains in blatant contradiction to the system of values that foster development processes.

¹⁰ K. Lochner, E. Pamuk, D. Makuc, B.P. Kennedy, I. Kawachi: *State-Level Income Inequality and Individual Mortality Risk: A Prospective, Multilevel Study*. American Journal of Public Health March 2001, Vol. 91 Issue 3, pp. 385-392.

¹¹ *Warunki życia...* op. cit., pp. 189-191.

¹² J. Grotowska-Leder: *Długość trwania w biedzie a procesy marginalizacji – Badania łódzkie*. Polityka Społeczna 1999, Nos. 11-12, p. 10.

¹³ H. Palska: *Zależność od innych. Formy aktywności ekonomicznej ludzi ubogich*. Polityka Społeczna 1999, Nos. 11-12, pp. 6-9.

¹⁴ R. Kraczką: *Badania nad ubóstwem. Przegląd głównych nurtów i teorii*. [in:] *W kręgu ubóstwa. Próba analizy psychospołecznych aspektów zjawiska*. Ed. Kazimiera Wódcz, Katowice 1993, pp. 14-15.

“An underclass is a group that combines appalling living conditions and lack of traditional ties (...) resulting in a cynical approach to officially proclaimed social values with respect to work and social order. An underclass is not a revolutionary power. It reveals its presence through criminal activity, hooliganism and the establishment of fighting units on the extremes of a political spectrum.”¹⁵

Poverty culture poses a positive threat to security, which is the most important prerequisite to development. There is a direct link between impoverished communities and social pathologies, including grave criminal offences¹⁶. Increased impoverishment of the Polish society is invariably connected with the increased crime rate, duly confirmed by police statistics. In 2001 the areas of high unemployment rate reported a nearly 230% increase in the number of thefts relative to 1995¹⁷. Among criminal offences that are on the rise the following are the most common: mugging, robbery, extortion, physical injuries, theft and burglary. The ever increasing crime rate and the weakness of the enforcement institutions significantly reduce security in the society. In 1999, 64% respondents of the Public Opinion Research Centre (CBOS) considered Poland a dangerous country to live in, and 57% were afraid of falling victim to a criminal offence¹⁸.

Endangered security and stability of the social, economic and political system is brought by the growing wave of dissatisfaction and discontent expressed by poor and marginalised people or those who fear marginalisation. So far such demonstrations have been relatively peaceful with a few isolated cases of fights or destruction of the property. Sociologists are now wondering how far the critical point is that will turn such discontent into road blockades, sit-ins of public buildings and an open revolt combined with looting and fights with the police forces. With the growing pauperisation of the society, the border seems very close, especially in the regions where such negative phenomena are now commonplace.¹⁹

Apparently, at the core of the threats to the social and economic development of the country is the ever growing pauperisation of the society, which is now considered one of the most pressing problems. An analysis of social threats

¹⁵ W. Warzywoda-Kruszyńska, J. Grotowska-Leder: *Wielkomijska bieda w okresie transformacji*. Instytut Socjologii Uniwersytetu Łódzkiego, Łódź 1996, p. 39.

¹⁶ M. Hirszowicz, E. Neyman: *Zbędni, biedni, niebezpieczni*. Kultura i Społeczeństwo 2000, No. 1, pp. 145-164.

¹⁷ A. Filar, S. Jarecki: *Polskie Wawele. Groźą nam bunty odrzuconych*. Wprost 2001, No. 958.

¹⁸ G. Węgrzyn: *Patologia społeczna a zjawiska marginalizacji*. Polityka Społeczna 1999, Nos. 11-12, pp. 28-29.

¹⁹ A. Filar, S. Jarecki: *Polskie Wawele. Groźą nam bunty odrzuconych*. Wprost 2001, No. 958.

requires an in-depth study of the phenomenon, its scope and dynamics to enable a comparison with a similar phenomenon reported in the European Union.

Pauperisation in Poland and in the European Union

According to the estimates provided by the Main Statistical Office prepared on the basis of studies into household budgets, in 2001 over 57% of Poles lived in households in which the level of spending was lower than the established social minimum. Although the level of expenses defined as the minimum social level is not considered as a poverty line but merely as the border of the poverty zone, it needs to be stressed that living conditions of those who fall under this category are not sufficient to ensure an adequate development in the society²⁰. In 2001, 15% of households were reported to have fallen below the statutory poverty line²¹ - a considerable increase from 13.6% reported in 2000. the scope of extreme impoverishment, determined by means of the minimal level of subsistence is equally threatening – approximately 9.5 %²². Table 1 presents changes in the scope of poverty during the period of social, economic, and political transformations.

Table 1. Scope of poverty in Poland in the years 1989-2001

Poverty line	1989	1990	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001
	Percentage of persons below poverty line												
Relative	-	-	-	-	12.0	13.5	12.8	14.0	15.3	15.8	16.5	17.7	17.0
Minimal subsistence	-	-	-	-	-	6.4	-	4.3	5.4	5.6	6.9	8.1	9.5
"statutory"	-	-	-	-	-	-	-	-	13.3	12.1	14.4	13.6	15.0
Subjective	29.0 ^{a)}	-	41.0 ^{a)}	-	-	41.0 ^{a)}	37.0 ^{a)}	-	-	-	-	-	-
	-	-	-	-	40.0 ^{b)}	33.0 ^{b)}	30.8 ^{b)}	30.5 ^{b)}	30.8 ^{b)}	30.8 ^{b)}	34.8 ^{b)}	34.4 ^{b)}	32.4 ^{b)}
Minimal wage	14.8	31.2	32.6	32.4	34.8	43.2	-	46.7	50.4	49.8	52.2	53.8	57.2

Where: a) percentage of population b) percentage of households

Sources: *Warunki życia ludności w 2000 i 2001 roku*, GUS 2001, 2002; Golinowska S.: *Polityka społeczna państwa i jej oddziaływanie na wyrównanie różnic społecznych*. [in:] *Raport o rozwoju społecznym. Zmieniająca się rola państwa. Polska '97*, (UNDP: Warsaw, 1997); *Sfera ubóstwa w Polsce w świetle badań gospodarstw domowych w 1996 i 1997r.*, GUS 1997 i 1998.

It is clear that poverty in Poland has been on the rise since the beginning of system transformations. This tendency is noticeable irrespective of poverty

²⁰ L. Deniszczyk, B. Sajkiewicz: *Kategoria minimum socjalnego*. [in:] *Polska bieda II. Kryteria. Ocena. Przeciwdziałanie*. ed. S. Golinowska. (IpiSS: Warsaw, 1997), pp. 150 - 198.

²¹ The minimal wage required to apply for statutory financial support.

²² L. Deniszczyk, B. Sajkiewicz: *Kategoria minimum egzystencji*. [in:] *Polska bieda...*, pp. 31 - 64.

measures applied. The only exception falls in the years 1995-1996, when relative and extreme poverty designated by the minimal subsistence level decreased. The ever growing pauperisation of the society is usually explained by references to unfavourable social phenomena that accompany system transformations in Poland. These include unemployment, decrease of real income for selected social groups, polarity of income, and restrictions in financing society oriented programs by the state. At the core of these phenomena lie social and economic programs adopted and executed by subsequent governments as well as internal and external conditions of the country's economic growth²³.

In the European Union poverty is subject to an analysis that incorporates a relative approach to the issue. Relative poverty rate for the whole European Community reached the level of 15%, in 1999. Greece and Portugal ranked first with 21%, Spain and the UK -19%, and Ireland and Italy -18%. Table 2 presents a detailed list of indicators of poverty in the European Union.

Table 2. Scope of relative poverty in the European Union (in 1999) and in Poland (2001)

Country	Poverty rate calculated by means of:	
	60% median of equivalent income	50% median of equivalent spend
The EU- 15 states	15%	9%
Belgium	13%	7%
Denmark	11%	6%
Germany	11%	6%
Greece	21%	14%
Spain	19%	13%
France	15%	8%
Ireland	18%	11%
Italy	18%	12%
Luxembourg	13%	6%
Holland	11%	6%
Austria	12%	6%
Portugal	21%	13%
Finland	11%	5%
Sweden	9%	5%
UK	19%	11%
POLAND	-	17%*

* In the case of Poland, a relative poverty line is determined using 50% median of monthly equivalent spend; data for 2001.

Sources: I. Dennis, A.C. Guio: *Poverty and social exclusion in the EU after Leaken - part I. Eurostat Statistics in Focus Theme 3-8/2003*, p. 6, and *Warunki życia ludności w 2001 r.* GUS 2002, p. 200.

²³ See: U. Wich: *Spoleczne konsekwencje procesu transformacji w ukladzie regionalnym*. Prace Naukowe Akademii Ekonomicznej we Wrocławiu 1999, Mo. 807; W. Jakó-bik: *Transformacja systemowa w Polsce - ujęcie retrospektywne*. Gospodarka Narodo-wa 1997, Nos. 4-5, and S. Golinowska: *O przyczynach bezrobocia i polityce jego zwalczania*. Polityka Społeczna 2001, No. 3.

Analysing the data provided in Table 2, one may have an impression that the level of relative poverty in Poland is not significantly different from the average scope of the phenomenon in the European Union. In fact, in some European countries, this level is significantly higher. This apparent similarity, however, results primarily from the application of different calculation methods. In the European Union poverty line is calculated on the basis of a 60% median of equivalent income while in Poland it is a 50% median of equivalent spend. Applying the latter method to calculating the level of poverty in the European Union the average poverty rate falls down to 9%, and in the countries where poverty is the most acute does not exceed 14%, i.e. considerably lower than in Poland. Another problem of this comparison lies in the differences in the level of life of people classified as poor in Poland and in the European Union. These differences are attributed to the values used in describing the poverty line, as presented in Table 3 below.

Table 3. Value of the relative poverty line in Poland (2001) and in the European Union (1999) according to the Purchasing Power Parity

Country	Value of the relative poverty line per year	
	Single person household	Two adults + two children household
The EU- 15 states	7 263 EUR	15 262 EUR
Belgium	8 659 EUR	18 184 EUR
Denmark	9 414 EUR	19 769 EUR
Germany	8 236 EUR	17 296 EUR
Greece	4 753 EUR	9 981 EUR
Spain	5 347 EUR	11 229 EUR
France	7 944 EUR	16 682 EUR
Ireland	6 721 EUR	14 114 EUR
Italy	6 305 EUR	13 241 EUR
Luxembourg	12 532 EUR	26 317 EUR
Holland	8 067 EUR	16 941 EUR
Austria	8 158 EUR	17 132 EUR
Portugal	4 400 EUR	9 240 EUR
Finland	6 921 EUR	14 534 EUR
Sweden	6 942 EUR	14 578 EUR
UK	7 694 EUR	16 157 EUR
POLAND	2 186 EUR*	5 902 EUR*

* In the case of Poland, a relative poverty line is determined using 50% median of monthly equivalent spend; data for 2001.

Sources: I. Dennis, A.C. Guio: *Poverty and social exclusion in the EU after Leaken – part 1*. Eurostat Statistics in Focus Theme 3-8/2003, p. 6; *Purchasing Power Parities and related economic indicators for EU, Acceding and Candidate Countries and EFTA*. Eurostat Statistics in Focus Theme 2-56/2002, and *Warunki życia ludności w 2001 r.* GUS 2002, p. 201.

The above presented data indicate clearly that the poverty line used in Poland is significantly smaller lower than poverty lines used in the poorest members states of the European Union. It follows that persons considered poor in the EU would not be classified as such in Poland, and in a few cases would even be considered persons of average means. Consequently the degree of deprivation of poor people in Poland is far greater than that in the European Union, and if one resorted to the measurements applied in the European Union to calculate the scope of poverty in Poland, it would be even greater than it actually is. In conclusion, the consequences of poverty in Poland are far deeper and far more acute than in the European Union. Given the fact that the rising tendency continues, Poland is bound to face serious problems in catching up with the social and economic level of the EU.

Summary

Increasingly, social factors, generally referred to as the human capital, play an important role in development processes. The development of the human capital depends on accessibility of education and activity of the people in this sphere, availability of health care service, promotion of healthy life styles, security and justice as well as social protection. One of the biggest barriers in social and economic development of Poland is poverty and its serious consequences for the society. These include inequality in the access to educational facilities, restrictions in public health service, growing crime rate and other threats to security. All these phenomena have a detrimental effect on the size and quality of the human capital, and, by extension, on the level of economic development. After joining the European Union, Poland will have a great deal of work to catch up with the European communities as well as with the countries that will become members of the Union along with Poland in terms of economic and social development. For this reason and in the context of integration processes, putting a stop to the growing pauperisation of the society should constitute an important element of the economic and social policy of the state.

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Streszczenie

ZAGROŻENIA SPOŁECZNE DLA ROZWOJU POLSKI W KONTEKSCIE INTEGRACJI Z UNIĄ EUROPEJSKĄ

Polska przystępuje do Unii Europejskiej jako kraj o niższym poziomie rozwoju społeczno-ekonomicznego nie tylko w stosunku do krajów tworzących Unię, ale także od większości krajów, które wspólnie z Polską przystąpią do wspólnot. Istotnym zadaniem dla Polski będzie więc wyrównanie poziomu rozwoju kraju względem innych członków Unii Europejskiej. Zadanie to powinno być realizowane przez wzmocnienie pod względem ilościowym i jakościowym oraz wykorzystanie zarówno ekonomicznych, jak i społecznych czynników rozwoju gospodarczego. Tymczasem w sferze społecznej Polski można zaobserwować występowanie zjawisk, które negatywnie oddziałują na rozmiary kapitału ludzkiego oraz warunki gospodarowania. Wśród tych zjawisk należy wymienić przede wszystkim: ograniczony dostęp do edukacji, trudności w dostępie do opieki zdrowotnej, ograniczanie aktywności ekonomicznej obywateli, rozwój patologii społecznych, a przede wszystkim wzrost przestępczości i innych zagrożeń bezpieczeństwa. Za główne źródło przedstawionych zagrożeń uznaje się ubóstwo, które w Polsce rośnie nieprzerwanie od początku procesu przemian społeczno-ekonomicznych, przyjmując największe rozmiary w 2001 r. Porównanie wskaźników ubóstwa relatywnego w Polsce i w Unii Europejskiej nie wskazuje na znacząco większe rozmiary tego zjawiska w naszym kraju. Wynika to z odmienności zastosowanych metod obliczeniowych oraz ze zdecydowanie niższego w Polsce poziomu życia społeczeństwa. Po uwzględnieniu tych różnic należy stwierdzić, że ubóstwo w Polsce jest problemem rozleglejszym i poważniejszym niż w Unii Europejskiej, a jego konsekwencje w większym stopniu ograniczają procesy rozwojowe. Dlatego zmniejszenie rozmiarów biedy powinno stać się elementem działań służących wyrównaniu poziomów rozwoju społeczno-ekonomicznego Polski i Unii Europejskiej.

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POLISH SPECIAL ECONOMIC ZONES IN CONTEXT OF INTEGRATION WITH EUROPEAN UNION

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In the middle of 90s special economic zones (SEZ) started to appear for the purpose of attracting direct foreign investments and stimulating economic growth of those regions which were affected with high unemployment rate and simultaneously with the low usage of industrial infrastructure. Nevertheless the creation of special economic zones and granting a great many privileges to operating companies in those zones, (i.e. 10 year tax vacations, and 50% of tax relief in the next 10 years) was inconsistent with:

1. Equality principle towards law of all economic bodies,
2. and with some provisions of the treaty on association of Poland to the European Union.

Therefore Polish economic zones have been from the very beginning of their existence a subject of many disputes and debates.

The solutions applied in other economic zones, especially in the existing as of 1958 economic zone in Sharon in Ireland were taken as a model for the Polish economic zones and all other projects related with their functioning. The legal act on special economic zones was passed by the Polish Parliament in October 1994¹. In the Polish political and economic reality completely new privileged zones came into existence in the based on this legal act. Economic activity could be run within such a zone based on defined rules. Usually these rules are more expedient and favorable than in any other part of the country. In the authors' intention of this legal act the zones were to guarantee the optimal conditions for the local development.

In reality this meant a creation of better than in any other part of the territory of Poland conditions for:

1. Management of existing industrial propriety and economic infrastructure;
2. Development of specified branches of economic activity;
3. Creation of new jobs and management of natural resources preserving the ecological equality principle;

¹ Legal Act Register, 1994, No. 123, Item 600 with later amendments.

4. Increase of competitiveness in production of goods and services;
5. Development of new technical and technological solutions;
6. Development of export².

The main idea of creation such zones in Poland was the need of creating new jobs and exploitation of existing and unexploited technical infrastructure in the most effective way³.

Residential and foreign investors who plan to start economic activity on the territory of SEZ foremost pay attention at three factors:

1. The scope of allowances and tax privileges granted in SEZ;
2. Localization;
3. Clear, simple and unchangeable in a short time legal regulations.

First and foremost the investors expect from the state clear and concrete principles of governmental policy concerning investments, defining of clear rights and obligations for investors (contract form preferred), minimum of contact with governmental agencies and the most effective principles regulating the system of exporting the goods out of the zone as well as importing them into.

However, governments of most countries abandon granting of various privileges and stimulus of fiscal kind in the SEZ in favor for possibly complex preparedness of economic businesses-like infrastructure and services for investors and enabling an access to development of enterprises in zones. This kind of approach requires an involvement of a great many public resources which Poland lacks and which in the conditions of increasing budget deficit will be impossible to assign in the next few years. Integration with the European Union and which follows the possibility of expenditure of grants from the European Union financial add assistance could change the situation radically.

The privileges which investors have received in the Polish zones violate the rules of competitiveness which are in force in the countries of the EU. The point is, the European Union legislation anticipates the public financial assistance favoring vitalization of regions in many aspects. The basic forms of public assistance are subsidies for investors and/or support for development of infrastructure in regions; however the requirements are the strict limitation of subsidies, the lack of accumulation of various forms and restriction in "sensitive" sectors.

The public assistance in forms preferred by the EU originates mainly from budgets of countries, supporting activities of private investors and regional authorities. Therefore these are worked out funds which the disposer can redi-

² Korenik S., *Uwarunkowania ekonomiczne tworzenia specjalnych stref ekonomicznych* (Economic arrangements of creation special economic zones), Wrocław 1998.

³ 16 special economic zones exist in Poland: Mielecka, Katowicka, Suwalska, Legnicka, Łódzka, Wałbrzyska, Kamiennogórska, Kostrzyńsko-Słubicka, Słupska, Starachowicka, Tarnobrzaska, Tczewska, Warmińsko-Mazurska, Żarnowiecka, Krakowska and Mazowiecka.

rect, according to accepted priorities. The budget of Poland, substantially smaller and encumbered with innumerable obligations, does not have at its disposal equal funds. This situation has to change and certainly it will in connection with integration of Poland with the European Union.

It should be anticipated that the EU will not demand an immediate closure of all zones but relinquishing of prohibited forms of public assistance, i.e. abandoning of export relief or accumulation of public assistance. It is also possible to introduce amendments in legal clauses referring to the public assistance and to carry out those changes in such a way that it will not harm interests of investors. It can be benefited from the experiences of other countries from the Middle and Eastern Europe for instance Hungary where economic zones are created according to the European requirements. Investors can be granted subsidiaries up to 50% of buried costs on investments or creating new jobs in those separated zones. The zones aiming to attract investors are created in the frame of regional development programs. Special support was anticipated in the zones for small and medium companies. The zones become the territories of increased economic activities and such a possibility is allowed under the European Union legislation, and then the regions will be able to use the structural funds aimed for the regional development.

Apart from the armaments and solutions which will be accepted in the nearest time it should not be expected any quantity and quality development of special economic zones in Poland.

The zones should not and most likely in the near future they will not play a role of the tool to increase the economic development of selected (problematic) areas of the country and the level of employment, in other words the improvement of the situation on the labor market. This function should be taken over by the policy of regional development which once of the objectives should be equalization of the standard of living (incomes) and of chances of inhabitants of given areas of the country on the labor market. This requires an increase and an adequate direction of public expenditures on structural changes. One of the most significant arguments should be also this one according to which on financing the costs of this policy a great amount of structural funds of the EU can be directed.

Among instruments of the regional development policy of the European Union four basic tools can be determined⁴:

1. Programming of the regional development composed into the strategy of social and economic development of the country;

⁴ Kryńska E., *Polskie strefy ekonomiczne – zamierzenia i efekty* (Polish special economic zones – intentions and effects), „Scholar”, Warszawa 2000.

2. Financial support of the regional development by the means of credits on interest below the market rate, capital subsidies, increased amortization of assets, subsidies related to creation of new jobs and regionally oriented indirect financial tools of a public character (funds for credit insurance policies, capitals of a greater risk – venture capital) applied in regions with the lack of supply of such a type of capital from the side of private institutions;
3. Development of technical infrastructure and non-pecuniary instruments servicing the improvement of quality of the business environment in problematic regions. This assistance does not refer to the concrete economic bodies but to all companies located in the given region. Priorities concerning this zone embrace two basic directions: assistance for the development of local infrastructure (water supply, sewage management, protection of the natural environment, transportation and telecommunication facilities and creation of industrial zones) and development of strategic technical infrastructure in the national and European scope (Trans-European infrastructural network);
4. Non-pecuniary instruments of support for regional development servicing the influence on the quality of the business environment undertaken in various forms, i.e. access to information and consultant services, trainings, education, support for scientific research and development of technology.

Polish special economic zones from the very beginning of their existence have become one of the most controversial points in the negotiations between Poland and the European Union. Poland has to adopt the rules which are in force in the European Union. It implies from the European treaty signed by our country on 16 December 1991. According to art 68 of the subject treaty Poland is obliged to undertake all necessary steps aiming towards cohesion and harmony of its future legislation with the European Union laws although the legal act from 1994 guarantees investors that their privileges (conditions) will not change for worse in 20 years.

In the middle of November 2002 the government accepted the conditions of the European Union concerning closure of the chapter entitled “competitiveness policy” embracing among other things the rules of functioning and the future of zones. For Investors who have started their activity many changes are waiting – the more changes the more the company is. Conditions, negotiated by Poland with the Union will be inserted as amendments into the legal Act of zones, which is to be preceded in the process of legislation very quickly. After its passing investors should start free conversion of their allowances on running activities in the zones into new ones on new conditions. Most of investors operating in the SEZ are anxiously waiting for governmental proposals regarding solutions to issues related to granting of compensations for worsening the conditions of running businesses in the zones. A file of such pro-

posals is in the process of being prepared. Its key element according to the guidelines of the Ministry of Economics is restoration of tax relief on real estate to the investors in the process on passing a legal act. Communes (on which territories the zones are situated) will have to receive compensations for the loss of revenue. It is a sum of approx. 20 mln PLN for which inserting into the budget an acceptance of the Ministry of Economics is required. Another form of compensation is introducing accumulation of income tax paid by companies. The mechanism is to be very simple: after coming beyond 50% limit (or 75%) investors start to pay an income tax. However, the Tax Offices will not transfer it into the state's treasure (revenue), it is to be transferred on special, individual accounts. An investor who after the year 2004 will decide to expand its activity in Poland will be entitled to apply for a new kind of public assistance – the so called “investment grant” (in compliance with the EU regulations). The grant will be paid from this money, which has been collected on its individual account. With one restriction – it will have to happen before 2020.

All those governmental attempts are to soften the reactions of investors on the process of implementing the changes regarding the rules of functioning of special economic zones on the territory of Poland. What results will be achieved it will become known in the next years.

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Streszczenie

POLSKIE SPECJALNE STREFY EKONOMICZNE W KONTEKŚCIE INTEGRACJI Z UNIĄ EUROPEJSKĄ

W połowie lat dziewięćdziesiątych zaczęły powstawać w Polsce specjalne strefy ekonomiczne (SSE) mające na celu przyciągnięcie bezpośrednich inwestycji zagranicznych i pobudzenie rozwoju gospodarczego tych regionów, które charakteryzowały się wysokim bezrobociem a jednocześnie niskim stopniem wykorzystania infrastruktury przemysłowej.

Jednak utworzenie specjalnych stref ekonomicznych i przyznanie w tych strefach szeregu różnych przywilejów dla działających tam przedsiębiorstw (między innymi 10-cio letnie wakacje podatkowe i 50-cio % ulga podatkowa przez następne 10 lat) stało w sprzeczności zarówno z zasadą równości wobec prawa wszystkich podmiotów gospodarczych, jak również z niektórymi postanowieniami Układu Stowarzyszeniowego Polski z Unią Europejską. Dlatego też polskie specjalne strefy ekonomiczne są od samego początku istnienia przedmiotem wielu różnych sporów i dyskusji.

Główną ideą tworzenia takich stref w Polsce była więc potrzeba utworzenia nowych miejsc pracy i wykorzystania w jak najbardziej efektywny sposób istniejącej, a niewykorzystanej infrastruktury technicznej.

Przywileje jakie otrzymali inwestorzy w polskich strefach, oznaczają naruszenie reguł konkurencji obowiązujących w krajach UE. Ustawodawstwo unijne przewiduje pomoc publiczną, sprzyjającą ożywieniu regionów o niższym poziomie rozwoju lub o wysokim bezrobociu, ale w innej formie i pod wieloma warunkami. Podstawowymi formami pomocy publicznej są dotacje dla inwestorów i/lub wspieranie rozwoju infrastruktury w regionach, warunkami zaś – ściśle jej limitowanie, brak kumulacji różnych form i ograniczenie w sektorach „wrażliwych”. Pomoc publiczna w formach preferowanych w UE pochodzi głównie z budżetów państw wspomagających działalność inwestorów prywatnych i władz regionalnych. Są to zatem środki już wypracowane, które dysponent może skierować zgodnie z przyjętymi priorytetami. Budżet Polski, znacznie mniejszy i obciążony licznymi zobowiązaniami nie dysponuje porównywalnymi środkami. Ta sytuacja musi ulec zmianie w związku z integracją z Unią Europejską.

Polska musi dostosować reguły obowiązujące w SSE do zasad obowiązujących w Unii Europejskiej. Wynika to bowiem z zawartego przez nasz kraj Układu Europejskiego z dnia 16 grudnia 1991 r. Zgodnie z art. 68 tego Układu Polska jest zobowiązana podjąć wszelkie starania zmierzające do zgodności jej przyszłego ustawodawstwa z ustawodawstwem UE, chociaż ustawa o specjalnych strefach ekonomicznych z 1994 r. gwarantuje inwestorom, że ich przywileje (warunki) nie mogą zmienić się na gorsze w ciągu 20 lat.

W połowie listopada 2002 Rząd RP przyjął warunki UE dotyczące zamknięcia rozdziału „polityka konkurencji”, obejmującego m.in. zasady funkcjonowania i przy-

szość stref. Warunki te zostaną zapisane w nowelizacji ustawy o strefach, która ma szybko przejść przez ścieżką legislacyjną.

Kluczowym elementem rządowych propozycji ma być ustawowe przywrócenie inwestorom ulgi od podatku od nieruchomości. Gminy na terenie których istnieją strefy, otrzymają rekompensaty z tytułu utraconych dochodów. Inna formą zadośćuczynienia ma być prowadzenie kumulacji podatku dochodowego płaconego przez firmy. Mechanizm ma być prosty, po przekroczeniu limitu 50% inwestycji (bądź 75%) inwestorzy zaczną płacić podatek dochodowy. Jednak Urzędy Skarbowe nie będą go przekazywać do budżetu państwa. Ma on trafić na specjalne indywidualne konta. Inwestor, który po 2004 r. zdecyduje się rozszerzyć swoją działalność w Polsce, będzie mógł wystąpić o nowy rodzaj pomocy publicznej – tzw. grant inwestycyjny (zgodny z unijnymi regulacjami). Zostanie on mu wypłacony właśnie z pieniędzy, które zgromadziły się na jego indywidualnym koncie. Z jednym zastrzeżeniem – będzie to musiało nastąpić przed 2020 r.

Wszystkie te rządowe zabiegi mają na celu złagodzenie reakcji inwestorów na proces zmiany zasad funkcjonowania specjalnych stref ekonomicznych na terenie Polski. Jakie przyniesie to skutki okaże się w najbliższych latach.

ENTERPRISE IN EURO-AREA CHANCES AND DANGERS

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Foreword

In the next time Polish enterprises will have to meet the challenges connected with the Poland's EU accession. The adaptation of the activity rules to the rules of the common EU market brings many chances but also dangers.

With the European Union accession Poland will have to take decision regarding the acceptance of the community transformation plans resulting from the so-called Strategy of Lisbon, which has been accepted for the years 2000 – 2010 by the fifteen countries. The basic aim of the accepted strategy is an improvement of the competitiveness of the European Union and structural reforms are the method.

The main assumptions of this strategy are: the enterprise development, market liberalization and integration, modernization of the social model, knowledge-based economy development acceleration, strengthening of the equalized development. The aim is creation of a possible dynamical and competitive economic zone in the world.

Active supporting and participation in the realization of the Lisbon Strategy are in Poland's interest. From a strategical viewpoint, our country shall, first of all, declare for the improvement of the conditions and enterprise strengthening as well as market liberalization and integration. Poland shall also be interested in more pro-development forming of the public expenditures. Form the viewpoint of Polish economic subjects a supporting of the Lisbon process and adaptation of its strategies to its requirements are advantageous.

The enterprise development in form of the existing companies and establishing of new enterprises as well as regal regulation of the company activity will cause that the development of the small and medium-large enterprises will

be our advantage due to the existing conditions because the most large enterprises have been already overtaken by foreign investors and our influence on their development is limited. The progressing globalization will still limit the possible growth creation in this enterprise sector.

According to the report ordered by the European Commission the participation of the small and medium-large enterprises in the economic subject structure correspond with the enterprise size structure of the European Economic Area.¹

The European Economic Area (EEA) consists of European Union member countries and Island, Switzerland, Norway and Liechtenstein.

According to the investigations carried out, the average employment in the EEA amounts to 6 persons (in the better industrialized countries, e.g. Germany, Holland higher and e.g. Italy, or Greece lower). The average employment in USA amounts to 19 persons and in Japan 10 persons. These are therefore microenterprises according to the EU classification.²

In the EEA there are 20,5 million enterprises and 99 % of them are companies, employing less than 50 Persons and 93 % less than 10 persons. 0,2 % enterprises employ more than 250 employees.

The situation of the UE candidate countries is as follows:

- 5,8 million companies employing almost 30 million people
- average employment 5 persons
- 72 % persons are employed by small and medium-large enterprises.

Having analysed the above-mentioned data we can state, that the Polish enterprise size structure does not disturb the economic integration process.

The activity of economic subjects within the common market before and after Poland's European Economic and Monetary Union accession is the investigation objective of this article.

¹ comp. R. Sołtyk, *Europa małym biznesem stoi*, Gazeta Wyborcza, No. 18.03.2003, pg.13

² Przedsiębiorstwa średnie: zatrudnienie poniżej 250 pracowników, roczny obrót mniejszy od 40 mln EUR

Przedsiębiorstwa małe: zatrudnienie poniżej 50 pracowników, roczny obrót mniejszy od 7 mln EUR

Mikroprzedsiębiorstwa: zatrudnienie poniżej 10 pracowników, roczny obrót mniejszy od 2 mln EUR

The essence features of the Economic and Monetary Union and its importance for the European integration

Signing of the treaty in Maastricht on the 7th February 1992 was a very important step in the European Union establishing process. On the strength of this treaty the European Economic Community (1957) has been transformed into European Community which is the foundation of the European Union together with the European Community for Coal and Steel (1951) and European Community for Atomic Energy (1957).

On the strength of the Maastricht treaty, the European Union is based on three pillars:

First pillar includes the foreign cooperation matters. It consists of three communities: European Community, European Community for Coal and Steel and European Community for Atomic Energy.

This is the only pillar of economic nature, which consists of the following components:

- Economic and Monetary Union
- Customs Union
- Interior market
- Common agricultural politics
- Structural politics

Within the first pillar the member countries decided to give up some national powers and transfer them onto the EU institution level. This is an example for the cooperation on the base of the so-called community method providing that national competence shall be transferred to the EU overnational institutions. The union realizes also the industrial, transportation, structural and regional, consumer protection, science and research and other politics. The integration extension caused that the integration includes more and more extra-economic aspects.

The signing (February 1992) and coming into force (November 1993) of the treaty of Maastricht was an important moment. According to the provisions of this treaty two new pillars appeared. **The second pillar is the foreign and security politics and the third one is the justice.**

Prior the description of the chosen aspects of the enterprise functioning within the Euro area some information on the Economic and Monetary Union (EMU) which is the base of the European economic integration.

Economic and Monetary Union establishing stages

The EMU establishing process consists of three stages:

- First stage - from 1st July 1990 to 31st December 1993, creation of a uniform interior market, based on the so-called four freedoms: freedom of free flow of goods, services, person and capital within the EU.

- Second stage - from 1st January 1994 to 31st December 1998. The most important task of the countries in this stage was to meet the EMU accession convergence criteria as well as to establish the European Monetary Institute - the predecessor of the European Central Bank.
- Third stage - from 1st January 1999 to 31st December 2001 - gradual introduction of the common currency into circulation.

The common monetary politics, conducted by the European Central Bank resident in Frankfurt/M., the successor of the European Monetary Institute is the essence of the EMU. The European Central Bank System has the exclusive right for Euro currency issue.

On the base of the so-called Scenario of Madrid (May 1995) the basic rules for the implementation of the new currency was defined. It has been also agreed that the name of this currency is Euro and that 1 Euro consists of 100 cents.

The EMU consisted of 11 countries and on the 1. January 2001 Greece joined this group. The following countries are not member of the monetary union: Sweden, Great Britain and Denmark.

The EMU member countries have lost the right to independently create their interest rates and currency exchange rates, which is constant in relation to Euro currency. The member countries have practically lost the possibility to influence their economic situation using the monetary politics tools and, as a result of the Madrid conference, using the fiscal politics tools.

The autonomy limitation in the scope of a free monetary and fiscal politics creation has to enable the common currency to develop itself and assure a durable and stable economic growth within the Euro area.

In order to become a member of the economic and monetary union the candidate countries must fulfil the following convergence criteria, which have been agreed on the strength of the treaty of Maastricht.

Convergence criteria:

1. Inflation may not exceed the average inflation rate of three EU countries with the lowest inflation by more than 1,5 percent point.
2. Long-term interest rates may not exceed inflation rate of three EU countries with the lowest inflation by more than 2 percent points,
3. Budget deficit may not exceed 3 % of the GNP,
4. Public debt may not exceed 60 % of the GNP,
5. Stable currency exchange rates during the last 2 years.

A low inflation rate is a very important factor regarding the stable economic growth. As a result of the disinflation having been realized since the beginning of the economic transformation the inflation rate of all candidate countries do not exceed 10 %. According to the data from the end of 2002 the inflation rates in Poland, Czech Republic, Estonia, Malta and was lower than the reference rate which amounted 3,2%. Lithuania, Latvia and Slovakia nearly met

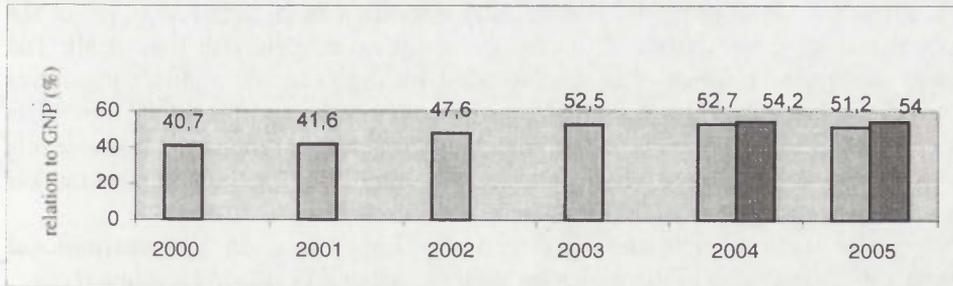
this criterion and the highest inflation was in Hungary (5,6%) and Slovenia (7,4%).

The long-term interest rate values is a resultant of the market participant expectations towards the future economic situation and, first of all, the economic growth rate, price stability and public finance sector balance. The lower the rate differences between the monetary area countries the higher the economic convergence grade of the economic systems. According to the data of Deutsche Bank Research form July 2002 the long-term interest rates will be lower than the reference rate of 7,1% for 2002 in three countries only (Czech Republic, Estonia and Latvia). Poland, Slovakia and Hungary almost meet this criterion since the long-term interest rate is higher than the reference rate by less than one percent point. Slovenia (11,1%) and Latvia (9,3%) have the highest interest rates.

The budget deficit results from the fiscal politics and betokens the equalization grade of the public finance sector. The economic politics European Union and Euro area candidate countries tends to limit the deficit of the state budget and public finances sector and it meets the requirements of the commonly accepted principle of the budget balance. In present only Estonia, Lithuania, Latvia, Slovakia and Slovenia fulfil the convergence criterion. According to the macroeconomic prognosis of the Finance Minister and the present public finance situation Poland is not able to fulfill this condition in the next time.

All economic and monetary union candidate countries fulfill the criterion of the public debt high in relation to the gross national product. Estonia has achieved the lowest and Hungary the higher index for the year 2002.

Diagram 1. Public debt increased by the foreseen amount of the warranties and guarantees.



Source: Finance Ministry homepage

³ comp. Biuletyn analiz UkiE No. 10, X 2002

⁴ comp Biuletyn analiz UkiE No. 10, X 2002

In present Poland fulfills the analysed criterion. However, the tendency of the indices in the last years is alarming. Its level approaches the limit of 50 % and according to the finance act defined fiscal limitation must be introduced regarding to, e.g. the allowed budget deficit of the state and self-government units are required. The commonly postulated throughout public finances reform must be introduced in order to change the public debt tendencies.

The currency exchange rate criterion within the last 2 years before the European Union accession depends on the candidate country accession and conditions provided in the European exchange rate mechanism.

It is interesting, that only three countries: France, Luxembourg and Finland would belong to the Economic and Monetary Union, if all convergence criteria would have been strict observed. Great Britain also fulfilled the convergence criteria but the accession of this country has been delayed on the strength of the treaty of Maastricht. At that time the most countries did not fulfil the criterion of the relation of the public debt to the GNP. However, it has been agreed, that the height of this index shall show a decreasing tendency because it may not be decreased during a short time.

Advantages of the establishing of the economic and monetary union

The acceptance of the common currency shall bring advantages to the new candidate countries, which can be divided into microeconomic and macroeconomic advantages. The first group includes, first of all: reduction of the exchange rate risk and currency costs on the one hand and economic stabilization on the other hand.

Economic stabilization

A macroeconomic advantage from the view-point of the enterprises. The stabilization of the economy is especially important from the view-point of the economic subject activity as it means the lower investment risk first of all. The macroeconomic balance shall be provided by the common monetary politics within the Euro area. The establishing of the economic and monetary union has caused an inflation pressure reduction and approaching of the interest rate levels in the member countries, what is enormously important for the common market enterprises.

The increasing of the Euro currency importance on the international monetary market due to the monetary union extension is also to be pointed out.

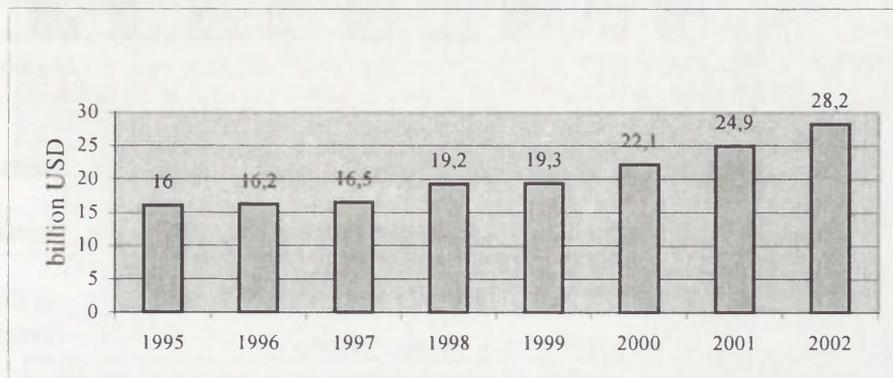
Exchange rate risk elimination

The elimination of the currency exchange rate means a reduction of the uncertainty resulting from the exchange rate fluctuations, what is important for both the enterprises and consumers.

Exchange rate risk elimination within the Economic and Monetary Union as well as reduction of the currency exchange transaction and exchange rate risk assuring operation costs were an effect of the Euro currency introduction. This way the economic (especially trade) activity has become easier.

It is important because the percentage of our export to the EU countries amounts 71,2 %⁵ Furthermore the export to the EU countries systematically increases. In 1995 the export value was ca. 16 billion USD and in 2002 28,2 billion USD.

Diagram 2. Polish export to the European Union countries



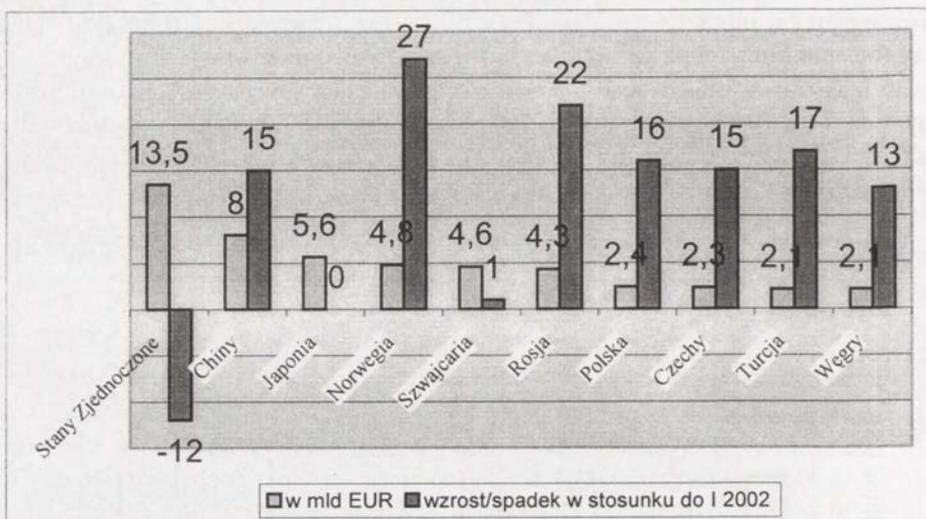
Source: Polish statistical office Główny Urząd Statystyczny

According to the data for January Poland takes the 7. place among the largest exporters exporting to the European Union countries. In addition to the 16 % growth dynamics compared to January 2002 we may state, that the common market importance in the commercial relations with Poland increases. Therefore, the exchange rate risk reduction due to the Euro area accession shall cause a significant drop of the possible risk costs for Polish exporters.

The exchange rate risk reduction is important as the Polish enterprises not sufficiently use the tools to limit the negative influence of this risk. The sales of the currency forward contracts at the Polish Stock Market in Warsaw confirm this thesis.

⁵ comp. J. Bielecki, *Na podbój Jednolitego Rynku*, Rzeczpospolita, No. 101(6481), pg B1

Diagram 3. Largest exporters exporting to the European Union countries, data for I 2003



Source: Eurostat

Table 1. Currency forward contracts, stock market in Warsaw

forward contracts (total)					
	2002	2001	2000	1999	1998
number of transactions during a session	4 229	4 953	2 163	359	63
total sales (million PLN)	77 334	98 646	58 612	6 368	602
forward contracts into EURO					
number of transactions during a session	8	16	7	3	---
total sales (million PLN)	235	565	424	168	---
forward contractw into ESD					
number of transactions during a session	7	15	5	2	0
total sales (million PLN)	247	590	253	186	5

Source: stock market in Warsaw, Homepage

The EURO and USD forward contract participation in the total forward contract sales was only symbolic and amounted to 0,62 % (2002).

Integration and better efficiency of financial markets

The establishing of the Euro area contributes to creation of more efficiency and liquid financial markets and influences their gradual integration.

It influences the optimizing of the capital allocation by the enterprises and the possible creation of a capital structure politics. The European Union membership shall cause a reduction of the abroad capital achievement costs. Probably the interest rates of the European Central Bank System will be lower after Poland has accessed the European Union.

After the EU accession the possibilities of loans and credits shall be expected, especially from the European Investment Bank, World Bank, European Bank of Reconstruction and Development as well as Development Bank of the Council of Europe. The credit achieving possibilities shall get easier and more profitable.

Price lever equalization in Europe

This process is necessary regarding the forming of the uniform European market and competitiveness strengthening.

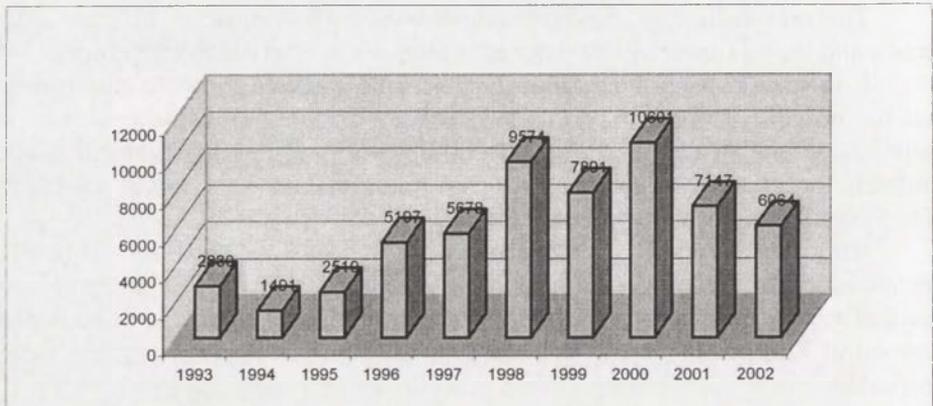
Through the acceptance of the Euro currency the market transparency will become better since the price comparison is easier so that optimal decision regarding purchase and sell of goods and services may be taken.

Integration with UE as factor which positively influences the growth of foreign investments

Poland's European Union integration and in future also economic and monetary union accession may contribute to a change of the negative trend in the foreign investment creation in Poland taking place during the last 4 years. The liberalization of the capital flow regulations in accordance with the European Treaty has been dynamized due to the Poland's OECD accession in 1996. Unfortunately, since 1999 foreign investment growth tendency breakdown occurred. The foreign investment value in 2002 was approximately the same as in 1997. It is very disadvantageously regarding both the economic development of the country and macroeconomic parameters.

According to the results of the structure of the prior foreign investments in Poland the European Union area countries play an important part. According to the foreign investment agency within the 50 largest foreign investors 39 are European Union companies (30 from the Euro area, 2 international companies (EBOiR and Eureko BV), 5 from USA, 1 from Switzerland, 1 from South Korea, 1 from Cyprus and 1 from Russia. 90 % of the foreign investors come from the UE countries.

Diagram 4. Foreign investments in Poland, in million USD



Source: Polish Foreign Investment Agency

The previous inflow of foreign investments was caused by the possible access to a big sell market and relatively low prices for the enterprises.

Differences of the minimal pay between some countries:

- Poland 201 EUR
- France 1154 EUR
- Great Britain 1105 EUR
- Holland 1249 EUR

Unfortunately, a drop of Poland's investment attractiveness is evident – we are beaten by e.g. Slovakia and Hungary.

The optimistic evaluation of the Poland's EU accession consequences causes, that a direct foreign investment inflow is expected, which is necessary to modernize our economy. From the view-point of foreign investors the EU membership shall be a factor which strongly limit the political and economic investment risk. Surely, the acceptance of EU regulations regarding competition, company regulations, market liberty shall contribute to a growth of the investment attractiveness of Poland. However, the other candidate countries will have similar advantages. The Poland's EU accession is no warranty for a foreign investment growth, if no interior possibilities of attractiveness increasing will be created.

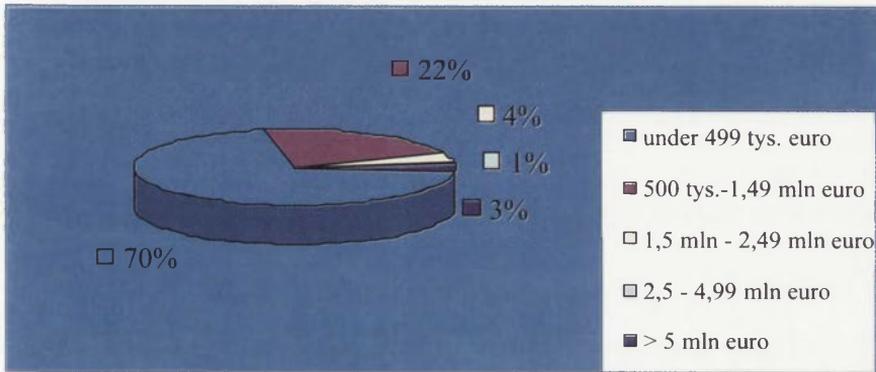
Costs and dangers of the Economic and Monetary Union extension

Apart from the important advantages for enterprises, resulting from the Poland's economic and monetary accession the costs and dangers of this process must be taken into consideration.

The adaptation to the valid regulations is an important factor influencing the functioning of the enterprises after the EU accession. Polish companies evaluate their general adaptation level as 1,8 and this is the lowest result among the countries investigated within the programme coordinated by Eurochambers – association of European Industrial and Commercial Chambers. 57% of the subjects have not started their preparations yet and only 9% declares a full adaptation to the EU regulations.⁶

According to an opinion poll 70 % of the enterprises expect, that the EU accession costs shall not exceed 0,5 million EUR. Only 3 % of the poll participants evaluate these costs as higher than 5 million EUR.

Diagram 5. Polish enterprises common market adaptation costs



Source: J. Domagała, *Dzwonek alarmowy*, Rzeczpospolita, No. 6479, pg.4 (appendix Nasza Europa)

The monetary union accession costs for enterprises include:

- 1) computer system Euro adaptation costs
- 2) training costs
- 3) cash devices adaptation costs
- 4) costs of lost of some incomes of institutions from the currency exchange, guarantee transactions and international payments.

Compared to the other European community candidate countries Polish companies evaluate their business perspectives not so optimistic. 41 % of the poll participants evaluate them as optimistic and the average for 10 countries under the research amounts to 60 %. The business perspectives are pessimistic for 29 % of the enterprises - average 17%. 30 % is of the opinion that the accession will have no influence on their activity (average 19%). Polish enterprises

⁶ comp. J. Domagała, *Dużo do zrobienia*, Rzeczpospolita, Nr 6519, appendix Nasza Europa, pg 11

especially fear the unemployment rate increasing due to bankruptcy as well as the strengthening competition of other European companies.⁷

The scope of the adaptation of Polish enterprises may be a competitive superiority factor or dangerous for the functioning of the unit. The making use of the chances created by the Poland's EU accession depends on the enterprises themselves.

The process of the adaptation of Polish economic subjects to the conditions of the EU will last some years. But transitory period costs will be caused, which result from the missing adaptation to the conditions, which have a significant influence on the competitive position of these enterprises.

Apart from the chances new dangers will be also present. We will have to solve such problems as the missing elasticity of the Polish market, excessive bureaucracy, which hampers the access to new technologic and EU capital, common market competition.

The form and activity conditions of these enterprises will also depend on the accepted strategy of Polish government. The structural reforms shall protect the market against:

- accelerated inflation,
- excessive currency value, which could influence the export-orientated companies
- foreign capital inflow, causing an unsettling of the inland market.

6 years ago, when Great Britain took the decision to delay the Euro area accession after 6 years it defined five conditions which must be fulfilled in order protect the British economy at the Pound / Euro change process:

- the domestic economic cycle shall agree with the Euro area economic cycle,
- no technical barriers for the currency change,
- the Euro currency shall not be dangerous for the position of London as a financial center,
- the conversion into Euro shall improve the conditions form foreign investments,
- the introduction of the common currency shall contribute to an economic stabilization of Great Britain.

The unstableness, which may negatively influence the economy is the most important barrier, pointed by the British Finance Ministry.

The evident appreciation of Euro in relation to USD (during ca. one year the markets enormously increased the European currency by 26 % in relation to USD) is an important barrier for the overcome the bed conjuncture in Europe and increases the recession risk. Therefore, according to Eurostat, the European

⁷ comp. J. Domagała, *Dużo do zrobienia*, Rzeczpospolita, Nr 6519, appendix Nasza Europa, pg 11

Union economy stopped to develop itself in the I quarter of this year compared to the same period of the previous year.

Strong Euro is especially inconvenient for countries where the national gross product depends on the export outside the Euro area (Germany).

Poland's way to the Euro area

Before Poland access the economic and monetary union and PLN can be replaced by Euro the above mentioned conditions of the Treaty of Maastricht must be fulfilled and the obligations must be accepted, that they shall not change for two years. The agreement including the above mentioned obligations is called ERM 2 (Exchange Rate Mechanism 2).

The 2 years participation in the European Exchange Mechanism is necessary for the Euro area accession. During this time the currency exchange rate may not be more than plus/minus 15 % in relation to the mechanism entrance level. If the currency fulfill the above mentioned condition during the ERM time and the country fulfills other criteria of Maastricht it may become a member of the Economic and Monetary Union.

Both the Finance Ministry and the Polish central bank have declared that Poland will soon meet the required conditions. They have also stated that the year 2007 is earliest possible Euro area accession date.

However, we must ask a question regarding the time and accession of Poland's Euro area accession.

The scenario which foresee an early Euro area accession shall be promoted since it is very convenient for Polish companies now and in future.

A soon economic and monetary union accession enable us to avoid speculative influences on the national currencies while the ERM 2 participation time. It is possible, that the significant difference between the interest rates of the new member countries and the Euro area interest rate will cause many financial market subjects to use this phenomenon to achieve a prompt profit, what may cause significant fluctuations of the exchange rates of the new countries in relation to Euro.

However, the analytical center Deutsche Bank Research warned in July 2002 in the 8. issue of the Monitor against the accession of possible high number of new countries to the economic and monetary union. The adaptation of the activity rules of the Euro area to the participation of the representatives of the new member countries must take place undisturbed because any decisive process hindrance could be negatively evaluated by the financial market participants and, as a consequence, weak the value of the European currency. The authors of that elaboration were of the opinion, that only a gradual accession of new countries will strengthen the reliability of the whole Economic and Monetary Union extension process.

However, the accession date principally depends on the fulfillment of the conditions ensuring the access to the above-mentioned profits to our country. The example of Great Britain proves, that one should not hasten to decide on the Euro area accession. Presently, the most important indices regarding inflation (this year 1,6 %, in the Euro area 2,7), unemployment rate (less than 5%, Euro area 8,5%), economic growth (yearly ca. 3%, in the Euro area within the statistical error limits) are significantly better in Great Britain than in the Euro area. On the other hand the Euro advocates in Great Britain say, that the trade lost of the British economy duo to the being outside the Euro area amounts to 20 billion Pounds yearly.⁸

The problem is, that after the EU accession the basic indices of the monetary politics will not more created by the local monetary authority in accordance with its needs. The monetary politics will be realized in accordance with the needs of the Union as a whole. An inflation pressure or recession may take place, if a country, having accessed the European Monetary Union, will not be able to maintain the evolution of its own monetary indices in accordance with the EU evolution. If, in addition, this country will fail to structurally adapt itself regarding its competitiveness, a serious collapse can occur.

In addition to this, the prohibition of recession counteraction using the traditional expansive fiscal politics has been introduced on the strength on the treaty of Amsterdam and the stabilization and growth pact ahs been agreed at that time.

The economic situation of Poland, especially the missing flexibility of the labor market, goods markets competitive mechanisms restrictions, excessive bureaucracy or structural defects of the state budget (expenditure structure, tax system, indebtedness installment repayment problem etc.) causes that the above mentioned problem becomes very real.

The achievement of the convergence conditions and accepting of the common currency without a priory analysis of the consequences of negative scenarios may negatively influence the future economic development of Poland.

The economic conditions shall be taken into account, which should, first of all, ensure a safe functioning of the national economy within the Economic and Monetary Union, that means, should enable the economy to achieve the necessary convergence of a stable nature.⁹

⁸ comp. A. Wielopolska, *Drzwi do euro nadal otwarte*, Rzeczpospolita, Nr 133 (6513), pg B5

⁹ comp. K. Lutkowski, *Data przejścia na euro jest sprawą drugorzędną*, Gazeta Bankowa, pg 28, 31.03.2003

The question is, that apart from the “nominal convergence” based on the fulfillment of the conditions of the treaty of Maastricht, a “real convergence” occurs as prompt as possible.¹⁰

It may be described as a state, where the long-term growth of the GNP agrees with the productional potential of the country, the employment rate is high, and the trade and payment balances show balances do not cause any deflation pressure or excessive indebtedness. It depends on the competitive abilities of the economy.

The estimation of a convenient PLN exchange rate in the economic and monetary accession time is an important problem from the view-point of the Polish economy. It shall have many consequences for the activity of the economic subjects because this exchange rate may not be changed in future.

The ERM-2 entrance exchange rate is agreed by negotiations between the European Commission and European Central Bank on the one hand and government and central bank of the given country on the other hand.¹¹

The quotations from the last years before the ERM –2 accession but also trade deficit, currency reserves, unemployment rate and competitive abilities of the economy are the base for the fixing of this exchange rate.

The present low Euro exchange rate is good for the Polish economy. The countries, which accessed the monetary union in the past, wanted to achieve possible low Euro exchange rate of their own currencies in the negotiations in order to support the competitiveness of their goods on the unified market. At present, Euro exchange rate is high (ca. 4,3 PLN/Euro now, 3,59 PLN/Euro one year ago). Regarding the competitiveness of Polish goods on the EU market the high exchange value shall maintain to Mai 2004, that is to the expected accession of Poland and possible introducing of PLN into the ERM –2.

Conclusion

The European community accession of new countries shall contribute to a growth of the Europe’s economic importance in the world and to realization of the conditions of the strategy of Lisbon.

According to the report by The Economist Intelligence Unit, the participation of the common market in the “gross world product” after extension amounts to 30,9%, USA 30,5%, Japan 11,9%, other countries 26,7%. The presented data suggest that the European Union is the worldwide greatest economic area. However, the per capita value analysis shows the domination of USA because the number of inhabitants of USA is 290 million and of the extended

¹⁰ comp. K. Lutkowski, *Data przejścia na euro jest sprawą drugorzędną*, Gazeta Bankowa, pg 28, 31.03.2003

¹¹ J.Bielecki, H.Bińczak, *Wybrać najlepszy moment*, Rzeczpospolita, No. 110(6490), pg B1

European community 380 million. The question is, whether the extension of the European Union will be a catalyst or restrain for the development of the European community countries. Even if Europe will be in future able to overtake USA by yearly 0,5% the EU per capita GNP will equal the American one after 70 years.

The extension of the European Union and, as a consequence, of the Economic and Monetary Union shall contribute to an increasing of the importance of the Euro currency and acceleration of the economic growth rate. The participation of Polish enterprises in this process is an enormous development chance, provided that the microeconomic and macroeconomic conditions will be properly prepared for the common market entrance.

The stress is laid on the fulfillment of the nominal convergence conditions, assuming, that it is probable, that the EU and Euro area accession automatically causes the realization of the real convergence process. This situation is in all respects good. However, if it will not take place the consequences for the economic subjects may be almost unforeseeable. The Polish activities shall concentrate on the possible prompt assuring of the necessary circumstances, which would formally enable Poland to be able to access the Euro area, but first of all, that this accession is safe and good for the economy.

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Streszczenie**PRZEDSIĘBIORSTWO W STREFIE EURO - SZANSE
I ZAGROŻENIA**

Rozszerzenie Unii Europejskiej, a w konsekwencji Unii Gospodarczej i Walutowej, winno przyczynić się do wzrostu znaczenia euro na świecie oraz przyspieszenia tempa wzrostu gospodarczego. Udział polskich przedsiębiorstw w tym procesie stanowi dla nich olbrzymią szansę rozwoju, pod warunkiem właściwego przygotowania warunków mikro- i makroekonomicznych wejścia na wspólny rynek.

Obecnie w dyskusjach kładzie się nacisk na konieczność spełnienia nominalnych warunków konwergencji, uznając prawdopodobnie, że wejście do UE oraz strefy euro automatycznie spowoduje realizację procesu konwergencji realnej. Jest to sytuacja ze wszech miar pożądana, jeśli jednak to nie nastąpi, konsekwencje dla podmiotów gospodarczych mogą być trudne do przewidzenia. Działania ze strony Polski powinny skupiać się na tym, aby możliwie szybko zaistniały okoliczności niezbędne do tego, żeby wejście euro stało się formalnie możliwe, ale przede wszystkim bezpieczne i korzystne dla samej gospodarki.

Przedmiotem rozważań niniejszego artykułu jest przedstawienie szans i zagrożeń funkcjonowania podmiotów gospodarczych w ramach wspólnego rynku, przed i po przystąpieniu Polski do Unii Gospodarczej i Walutowej.

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PENSION SYSTEM IN POLAND IN THE CONTEXT OF INTEGRATION WITH THE EUROPEAN UNION

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The development and implementation of a pension system in Poland with due consideration for the solutions adopted in member states of the European Union is one of key issues relating to Poland's accession to the European Union. Important as the issue is, its coverage is somewhat marginal.

This situation can be justified by the fact that the pension systems operative in the countries of the European Union are not uniform, and the European law on social security, classified under the category of the secondary supranational legal system in Europe "merely" coordinates the implementation of national norms with respect to persons moving within the Community¹.

Pension systems operative in the members states of the EU are largely diverse. There are universal and particular pension schemes whose organisation, principles of financing and conditions of benefit eligibility, pension age and other legal elements are history oriented and dependent on legal traditions of a given country, its level of social and economic development as well as a number of demographic factors.² The legal provisions concerning social security in EU member states guarantee protection against inability to work due to old age in three pillars: universal, group, and individual (the last two being obligatory or voluntary). Pension schemes are capital or repartition in nature. The amount of old-age pensions largely depends on the age of the beneficiary, duration of a contribution period, occupation, size of a family, and material standing. Retirement start age is set at 60-65 years of age. In the majority of countries law prohibits or restricts employment of pensioners. Under the social protection legal provisions binding in the EU countries, there are two methods

¹ A.M. Świątkowski: *Europejskie prawo socjalne. Vol. III. Europejskie prawo ubezpieczeń społecznych.* (Dom wydawniczy ABC: Warsaw, 2000), p. 15.

² T. Bińczycka-Majewska: *Koordinacja systemów zabezpieczenia społecznego w Unii Europejskiej.* (Kantor Wydawniczy Zakamycze: Zakamycze, 1999), pp. 240 and 282.

of calculating the amount of pensions. According to the first one, pensions are fixed and index-linked amounts with respect to the average salary or the prices of basic products and services. According to the other method, the amount of a pension is determined individually for each pensioner. In principle, social security schemes apply minimal and maximal indicators in determining the amount of a retirement pension.³

This diversity is a considerable hindrance in laying down the principles for the open coordination of pension schemes so that they guarantee adequate protection of beneficiaries (and their families) moving within the Community, and, on the other hand, do not constitute an unreasonable burden to individual members states.

In the light of *acquis communautaire* relating to the coordination of various social security systems, two types of pensions have evolved⁴:

- a national pension scheme, provided under internal legislation in a manner that does not require the procedure of aggregating periods of insurance or residence;
- a pension scheme under the provisions of the Council Regulation⁵, where the right to receive retirement benefits results from the aggregation of periods of insurance and residence.

In view of the above, questions arise whether the direction of changes in the social security system in our country was a proper one and whether the reformed system will safeguard the existence of its future beneficiaries on a level comparable to other European countries.

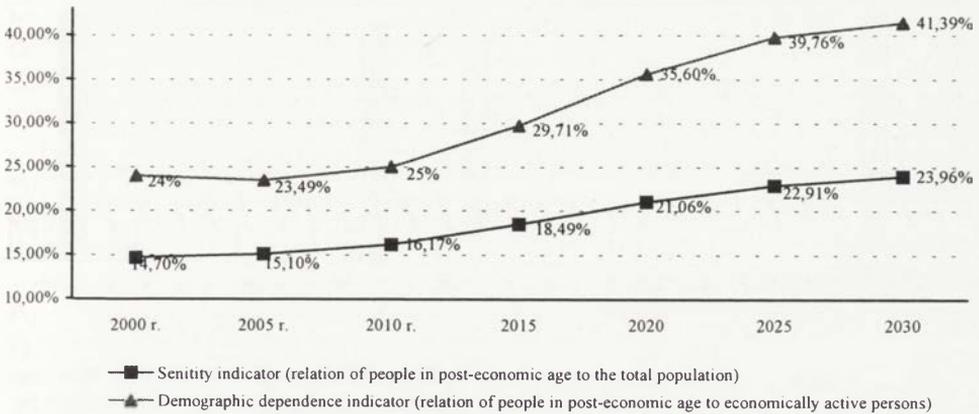
Replacing the repartition system based on a clearly defined benefit with a three pillar system that diversifies the sources of future retirement pensions was a necessity that was primarily prodded by demographic and economic assumptions (Figures 1, 2, and 3). Failure to implement such changes would have invariably led to a serious breakdown of the system in not too distant future with all the negative economic and social consequences.

³ A.M. Świątkowski: *Europejskie prawo socjalne...*, op. cit. pp. 231-276. Cf.: *Social Security Programs Throughout the World: Europe, 2002. Social Security Administration*, pp. 34-209. ; B. Wiktorowska : „Świadczenie godne emeryta”, *Nowe Ubezpieczenia* 2003, No. 8, pp. 20-21.

⁴ T. Bińczycka-Majewska: *Koordinacja systemów...*, op.cit., p. 283.

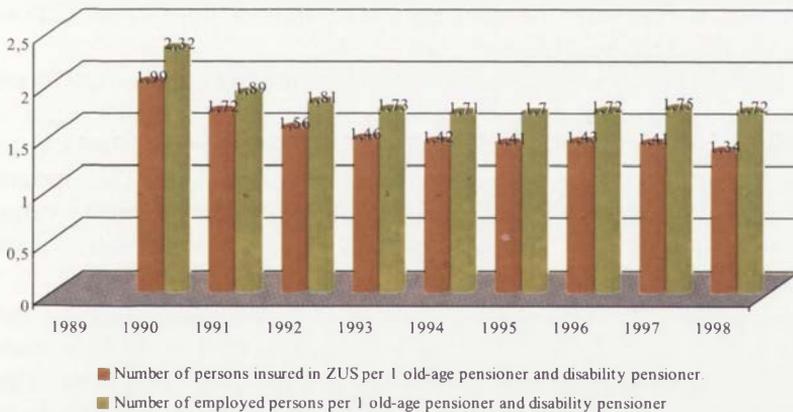
⁵ Regulation (EEC) No. 1408/71 of 14 June 1971 on the application of social security schemes to employed persons, to self-employed persons and to members of their families moving within the Community, OJ L 149 with numerous subsequent amendments and Regulation (EEC) No. 574/72 of 21 March 1972 laying down the procedure for implementing Regulation (EEC) No. 1408, OJ L 74 of 27 March 1972

Fig. 1. Prognosis of the senility indicator and demographic dependence indicator in Poland in the years 2000 – 2030



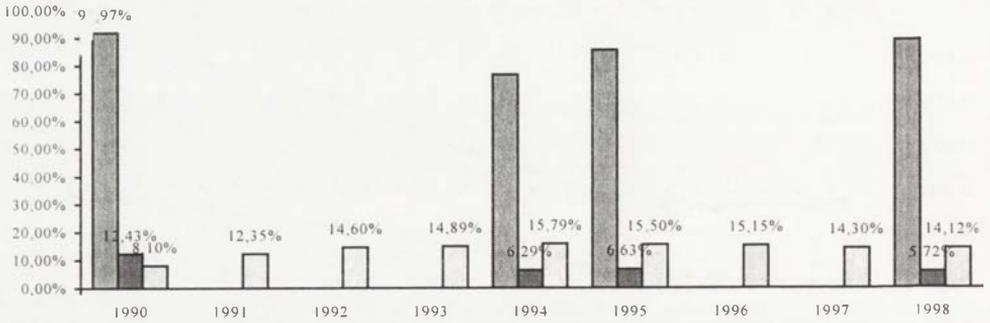
Source: Author's own calculations based on the population by voivodship distribution, sex and age. On-line Statistical Service GUS [Main Statistical Office], http://www.stat.gov.pl/serwis/prognoza_ludn/00.htm.

Fig 2. The number of employed persons and persons insured in Zakład Ubezpieczeń Społecznych [Social Security Office] per 1 old-age pensioner and disability pensioner in the years 1990 - 1998



Source: Author's own calculations on the basis of Statistical Yearbook 1993. (GUS: Warsaw, 1993), p. 215; Statistical Yearbook 1995. (GUS: Warsaw, 1995), p. 156; Statistical yearbook 1997. (GUS: Warsaw, 1997), pp. 128, 166; Statistical yearbook 1999. (GUS: Warsaw, 1999), pp. 129, 164.

Fig. 3. Old-age pensions and disability pensions in Poland in relation to GNP in the years 1990 - 1998



Source: Author's own calculations based on Statistical Yearbook 1993. (GUS: Warsaw, 1993), p. 133; Statistical Yearbook 1995. (GUS: Warsaw, 1995), pp. 156, and 528; Statistical Yearbook 1997. (GUS: Warsaw 1997), pp. 166 and 504; Statistical Yearbook 1999. (GUS: Warsaw, 1999), pp. 165 and 544.

According to the new system, pension benefits will come from three pillars. The first one is managed by the reformed Social Security Office (ZUS) where all insured person have their own accounts onto which their capital paid in the form of regular contributions is deposited. This pillar operates on a PAYG principle (Pay-As-You-Go) and a set contribution, and participation in this system is obligatory. Future benefits depend on the amount of cash deposited on the account and on the retirement date.

The second pillar is operated by privately managed institutions (universal pension societies-PTE) offering open pension funds (OFE), which receive a part of the contribution paid to ZUS. The task of open pension funds is to increase the dues collected in the most effective and secure manner. The amount of retirement pension payable from the second pillar will depend on the value of contributions paid and the financial results of the investment policy conducted by the OFEs. Participation in the second pillar scheme is obligatory.

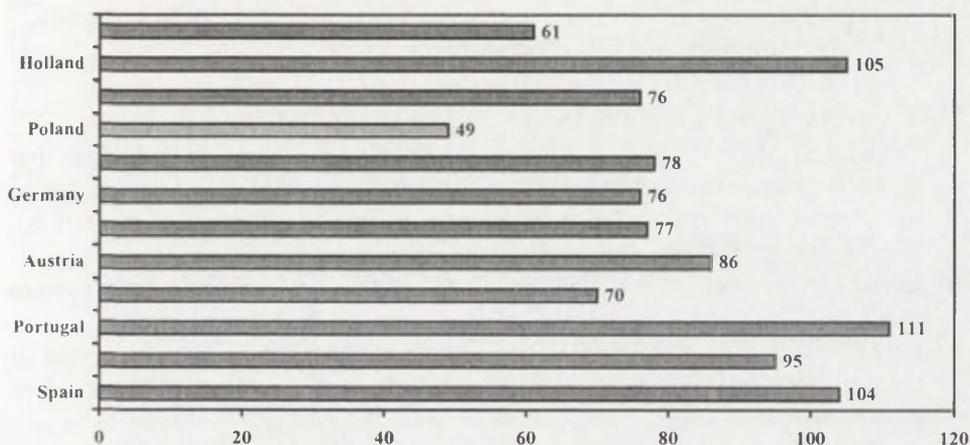
The third pillar refers to voluntary savings of supplementary means for the old age covering primarily occupational pension schemes as well as other form of individual and group savings and savings and insurance programs. The adopted solution allows for the establishment of a more flexible system which allows its participants to allocate part of income through the entire lifetime in line with one's own preferences.

The adopted solution, which restricts the repartition system and introduces the principle of a defined contribution and capital investments, made it possible to avoid contributing to the ever growing expenses of the system from

the budget and reducing state expenses on other social aims, and weakening the economy. The changes introduced also safeguarded the system against all kinds of risk (e.g. unemployment or economic recession) making it more immune to negative influences. In addition to that, the organisational and functional solutions that came with the new reform created participation opportunities to financial institutions operative on the domestic market (PTE owners, depositories, and parties to employee pension scheme agreements).

However, some concerns are raised as to the value of future benefits provided by the obligatory social security schemes with respect to the level of income before retirement, especially when compared with respective figures in the European Union (Figure 4)⁶.

Fig. 4. Net replacement ratio in selected member states of the European Union and in Poland (expressed as a percentage of the average net remuneration immediately before retirement)



Source: K. Majkowski: *Polski emeryt w Unii biedny czy bogaty*. *Gazeta Prawna* 2003, No. 43, p.14.

In keeping with the assumptions of the reformers of the Polish social security system, only prudence of individuals will actually increase the value of future retirement benefits by participating in the voluntary third pillar programs, i.e. employee pension schemes (so far only 218 such schemes have been

⁶ Cf.: Pension Replacement Rates. Projection of pension replacement rates in the new pension system. www.knuife.gov.pl/publikacje/emerytalny/raporty/stopazastapienia.html

established)⁷ and in other group or individual savings and savings and insurance schemes. Sustaining the level of subsistence from the period of economic activity will derive from insurance awareness and financial capacity of individuals rather than their participation in the obligatory pension schemes.

Comparing the level of retirement pensions in Poland and in the European Union, one should remember that the majority of member states – largely because of demographic changes (Table 1) – are already facing the need to reduce too high costs of pension-related expenses (Figure 5) and introducing relevant reforms depending on political, economic, and social conditions. Some of the measures undertaken include⁸:

1. Rationalising the existing system by maintaining flat rate contributions through the implementation of such solutions as:
 - increasing retirement age,
 - extending the period that constitutes the basis for calculating retirement benefits,
 - reducing state guarantees with respect to the level of benefit provision,
 - managing pension funds efficiently,
 - changing the principles of indexation,
 - reducing the level of benefits;
2. Implementing the principle of equivalence, i.e. observing the principle that determines the relation between benefit entitlements and value of benefits to the contribution made to the system (the principle of a defined contribution), combined with the rationalisation of the entire system;
3. Introducing partial capital funding of the system and reforming the system by rationalising and adopting the principle of a defined contribution;
4. Restricting the basic system to the provision of basic benefits calculated in relation with minimal income, and relying on well developed individual or group pension schemes.

Given the reforms that are now underway, social protection systems continue to change. These changes (as in the case of Poland) boil down to restricting the participation of the state in financing retirement benefits. This, however, is giving rise to social discontent and even unrest⁹. Nevertheless, such measures are inevitable when one takes a macroeconomic perspective.

⁷ Until 24 June 2003 The Social Security and Pension Funds Supervisory Board registered 218 employee pension schemes (Register of Employee Pension Schemes) www.knuife.gov.pl/ppe/rejestr/index.html#CCXVI.

⁸ Cf.: G. Abramovici. *Social protection: expenditure on pensions*. Eurostat - Statistic in focus 2003, Theme 3, No. 11, p. 6.

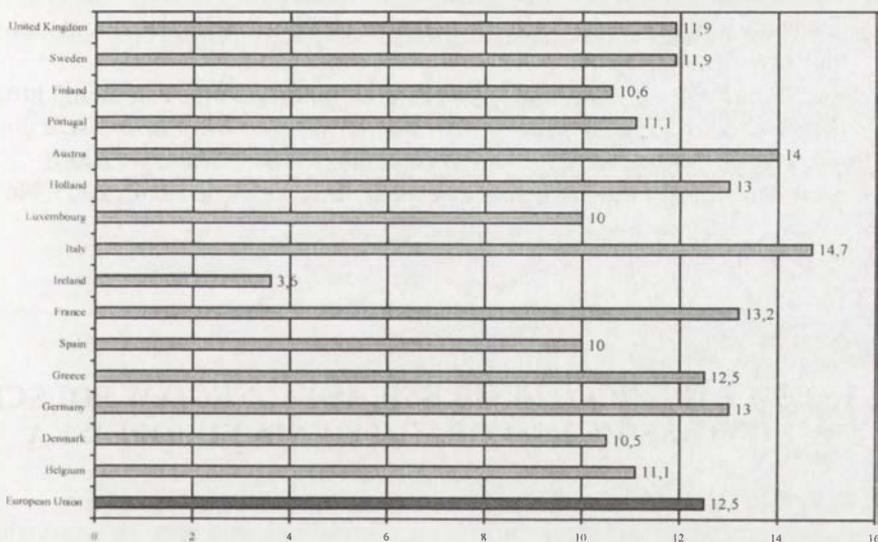
⁹ For instance recent protests in Austria and in France.

Table 1. Forecast of the demographic dependence indicator in the members states of the EU (in %)

Country	Year		
	2000	2005	2010
Belgium	40.2	40.1	43.4
Denmark	34.8	38.0	43.3
Germany	41.3	45.4	45.6
Greece	42.0	42.8	45.3
Spain	38.1	38.8	41.1
France	38.3	38.3	42.2
Ireland	27.9	27.8	30.8
Italy	42.5	45.2	49.6
Luxembourg	33.8	36.1	38.3
Holland	31.6	33.6	38.8
Austria	35.9	39.7	41.9
Portugal	38.8	37.3	39.5
Finland	35.8	37.9	46.2
Sweden	41.3	45.0	49.1
United Kingdom	37.6	38.1	41.4
European Union	39.2	40.9	43.9

Source: G. Abramovici. *Social protection: expenditure on pensions*. Eurostat - Statistic in focus 2003, Theme 3, No. 11, p. 7.

Fig. 5. Old-age and disability pension related expenses as a percentage of GNP in the UE in 2000.



Source: G. Abramovici. *Social protection: expenditure on pensions*. Eurostat - Statistic in focus 2003, Theme 3, No. 11, p. 3.

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Streszczenie

SYSTEM ZABEZPIECZENIA EMERYTALNEGO W POLSCE W KONTEKŚCIE INTEGRACJI Z UNIĄ EUROPEJSKĄ

Problematyka sposobu zorganizowania i funkcjonowania systemu emerytalnego w Polsce jest kwestią mało eksponowaną w dyskusjach dotyczących akcesji naszego kraju do Unii Europejskiej. Wynika to głównie z faktu, że w prawie zabezpieczenia członków Wspólnoty występują odrębności i istnieje duża różnorodność w tym zakresie.

Na gruncie przepisów wspólnotowych dotyczących koordynacji różnych systemów emerytalnych można mówić o dwóch rodzajach emerytur: - emeryturze krajowej, do której prawo istnieje na podstawie ustawodawstwa wewnętrznego w taki sposób, że nie jest konieczna procedura sumowania okresów ubezpieczenia lub zamieszkania; - emeryturze na podstawie przepisów unijnych, gdzie prawo do emerytury stanowi rezultat sumowania okresów ubezpieczenia lub zamieszkania.

Na tym tle nasuwają się wątpliwości, czy kierunek zmian systemu emerytalnego w naszym kraju był właściwy i czy zreformowany system zabezpieczy egzystencje przyszłym jego beneficjentom na poziomie porównywalnym do europejskiego.

Przyjęte rozwiązania polegające na ograniczeniu filara repartycyjnego i oparciu jego finansowania o zasadę zdefiniowanej składki, przy jednoczesnym wprowadzeniu elementu kapitałowego pozwoliły na uniknięcie konieczności ciągłego uzupełniania rosnących wydatków systemu środkami budżetowymi i ograniczania wydatków państwa na inne cele społeczne, a także osłabiania gospodarki. Zmiany te większym stopniu uodporniły system na różnego rodzaju ryzyka (np. bezrobocie, spadek koniunktury) czyniąc go bardziej bezpiecznym.

Dokonując porównań poziomu zabezpieczenia emerytalnego w Polsce z krajami Unii Europejskiej należy pamiętać, że większość z nich, głównie na skutek zmian demograficznych, stanęła już przed koniecznością ograniczania zbyt wysokich wydatków emerytalnych i wprowadza reformy stosownie do uwarunkowań politycznych, gospodarczych i społecznych.

The first part of the paper deals with the general principles of the theory of the evolution of the human mind. It is shown that the human mind is not a static entity, but a dynamic one, which is constantly evolving and developing. The author discusses the various factors which influence the evolution of the human mind, such as the environment, the social conditions, and the individual characteristics of the person. It is argued that the human mind is a product of the interaction of these various factors, and that it is therefore constantly changing and developing. The author also discusses the various methods which have been used to study the evolution of the human mind, and the results of these studies. It is shown that the human mind is a very complex and multifaceted entity, and that it is therefore difficult to study. However, the author believes that it is possible to gain a better understanding of the human mind by studying its evolution and development.

THE LUBLIN PROVINCE (LUBELSKIE) AS A REGION OF THE EUROPEAN UNION'S EASTERN BORDERLAND

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Introduction

Poland's accession to the European Union will make the eastern border of our country the outside border of the EU. This will change the geo-political significance of the Polish regions along the border. There arises a question about what has been done in order to prepare these areas for their new functions and what consequences for the regions' development the process of the eastward enlargement of the EU may entail. This paper will attempt to answer these questions on the basis of analyses of the Lublin province (Lubelskie).

Socioeconomic potential of the Lublin province

The starting point for the discussion is to identify the existing socioeconomic potential of the Lublin province. It has an area of 25,100 square kilometres which places it as third largest in the country (Table 1). As much as 68,3% of the area is arable land. A higher percentage of the arable land can be found only in the Łódź province. The Lublin province does not stand out among other regions however, as far as the number of forests, or areas of notable environmental importance, protected by law, are concerned.

An important factor in the development of the Lublin region is the fact that its eastern border is at the same time the country's border with Belarus and Ukraine. The total length of the border is 427 km, of which the Lublin-Belarus part measures 161 km (i.e. 38,7% of the total length of the Polish-Belarus border), and the Lublin-Ukraine part 266 km (i.e. 50,3% of the Polish-Ukraine border). The Bug River makes the entire border between Lublin province and Belarus, and 75,6% (201 km) of the Lublin-Ukraine border.

There are six road border crossings in the Lublin province (between Poland and Belarus: Kukuryki, Terespol and Sławatycze; between Poland and

Ukraine: Dorohusk, Zosin, Hrebenne) and four railway border crossings (between Poland and Belarus: Terespol; Poland and Ukraine: Dorohusk, Hrubieszów, Hrebenne). In 2002, 11802 people crossed these points, which was 6,2% of the total number of people crossing Polish borders.¹ The Kukuryki and Terespol road and railway crossings as well as the Sławatycze crossing service more than 60% of the Polish-Belarus border traffic, while the Dorohusk and Hrebenne road and railway crossings and the Zosin crossing – approximately 70% of the Polish-Ukraine border traffic. In spite of that, none of the motorways planned to be built in Poland is going to run through the Lublin province. It is possible that in a yet unspecified future dual carriageways: Warszawa – Lublin – Zamość – Hrebenne and Warszawa – Lublin – Chełm – Dorohusk might be built. Poor transportation accessibility of the Lublin province is further aggravated by a small number of bridges on the Vistula river (3 bridges in Dęblin, Puławy and Annopol on a 102 km stretch of the river) as well as lack of a passenger airport.

Table 1. The area of the Lublin province and the structure of its utilization as compared to the rest of the country

Province	Area in km ²	Arable lands (%)	Forest density (%)	Areas protected by law (%)
Dolnośląskie	19948	58,3	28,2	20,1
Kujawsko-Pomorskie	17970	64,7	22,4	31,1
Lubelskie	25114	68,3	22,0	22,7
Lubuskie	13984	39,6	48,1	36,1
Łódzkie	18219	68,8	20,4	16,3
Małopolskie	15144	58,3	28,4	58,0
Mazowieckie	35579	67,3	21,9	29,6
Opolskie	9412	61,6	26,2	27,1
Podkarpackie	17926	52,6	36,3	47,9
Podlaskie	20180	59,5	29,5	31,9
Pomorskie	18293	49,6	35,3	32,5
Śląskie	12294	50,3	31,7	22,1
Świętokrzyskie	11691	62,6	26,9	50,2
Warmińsko-Mazurskie	24203	53,9	29,5	53,6
Wielkopolskie	29826	63,4	25,2	31,3
Zachodniopomorskie	22902	48,6	34,3	20,2
POLAND	312685	58,9	28,4	32,5

Source: Classification prepared by the author on the basis of: Rocznik Statystyczny Województw 2001, GUS, Warszawa.

From a demographic point of view, the Lublin province can be classified as a big region of the NUTS-2 type. As far as the number of inhabitants is con-

¹ Border traffic and expenses of foreigners' in Poland and Poles abroad in 2002, GUS, Warszawa 2003.

cerned, it ranks seventh in the country. There is, however, net out-migration. It also has a falling birth rate (Table 2). The demographic load factor is also above the national average. Only 46,8% of the population lives in cities.

The demographic dimension does not exhaust the discussion of population as an element of the province's developmental potential. The figures in Table 3 provide the basis for an analysis of the socioeconomic dimension.

Table 2. The population of the Lublin province as compared to the rest of the country – the demographic aspect

Province	Population (in thousands)	Birth rate (‰)	Migration balance (‰)	Feminization factor	Demographic load factor
Dolnośląskie	2972,7	-0,7	-0,7	107	59
Kujawsko-Pomorskie	2099,7	0,8	-0,5	106	63
Lubelskie	2232,1	-0,1	-1,4	105	70
Lubuskie	1024,0	1,1	-0,6	105	61
Łódzkie	2643,4	-3,2	-0,5	109	63
Małopolskie	3233,8	2,0	+0,6	105	67
Mazowieckie	5072,3	-0,8	+1,8	108	65
Opolskie	1084,7	-0,0	-3,4	105	61
Podkarpackie	2128,6	2,5	-0,9	104	70
Podlaskie	1221,1	0,2	-1,3	104	71
Pomorskie	2198,3	2,4	+0,2	105	62
Śląskie	4847,6	-0,8	-2,5	106	58
Świętokrzyskie	1322,9	-0,6	-1,6	104	68
Warmińsko-Mazurskie	1468,3	2,6	-1,7	104	64
Wielkopolskie	3360,9	1,0	+0,4	106	63
Zachodniopomorskie	1733,8	1,1	-0,4	104	59
POLAND	38644,2	0,3	-0,5	106	63

Source: Classification prepared by the author on the basis of: Rocznik Statystyczny Województw 2001, GUS, Warszawa.

As the figures make clear, the employment factor in Lublin is higher than the country's average. It is also correlated to the rather low unemployment rate. The structure of the employed allows us to identify the functional types of professional activity. Using the criteria suggested by A. Kopias², one may claim that the Lublin province relies basically on agriculture and services, which makes it similar to such provinces as: Podlaskie, Podkarpackie and Świętokrzyskie.

² Cf.: A.Kopias, *Problemy metodyczne oraz wyniki badań nad typologią funkcji obszarów wiejskich*, Acta Universitatis Lodziensis - Folia Oeconomica, 46, 1985, pp. 73-81.

Table 3. The population of the Lublin province as compared to the rest of the country – the socioeconomic aspect

Province	Employment factor (%)	Employed in agriculture (% of all employed)	Employed in industry and construction (%)	Employed in services (%)	Unemployment rate (%)	Gross income per capita (zł)
Dolnośląskie	45,2	16,1	30,4	53,5	18,4	11268
Kujawsko-Pomorskie	46,4	26,3	28,6	45,1	19,2	10075
Lubelskie	51,5	52,0	15,2	32,8	14,0	8975
Lubuskie	41,6	17,9	29,3	52,8	21,3	10492
Łódzkie	47,4	32,5	26,7	40,8	16,3	10930
Małopolskie	50,5	35,9	22,7	41,4	12,2	10517
Mazowieckie	50,8	24,9	22,2	52,9	10,8	15652
Opolskie	47,5	28,5	28,2	43,3	15,7	8771
Podkarpackie	45,9	47,3	20,6	32,1	16,2	8771
Podlaskie	51,8	46,4	16,8	36,8	13,8	9505
Pomorskie	47,5	15,5	30,1	54,4	16,6	10810
Śląskie	42,0	12,2	37,7	50,1	12,9	12817
Świętokrzyskie	48,8	49,0	18,7	32,3	16,6	9571
Warmińsko-Mazurskie	41,9	26,6	26,1	47,3	25,8	8802
Wielkopolskie	49,9	25,9	29,9	44,2	12,5	11598
Zachodniopomorskie	44,8	15,5	27,7	56,8	20,8	11220
POLAND	47,4	28,5	26,0	45,5	15,1	11320

Source: see Table 1.

From the economic point of view, it is interesting to look at available income per capita, which is, on the one hand, the measure of society's well-being, and on the other, shows the most important factor of the market economy development which is the demand potential. As the figures in Table 3 make clear, available income per capita in the Lublin province is lower by 20,7% than the national average. This allows us to classify the Lublin region as an area of a low demand potential.

These figures correspond to information about synthetic measure of regional development which is gross national product (GNP) obtained in a region per head. Table 4 contains the appropriate data.

As the table shows, in 1998-2000 the Lublin province, together with Podkarpackie, Podlaskie and Warmińsko-Mazurskie provinces, had the lowest level of economic development. The regional variation is relatively small, however, being: 2,2 (Mazowieckie):1 (Lubelskie).

Table 4. Gross national product per capita in the Lublin province as compared to the rest of the country in 1998-2000.

Provinces	GNP per head:							
	1998		1999		2000		Average: 1998-2000	
	zł	rank	zł	rank	zł	rank	zł	rank
Dolnośląskie	14290	4	16273	4	18324	4	16296	4
Kujawsko-Pomorskie	13193	7	14121	10	15893	8	14402	8
Lubelskie	10383	16	11112	16	12146	16	11214	16
Lubuskie	13062	8	14444	8	15900	7	14469	7
Łódzkie	12682	10	14497	7	15723	10	14301	10
Małopolskie	13029	9	14231	9	15826	9	14362	9
Mazowieckie	20920	1	23760	1	26871	1	23850	1
Opolskie	12635	11	13320	11	15146	11	13700	11
Podkarpackie	10866	15	11685	14	12608	15	11719	15
Podlaskie	10926	14	11580	15	13174	14	11893	14
Pomorskie	14129	5	16120	5	17824	5	16024	5
Śląskie	16014	2	17565	2	19509	2	17696	2
Świętokrzyskie	11056	12	12435	12	13868	12	12453	12
Warmińsko-Mazurskie	10986	13	12341	13	13210	13	12179	13
Wielkopolskie	15141	3	16747	3	18900	3	16929	3
Zachodniopomorskie	13980	6	15924	6	17489	6	15798	6
Poland	14316	-	15914	-	17725	-	15985	-

Source: Classification prepared by the author on the basis of the GUS data.

Putting the figures from Table 4 – after converting them to euro using purchasing power parity – in relation to the fifteen EU states' average, it turns out that Mazowieckie province has 58,1% of the EU average, while the Lublin province - only 27,2%. Therefore, from the point of view of the economic potential of the EU regions (NUTS-2), all Polish regions may expect some aid from the EU Structural Funds³. After the accession of ten new countries to the EU, Polish provinces: Lubelskie, Podkarpackie, Podlaskie, Warmińsko-Mazurskie, Świętokrzyskie and Opolskie, together with Lithuania, Latvia and two Hungarian regions (Eszak-Alfold and Eszak-Magyarország) – will all belong to the group of ten poorest regions of the enlarged European Union.

Summing up this part of the discussion, one may conclude that the Lublin province is a peripheral region not only geographically, but also, and above all, economically. This is why, the expected financial help within the framework of both the pre-accession resources and Structural Funds and Cohesion Funds

³ Cf.: A.Behrens, *Regional Gross Domestic Product in Central European Candidate Countries*, „Statistics in Focus” No 2, 2000, p. 1-3, J.Bielecki, *Pomoc będzie coraz większa*, „Rzeczpospolita” nr 29, 2002, s. B1, and A.Miszczuk, M.Miszczuk, *Regional Differentiation of States belonging to the First Pre-accession Group for the European Union* [in:] J.Kitowski (ed.): *Spatial Dimension of Socio-economic Transformation Processes in Central and Eastern Europe on the turn of the 20th Century*, UMCS, Rzeszów 2001, p. 101-110.

should turn out to be much more effective in the Lublin region than in other, better developed areas.

Priorities of the European integration activities in the Lublin province

In line with the public administration reform which came into effect on January 1, the local government (self-government) of the province bears the main responsibility for the province's development. The most important tool of provinces' intra-regional policy is their development strategy, providing direction to the local government's activities. The experiences connected with developing this strategy in particular regions allow one to draw some conclusions. First of all, they are methodologically varied, and this concerns mainly the following⁴:

- strategy areas (strategy for the province's self-government or for the whole region, i.e. all the actors functioning in such an area),
- scope (only strategic goals and tasks but also routine activities),
- timelines (average period for regional "programming" in the EU or 10-15 years).

Secondly, relatively little emphasis is put on strategies or government priorities, while, at the same time, there exists a strong territorial lobbying. As consensus is hard to reach, this may lead to a lack of internal or external coherence.⁵

Thirdly, too little attention is paid to the system of goal implementation monitoring, task evaluation and coordination and using the potential of the existing regional development institution.

Applying these remarks to the Lublin province, one may observe that the strategy of its development, developed by the province's local government, covers the next 10-15 years. Its scope is much broader than the competencies of the province's local government, which proves that the inspiring function of the local authorities – rather than the executive function only – has been noticed. The strategy of Lublin province's development is, unfortunately, poorly coordinated with the strategies of the other provinces situated along the future EU eastern border. And it is exactly this cross border location, which is perceived as the main factor of regional development, as demonstrated by the main goal of the strategy: *to achieve sustainable social and economic development by*

⁴ G.Gorzela, B.Jałowicki 2001, *Strategie rozwoju regionalnego województw: próba oceny*, „Studia Regionalne i Lokalne” nr 1, pp. 41-59.

⁵ P.Żuber, *Teoria i praktyka opracowania strategii rozwoju województwa - prace nad strategiami rozwoju województw w świetle ankiety Ministerstwa Gospodarki*, „Studia Regionalne i Lokalne” nr 3, 2000, pp. 87-97.

using a region's geographic location as a platform for co-operation between Eastern and Western Europe.⁶ Some traces of coordination can be found only in road infrastructure and environment protection programmes.

The Strategy of the Lublin Province's Development includes 246 programmes. Among the more interesting are: the Lublin Science and Technology Park, the Polish-Ukrainian University, „Clean Bug,” a passenger airport in Niedźwiada near Lubartów, the development of road border crossings in Sławatycze, Dorohusk, Zosin and Hrebennie as well as building a new Polish-Ukrainian border crossing in Uśmierz-Waręż, building of a refinery on the basis of the Odessa-Brody-Gdańsk pipeline, building a gas power station in Lubartów and coal power station in Łęczna. One may wonder whether some of these projects are viable. This concerns, in particular, the building of the power station; the province has no power deficits and, besides, it is possible to import cheap energy from Belarus. Locating the passenger airport in a country commune (*gmina*) Niedźwiada 40 km from Lublin, instead of locating it in Lublin's neighbouring Świdniku is hardly rational, either.

The resources for implementing the *Strategy* may come from three sources. The first one of them, according to the *Bill of May 12, 2000, defining the rules of supporting regional development* (Dz.U. nr 48 poz. 550) is a contract between the local government and the government. In 2002, within the frame of the contract, 6,5 mln zł was spent in the Lublin province, 65,0% of which was spent on modernizing especially *powiat* and *commune* (*gmina*) roads, whereas the remaining 35,0% on purchasing medical equipment. In 2003 50,6 mln zł is to be spent, 98,5% of which will be spent on modernizing roads. The contract for the Lublin province does not include, unfortunately, important pro-development investments having a regional or cross-regional significance. Most of them have a clearly local character.

The second source of financing are budget resources of the province's local government. The situation of the Lublin province, with regard to its revenue and compared to the rest of Poland, is shown in Table 5. It shows a very small share of the province's own revenue in the gross revenue of the Lublin, which points to the province's strong dependence on the state budget. As far as capital expenditure is concerned (including investment expenditure) the Lublin province is also below the national average.

Interesting investment plans for 2003 include: building the Regional Fair and Exhibition Centre – 8,6 mln zł (in 2002 – 5 mln zł) and the Lublin Science and Technology Park – 6,5 mln zł. Design work for the airport in Niedźwiada is also to be continued (in 2002 – 8 mln, in 2003 – 3 mln).

⁶ *Strategia rozwoju województwa lubelskiego*, Urząd Marszałkowski, Lublin 2000, p. 98.

The third source of financing the programs are foreign resources, i.e. pre-accession funds, especially Phare. By 2004 the following projects will have been financed by this source, totalling 67,6 mln euro:

- further development of border crossings in Sławatycze, Kukuryki-Koroszczyn, Terespol and Dorohusk – 23,0 mln euro,
- human resource development and the development of the sector of small and medium enterprises – 15,4 mln euro,
- road modernization and building bypass roads – 10,1 mln euro,
- protection of the Bug river – 2,6 mln euro,
- restoration of Lublin's Old Town – 2,3 mln euro,
- cross-border cooperation within the Bug Euroregion – 0,1 mln euro.

Table. 5. Revenue and expenditure of the Lublin province's local government budget, as compared to the rest of the country.

Province	Revenue		Expenditure	
	Total in mln zł	Including own in %	Total in mln zł	Including capital in %
Dolnośląskie	353,9	14,2	350,2	32,4
Kujawsko-Pomorskie	180,7	15,1	192,6	13,8
Lubelskie	235,0	9,7	234,9	24,2
Lubuskie	147,0	9,8	148,5	25,5
Łódzkie	160,4	21,6	167,5	10,5
Małopolskie	272,3	15,9	277,8	31,3
Mazowieckie	397,0	30,6	406,6	20,9
Opolskie	93,7	12,7	93,8	16,5
Podkarpackie	198,7	13,6	201,0	17,1
Podlaskie	118,9	11,9	122,5	17,2
Pomorskie	185,7	18,0	212,5	24,8
Śląskie	603,5	15,0	608,9	56,8
Świętokrzyskie	189,4	7,3	189,0	52,9
Warmińsko-Mazurskie	122,5	13,6	137,1	11,7
Wielkopolskie	274,2	17,8	270,0	24,4
Zachodniopomorskie	171,7	12,9	174,5	13,8
POLAND	3704,6	15,9	3787,1	29,0

Source: see Table 1.

From the estimates of the European Integration Office, it seems that after Poland joins the EU, the Lublin province may expect financial aid from Structural Funds and Cohesion Funds amounting to 400-450 mln euro a year. It seems that in the first place these funds should be used to improve the province's transportation accessibility, namely the development and modernization of the road network, the building of an airport as well as the development of the existing border crossings and building new ones in Kodeń and Włodawa (be-

tween Poland and Belarus) and Dubienka, Korytnica, Kryłów, Uśmierz, Oserdów, Szczepiatyn and Ulików (between Poland and Ukraine).

The second area in which EU resources should be invested is social infrastructure. A very interesting project from this area is the Polish-Ukrainian university, which, so far, has only materialized into the European Collegium of Polish and Ukrainian Universities in Lublin. The large Lublin academic centre could successfully become a stimulus for the development of modern industry (science and technology park). It is necessary as well to step up activities within the Bug Euroregion. One of the areas of cooperation could be using the river Bug and cross-border areas of notable environmental importance, i.e. Polesie and Roztocze, for tourism.

It is worthwhile to emphasize, in the light of the European integration, numerous foreign contacts maintained by the Lublin province within the Bug Euroregion (with the following districts: Brest in Belarus, Lviv and Wolyn in Ukraine)⁷ and, beyond it, especially with Gelderland (the Netherlands)⁸, Lorraine (France), Sardinia and Umbria (Italy), the Hajdu-Bihar province (Hungary) and the Schwabian district of Baden (Germany). The local government is getting ready for the accession of the Lublin province to the Assembly of European Regions. The Bug Euroregion continues to be a member of the Association of European Border Regions.

Since 1999 there has existed in Brussels a joint information and promotion regional office of the Lubelskie and Podlaskie provinces. It is one of approximately 200 offices functioning there, 10 of which represent the candidate states and two of them – Poland (the other one is a representative of the Pomorskie Association of Country Gminas (Pomorskie Stowarzyszenie Gmin Wiejskich)).

It seems therefore that the expected eastward shift of the EU border has become a stimulus for many projects, which might have an impact on the development of the Lublin province and its future position in the EU. However, their successful implementation depends to a large extent on ensuring appropriate financing sources, coming both from the state and the EU.

⁷ For more information about the activity of the Bug Euroregion see: M. Bałtowski, A. Miszczuk, *Euroregion Bug – założenia i osiągnięcia* [w: A. Stasiak (red.): *Euroregiony wschodniego pogranicza – założenia i osiągnięcia*, WSE, Białystok 2002, p.203-218.

⁸ For more information about the cooperation between the Lublin province and Gelderland see: *International Co-operation of Regions as Manifestation of European Integration (on the example of the Gelderland and the land of Lublin)* [in:] J. Kitowski (ed.): *Eastern Border of European Integration Processes*, Institute of Geography and Spatial Organization PAS, The Maria Curie-Skłodowska University, Rzeszów 2000, p.773-781.

Conclusion

Poland's integration with the EU offers a unique chance for development for both geographically and economically peripheral regions, one of which is the Lublin region. In order to take full advantage of this chance, it is necessary to prepare projects meeting, on the one hand, the needs and, on the other hand - the requirements set by the European Commission. One of these requirements is respecting the addition rule, which means that the beneficiary has to contribute his own input⁹. The existing financial system of the province's local government does not meet such requirements. *The Bill of the Revenue of Territorial Self-Government Units (Ustawa o dochodach jednostek samorządu terytorialnego)* is of a temporary character and though initially planned to be effective only for the 1999-2000 period, it has since been prolonged 3 times, currently until 2003. It is necessary therefore to introduce urgent changes that would lead to both increasing the amount of resources available to local governments and the freedom of local governments in administering such resources. Without such changes it may turn out that Poland's and its regions' ability to absorb EU resources is incomparably lower than its potential possibilities and chances for development will be in most cases lost

Streszczenie

LUBELSZCZYŻNA JAKO REGION WSCHODNIEGO POGRANICZA UNII EUROPEJSKIEJ

Lubelszczyzna, należy do tych regionów, których znaczenie geopolityczne ulegnie zmianie na skutek naszej akcesji do Unii Europejskiej. Stanie się ona obszarem przygranicznym, związanym z zewnętrzną granicą UE. Dotychczasowy jej rozwój spowodował, że ma ona wiele cech regionu peryferyjnego, zarówno z punktu widzenia geograficzno-komunikacyjnego (brak autostrad, dróg ekspresowych i lotniska pasażerskiego, niewystarczająca liczba przejść granicznych z Ukrainą i Białorusią) jak i ekonomicznego (najbiedniejszy region Polski, ale także poszerzonej Unii Europejskiej).

Integracja Polski z Unią Europejską staje się niepowtarzalną szansą rozwojową dla tego typu regionów, do jakich należy województwo lubelskie. Może ono oczekiwać na wsparcie finansowe rządu 400-450 mln euro rocznie z Funduszy Strukturalnych i Funduszu Spójności. By je efektywnie wykorzystać konieczne jest przygotowanie

⁹ For more about the EU's cross-regional policy see: I.Pietrzyk, *Polityka regionalna Unii Europejskiej i regiony w państwach członkowskich*, PWN, Warszawa, 2000, s.153-194.

projektów, adekwatnych z jednej strony do potrzeb regionu, a z drugiej - spełniających wymogi stawiane przez Komisję Europejską. Jednym z tych wymogów jest respektowanie zasady dodawalności, co oznacza konieczność wnoszenia wkładu własnego przez beneficjentów. Dotychczasowy system finansów samorządu nie pozwala na to, ze względu na szczupłość środków i brak swobody dysponowania nimi. Bez zmian w tym zakresie może się okazać, że zdolności absorpcyjne Polski i jej regionów są bez porównania niższe w stosunku do potencjalnych możliwości, a szanse rozwojowe pozostaną w większości niewykorzystane.

THE TRANSPORTATION SERVICES MARKET OF POLAND AND UKRAINE IN THE ASPECT OF INTEGRATIVE PROCESSES

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The uniting Europe needs a good-working transportation system which so far has many challenges ahead. The Europe is a continent with one of the heaviest international transport due to the high level of economic development and economic activity of its inhabitants and also due to not that big average territory of its individual countries. It is also a continent of relatively tight transportation net. Nevertheless its transportation activities are irregular, which causes some consequences in economy. It can be predicted that the activity in economy will gradually move towards the Middle and East Europe countries. So performing the following assignments seems to be the most essential challenge:

- the connection of the main transportation channels of Europe
- the development of space connections in a foreign trade
- the adaptation of many various transportation systems.

It needs to be emphasized that the physical connection of main transportation channels seems not to be uniform, especially in points where the different countries' transportation nets meet like railway border crossing-points. Of less importance are also the differences in technical standards and the quality of transportation services offered to a user. However the different ways and effectiveness in building, maintaining, and ability to repair and modernize the transportation infrastructure are also substantial.

The existing space connections show the lack of well formed economic relationships between countries which already form the European Union and the

ones which are running for participation. Situation like this is observed in the area where the functioning of companies is regulated within the market economy system. It is mainly about the introduction of stable concept of economical and commercial policy and making it adopted by companies according to clear, uniform and stable principles.

The adaptation of varied transportation systems obliges to perform the uniform transportation policy in the area of the Commonwealth. The process of adaptation influences the structure and dynamic of the international trade exchange. The working out of the uniform net structure of the European international transportation connections seems to be the key work for the cooperation abilities already worked out between the Europe 'organized' which is the European Union and the Europe 'not organized' which is the rest of our continent still being in an organizational process.

The Polish market of the international transportation services successfully participates in a uniform transportation market which is the strategy market for most of Polish transportation entities. The structure and dynamic of the international trade exchange which has been created in the Polish foreign trade after the 1990 year clearly regulates the arrangement of transportation relationships between the Polish transportation market and the other ones.

The transit location of Poland, its population and economic activity especially the amount of the foreign trade exchange determine the distribution in transportation channels. Analyzing the burdening of Polish state borders data in 2002 we can notice that over a half of all foreign transports to and from our country goes via Poland-Germany state border (61% of cargo and 52% of passengers.)

Table 1. Charging structure borders of Poland in 2002 (%)

Border	Cargos	Passengers
polish - slovakian	8	8
polish - czech	12	29
polish - german	61	52
polish - russian	1	2
polish - lithuanian	8	1
polish - byelorussian	6	4
polish - ukrainian	5	4
amount	100	100

Source: Scientific description by the author on the grounds of <http://www.ue.psm.pl>

As you can see from the above presentation the Polish-Ukrainian state border is burdened in a minimal range. The basic transportation channel with 90 % of movements between Poland and Ukraine is III pan European corridor.

It is made of the E-40 highway and the railway track E-30, which runs from Zgorzelec (the check-point) via Legnica, Wrocław, Opole, Kraków,

Tarnów, Rzeszów, Przemyśl to Medyka (the check-point) and goes on on the territory of Ukraine to Lwów, Kijów, Charków. We might suspect that situation will change radically when Poland enters the EU, because the polish borderline becomes the outer border of the integrated group. We can propose a thesis that there will be liveliness in the transportation market of Poland and Ukraine when Poland enters the UE due to the increase in trade exchange with the member countries of the EU.

The 2 table presents the dynamic of polish foreign trade turnover in 2002. Among the main commercial partners of Poland the biggest dynamic in turnover can be seen in our exportation to Sweden, France, Russia, Belgium, Great Britain and Ukraine.

Table 2. The dynamic of polish foreign trade turnover in 2002 (according to the biggest commercial partners).

specification	Trade turnover /in mill. zł/	Trade turnover /w mill. USD/	Trade turnover in 2001 = 100 in zł	Trade structure in % 2002
Export				
1 Germany	54070,6	13248,4	106,1	32,3
2 France	10090,5	2473,0	125,9	6,0
3 Italy	9194,7	2256,4	115,3	5,5
4 Great Britain	8683,3	2126,3	117,7	5,2
5 Holland	7510,1	1841,3	107,2	4,5
6 Czech Republic	6692,5	1639,9	113,9	4,0
7 Russia	5436,1	1331,8	125,1	3,2
8 Belgium	5425,1	1329,7	118,8	3,2
9 Sweden	5410,6	1328,6	133,7	3,2
10 Ukraine	4816,8	1180,5	117,1	2,9
Import				
1 Germany	54691,7	13402,4	110,6	24,3
2 Italy	18811,5	4613,1	110,6	8,4
3 Russia	17978,5	4407,4	98,8	8,0
4 France	15662,7	3840,7	111,6	7,0
5 Great Britain	8746,2	2142,1	102,0	3,9
6 China	8473,0	2077,5	127,4	3,8
7 Holland	7891,5	1934,6	107,8	3,5
8 United States of America	7320,6	1795,2	105,7	3,3
9 Czech Republic	7296,1	1787,8	102,3	3,2
10 Belgim	6241,8	1529,1	111,2	2,8

Source: Scientific description by the author on the grounds of GUS 2002.

The strength of the economical development of the EU which is directed towards the middle and eastern areas of Europe should lead to the increase of the level of economy of Poland, Czech Republic, Slovakia, Hungary, and parallelly to the increase in trade exchange inside the UE and its neighboring

countries including Ukraine, which should increase the performance of transportation services.

A very dynamic increase in export has lately been observed in Ukraine. The participation of the EU countries in the commercial turnover with Ukraine is 20.53%. Between 1994 and 2002 the amount of Ukrainian export to the EU increased from 7% to 19.2%.

The biggest share in the total amount of Ukrainian goods exported have: Germany 6.1% (increase in export 1.8 times higher comparing to I quarter of 2002), Italy 5.8% (increase is almost 50%). There can also be seen an increased export to Austria (1.9 higher), Belgium (1.6), Denmark (1.9), Luxembourg (5.5), Holland 47%, Great Britain 18.9%, France 11.8% comparing to the same period of time last year. Among all the other Ukrainian exporters are: China 5.5% of the total amount of the exported goods, Hungary 3.6%, Poland 3.4% and Turkey 3.7%.

In the structure of polish foreign trade the exchange with Ukraine becomes more and more important. The table 3 shows the dynamic of polish-ukrainian exchange in the last few years.

Table 3. The dynamic of polish - ukrainian trade exchange in the years 1992-2000

Year	Export		Import		Trade turnovers		Balance
	mll. USD	Dynamic	mll. USD	Dynamic	mll.USD	Dynamic	
1992	161,6	100,0	123,8	100,0	275,4	100,0	37,8
1993	187,5	116,0	201,1	162,4	388,6	141,1	71,5
1994	280,4	149,5	204,9	101,9	485,3	124,9	75,5
1995	742,6	264,8	290,8	141,9	1033,4	212,9	451,8
1996	977,8	131,6	418,5	144,3	1396,3	135,2	559,3
1997	1206,8	123,4	415,5	99,3	1622,3	116,2	791,3
1998	1086,4	89,9	377,2	90,8	1462,3	90,1	+709,2
1999	702,2	64,6	338,4	89,7	1040,6	71,1	+363,8
2000	798,2	113,5	475,4	140,4	1273,6	122,4	+332,8

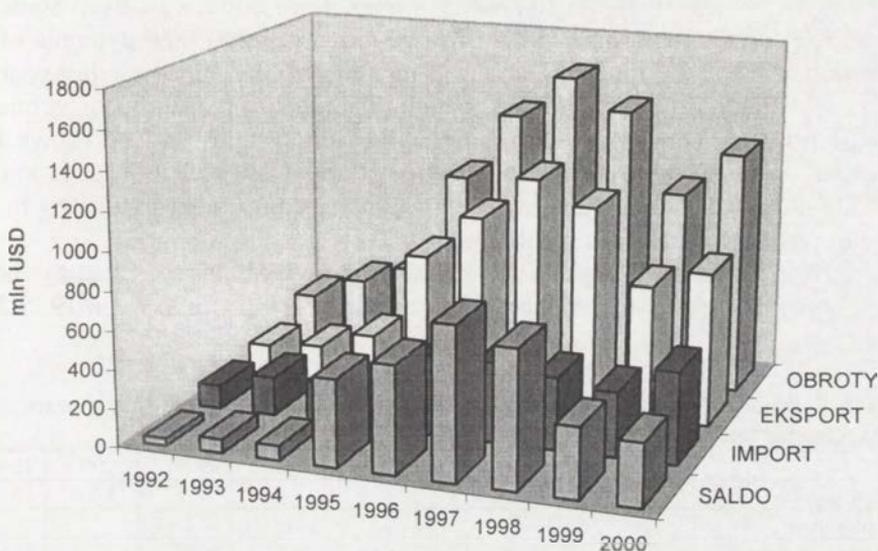
Source: Data from Ministry of Economy

The analysis of structure and dynamic of the trade exchange between Poland and Ukraine makes us sure that the assumptions about the development tendencies in the transportation markets of Poland and Ukraine are fairly correct. The increase in the neighboring commercial exchange started in 2000 still lasts. The highest increase in the Polish export was noticed in the field of transporting coal, electromechanical industry products and light industry. On the other hand the increase in import from Ukraine applied to most of the commodity groups mainly: stone, plaster and cement. According to data concerning the last three months of 2003 the dynamic of polish export was 112.5% and import 63.3% in comparison with the same time last year. Still Ukraine has been the outlet for Poland and occupied relatively 21st position in import and 18th in

export. As a result of the increase in the turnover both Polish and Ukrainian the situation has positively changed. In the international trade exchange, according to data about I quarter of 2003, Ukraine occupies 10 position in export and 17 in import.

The bar chart 1 shows the dynamic of the turnover between Poland and Ukraine in the years 1992-2000.

Bar chart. 1. The dynamic of international trade between Poland and Ukraine in the years 1992-2000 (in mill. USD)



Source: Scientific description by the author.

The structure of Polish export to Ukraine has been scattered so far. The main position has been occupied by the chemical industry goods (21%) including chemical industry products 10.95 and plastic, rubber 10.1%. The food and agriculture products made 15.4% of Polish export to Ukraine including vegetable products 5.4%, ready-made groceries, beverages and tobacco goods 8.5%. The light industry products made 14.2% of export including textiles 7.1% and footwear 6.5%. The electromechanical products made 15.3% including machines, appliances and electrical equipment 11.2%. Furniture and lighting made 8.8% of export to Ukraine. The increase of export to Ukraine since 2000 has been noticed in all the commodity groups but the food and agriculture products.

The biggest dynamic of the increase in the trade turnovers has been noticed in the range of mineral products (nearly tripled increase in coal transportation), the electromechanical industry products (+44%) and light industry (+34%). The biggest share in the value of polish export to Ukraine had furniture 52mln USD, coal 41mln USD, footwear 32 mln USD and also coffee, cosmetics and hygienic articles.

The increase in import from Ukraine concerned most of the commodity groups, but mainly mineral products (+84%), the stone, plaster and cement products (+67%). The most important items in the value of polish import are represented by: iron ore 129mln USD, natural gas 80 mln USD, crude oil 18 mln USD, casein 16 mln USD, and? timber, ferro-alloy, cast-iron, steel and aluminum scrap. According to data from I quarter in 2003 the dynamic of export was 112.5% and import 69.3% in comparison to the same time last year.

To picturesque the abilities of joining Ukraine to the European economic area synthetic characteristics of its transportation systems will be shown later on. The length of the transportation net of Ukraine is 190.2 thousands km. including almost 23 thousands km of railways, hard pavement roads 164 th. km and the country waterways 3.2 th. km.

The Ukrainian transportation market can be best characterized by the indicators of transportation labour and its structure performed between 1985-2000 (table 4, 5, 6).

Table 4. Transport according to different kinds of transport in Ukraine in the years 1985-2000 (in mill tons)

	1985	1990	1995	1996	1997	1998	1999	2000
Transport	6118	6286	2456	1865	1847	1675	1540	1531
including								
Land transport	6005	6167	2422	1843	1828	1657	1525	1516
Railway transport	1024	974	360	343	341	335	335	357
Car transport	4727	4897	1816	1254	1250	1081	955	939
Pipeline transport	254	296	246	246	237	241	235	220
River transport	113	119	34	22	19	18	15	15
Sea transport	56	53	21	14	10	9	7	6,3
Inland transport	57	66	13	8	9	9	8	8,3
Air transport	0,3	0,2	0,0	0,0	0,0	0,0	0,0	0,0

Source: Scientific description by the author on the grounds of <http://www.upcfc.org/upcfc/public>

The dynamic of transportation labour between 1985-2000 shows the significant decrease of the given indicator, reaching over 75% in the land transport. The strongest stability of the transportation labour was shown by the pipeline transport: 22% decrease in the amount of transportation.

Table 5 shows the structural division of transportation labour in the transport of Ukraine.

Table 5. The structural division of transportation labour in the transport of Ukraine in the years 1985-2000 (%)

	1985	1990	1995	1996	1997	1998	1999	2000
Transport	100	100	100	100	100	100	100	100
including								
Land transport	98	98	98	99	99	99	99	99
Railway transport	17	15	14	19	18	20	22	23
Car transport	77	78	74	67	68	65	62	61
Pipeline transport	4	5	10	13	13	14	15	15
River transport	2	2	2	1	1	1	1	1
Sea transport	1	1	1	1	1	0	0	0
Inland transport	1	1	1	0	0	1	1	1

Source: Scientific description by the author on the grounds of
<http://www.upcfc.org/upcfc/public>

On the transportation market of Ukraine the biggest share in the transport of products belongs to the land carriers: car transport and railway one; whereas the sea transport, river one and inland one are not so often in use.

Table 6 gives information of Ukrainian different means of transport carriage labour

Table 6. Transport in Ukraine according to different means of transport

	1985	1990	1995	1996	1997	1998	1999	2000
Transport	985,6	1039,3	544,0	450,3	402,4	391,7	388,0	394,1
including								
Land transport	724,9	761,7	415,2	382,0	365,7	366,4	368,3	379,6
Railway transport	497,9	474,0	195,8	163,4	160,4	158,7	156,3	172,8
Car transport	71,8	79,7	34,5	22,2	20,5	18,3	18,2	19,3
Pipeline transport	155,2	208,0	184,9	196,4	184,8	189,4	193,8	187,5
River transport	260,5	277,5	128,8	68,3	36,7	25,3	19,7	14,5
Sea transport	248,3	265,6	123,1	62,4	31,2	19,5	14,1	8,6
Inland transport	12,2	11,9	5,7	5,9	5,5	5,8	5,6	5,9

Source: Scientific description by the author on the grounds of Źródło: <http://www.upcfc.org/upcfc/public>

What we can see from the table is that the significant decrease of the carriage labour dates from 1990 and no mean of transport has managed to return to former condition but the pipeline one, which seems to be quite stable.

In Ukraine the length of exploitive rail of the general use was 22.7 th. km. in 1999 and the denseness of the rail net is 38 km. for 1 th. Km. Ukraine has almost 270 th. of freight cars, when there is need for 220 th. of them. On the other hand there is lack of passengers cars, diesel engines and electric locomotives. The rail in Ukraine is divided into: South-West (with the headquarters in Kijew), Donieck (headquarters in Donieck), Przydnirowska (h. in Dniepropietrowsk), South (h. Charków), Lvovian (h. Lvov), and of Odessa (h. Odessa).

The best developed railway net is in Donbass and at Dniepr. The main lines help to communicate Donbas (coal and metallurgical complex) with Przydniepr, abundant in iron and manganese deposits. The above main lines constitute the core of the regional rail net.

The most important main lines are in the western part of Ukraine (they are of international importance) and their names are Moscow-Kijev-Lvov-Czop, Moscow-Kijev-Zmerynka-Odessa, Kijev- Zmerynka-Odessa, Kijev-Minsk, Kijev-Charkov. What is worth noticing is the fact that the Czopsko-Batewski reloading complex has been built, and the rail-sea ferry crossing Iljiczewsk-Warna(Bulgaria) 435 km. long has been started.

Some important international and country road tracks are going through the Ukrainian territory, e.g.; Moscow-Kijev, Moskow-Charkov-Symferopol, Odessa-Kijev-Sankt Petersburg, Kijev-Dniepropietrowsk-Donieck etc. The territorial structure of a car transport is mainly made by city centers and important road junctions with modern railway stations in Kijev, Charkov, Zaporoz, Lvov, Dniepropietrowsk, Żytomierz, Tarnopol and Poltawa.

The sea transport concentrates only on the south of Ukraine, around the Black Sea and the Sea of Azov. Ukraine has 31 seaports which are combined into 3 sea institutes: Czarnomorski, Azowski and Ukrainsko-Dunajski. The following seaports are the part of the Black Sea Institute: Odessa, Iljiczewsk, South, Bilograd-Dniestrowski, Mikolajov, Oczakov, Cherson, Skadowsk, Eupatoria and Theodosia. Mariupol, Berdansk and Kercz are the Azovian Sea Institute and Izmail, Kilijaand, Reni belong to the Ukrainsko-Dunajski Sea Institute. Ukraine has also two sea ferry crossings: ukrainian-bulgarian (Iljiczewsk-Warna) and ukrainian-russian (Kercz-Taman).

The Ukrainian river transport carries goods and passengers by the country water routes. The length of the exploitive water routes of the general use has 1.5 times decreased in the last 10 years and is now 3.2 th.km. The river transport has been organized into the state-owned enterprise "Ukrriozflot", which has transferred into public limited company with the main enterprise as its part and 290 structural units. Kijev, Dniepropietrowsk, Dnieprodzierzyńsk, Zaporoz, Cherson Czerkasy, Krzemienczuk and Mikolajev are the biggest and the most mechanized river harbours. The river transport carries goods through the waters of Dniepr, the Danube, Black Sea, and Mediterranean Sea to the destination harbours in Romania, Germany, Hungary, Austria, Turkey, Greece, Israel, France and Italy.

The gas pipe "Przyjaźń" and Urenhoj-Pomary- Użhorod are going through the territory of Ukraine, and also the transcontinental oil main lines "Przyjaźń", the pipeline "Centre-West", the pipeline with oil-derived products from the refinery in Krzemienczuk-Lubnie-Kijev, Krzemienczuk-Kirowograd-Czerkasy, Łysyczańsk-Niżniodnieprowsk and other. The oil pipeline South Port

– Brody (670 km long) was also built. The length of the pipelines of the general use was 43 th. km at the beginning of 1999.

The air transport is organized into “Avialines of Ukraine” to which 27 hangars, 105 airports and companies repairing the air equipment belong. In comparison with the other means of transport the air transportation is season-dependent, which means that it becomes more frequent from April to August. The average distance of the air transportation is more than 1 th.km.long. The air ways connect Kiev with countries of the Western Europe and the East. The most popular destinations are the airports in Deusseldorf, Frankfurt, Vienna, London,

Tel Awiw. The biggest airports in Ukraine are Kijev (Boryspil), Charkov, Donieck, Dnipropietrowsk, Odessa, Winnica, Lvov, Lagansk, Zaporoz, Symferopol, Czerniowice, Cherson, Mikolajev, Iwanowo-Frankowsk.

Between 1990 and 1999 the number of all of the means of transport services decreased 4.2 times, and the number of passenger carriage 1.9 times. As far as the rail transport is concerned the renovation rate of the rolling stock has decreased 10 times, and the level of usage went critical (59%). Due to the obsolete vessels in the sea transport (20 years old on average) the Ukrainian fleet has lost its reputation. Following this result it has been forbidden for the Ukrainian vessels to enter many seaports in the world.

Speaking of the car transport and especially of large and very large carrying capacity trucks the renovation processes have been stopped. The number of roads and their technical condition does not fulfill the country’s need. The first and second class roads constitute barely 9.2% of all the roads, of which only 2095 km. are built according to the correct parameters of the first class road. The highways (not to mention the Kiev - Borysipl one) do not exist. According to the technical standards the annual renovation of 37.6 th. km of roads and building min. 400 km. of new ones is necessary to maintain the existing number of road nets.

In the air transport 224 (26%) airplanes among 859 are in operation in the state air companies, their average wear is 70%. The poor reputation and completely exploited airplanes are the reason for which the Ukrainian airlines became not competitive.

In the general range of services, transportation services made 85% in 1999. Nowadays when Ukraine already has the system of transit channels, its main task is to use them more often. More than 67% of transit through the Ukrainian territory falls to pipeline transport of gas, oil and oil-derived products. The second mean of transport of great importance is the rail one – 25 %. The basic transit routes spread in two directions:

– On a straight line (between the west and north-east border), by railway and cars – 54.3%

- Between the points along the north, east and partially west border, and in the seaports: 45.7%

Almost 95% of transit goes through the rail borders. The main cargo constitute goods exported by Russia, Belarus, Kazakhstan (iron ore 36%, hard coal 16%, oil-derived products 10%) to the destination in Slovakia, Hungary, Austria, Czech Republic, Romania and other. The car transit is mainly made towards the western part of Ukraine: Russia, Belarus, the seaports of Ukraine – Rostow - Caucasus, Moldavia-Russia and other.

In a plan about the economical integration with the EU Ukraine joined number of the international conventions and versatile contracts concerning transportation. The Ukrainian Ministry of Transport prepared and introduced all the documents connected with the process of entering the European Contract about the international road transportation of the dangerous cargo. To create a stable transportation route from Europe to Asia via Ukraine, Georgia and Azerbaijan the governments of these countries have signed the tripartite agreement concerning the building and operating of the international Eurasian transporting channel Iljiczewsk-Poti-Tbilisi-Baku. According to this agreement the Iljiczewsk-Poti car ferry crossing has been started and since 1998 the rail one named Iljiczewsk - Batumi. In April 1999 the governments of Ukraine, Bulgaria and Georgia have signed the documents about the mutual use of rail ferry crossing between Warna, Poti, Batumi and Iljiczewsk. Since then the regular transport takes place. In September 1998 12 countries including Ukraine have signed in Baku the "Primary multilateral agreement concerning the international transportation about the development of the channel Europe-Caucasus-Asia". In December 1999 the Memorandum has been signed in Warsaw concerning the creation of Ukrainian-polish transporting channel Baltic Sea- Black Sea (Gdansk/Gdynia-Odessa/Iljiczewsk). In April 2003 the channel for various means of transport between Ukraine (Kiev) and Poland (Slawkow) has been opened to carry containers and car sets by the broad gauge LHS. Nowadays the goods from the Far East (10 mln of containers a year) are transported by the sea. The voyage from the Russian Vladivostok to Hamburg lasts 45 days. However transportation of the same goods by trans-Syberian railway and then via Ukraine and Poland can be three times shorter. For the relations East-West this is the fastest and the cheapest solution.

The experimental railway from Lvov to Przemysl via Mosciska, with no stops on the border will be opened in May. As for today the trains loose 4 hours each time on the border for the change of wheels, because the wagons must be adopted from the Ukrainian railroads to polish standards. A system of a polish authorship called 'automatically separated wheels' (SUW) will help cross the border without stopping the train. We should believe that thanks to this invention the biggest barrier, which has been limiting for hundred of years the devel-

opment of transport between West and East and the development of the trade exchange simply disappears.

Streszczenie

RYNEK USŁUG TRANSPORTOWYCH POLSKI I UKRAINY W ASPEKTCIE PROCESÓW INTEGRACYJNYCH

Artykuł prezentuje zagadnienia współpracy i rozwoju rynku transportowego Polski oraz Ukrainy w perspektywie integracji z Unią Europejską. Tezą opracowania jest stwierdzenie, że na rynku transportowym Polski i Ukrainy, po akcesji naszego kraju do Unii Europejskiej, nastąpi jego ożywienie ze względu na wzrost wymiany handlowej, głównie, pomiędzy Polską i Ukrainą a pozostałymi krajami Unii Europejskiej.

Adaptacja zróżnicowanych systemów transportowych wymaga realizacji spójnej polityki transportowej na obszarze Unii Europejskiej. Proces adaptacji systemów transportowych obliguje strukturę i dynamikę międzynarodowej wymiany handlowej. Wypracowanie jednolitego układu sieciowego międzynarodowych połączeń transportowych Unii Europejskiej wydaje się być najistotniejszym wyzwaniem dla wypracowanych już możliwości współpracy i znacznie bardziej swobodnego współdziałania pomiędzy Europą „zorganizowaną” czyli Unią Europejską a Europą jeszcze „nie zorganizowaną”, ale powoli organizującą się, czyli pozostałą częścią naszego kontynentu.

Polski rynek międzynarodowych usług transportowych od dawna z powodzeniem uczestniczy w rynku transportowym Unii Europejskiej. Rynek transportowy Unii Europejskiej jest dla przeważającej grupy polskich podmiotów transportowych rynkiem strategicznym. Struktura i dynamika międzynarodowej wymiany handlowej jaka ukształtowała się w polskim handlu zagranicznym po 1990 roku wyraźnie określa rozkład relacji transportowych pomiędzy polskim rynkiem transportowym a pozostałymi rynkami. Położenie tranzytowe naszego kraju, rozmieszczenie ludności i jej aktywność gospodarcza, a szczególnie wielkość wymiany handlu zagranicznego obligują rozkład ruchu w kanałach transportowych szczególnie w relacji Wschód – Zachód.

DEVELOPMENT OF RAILWAY NETWORK IN MODERN CHINA

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Rapid economic growth in China in last decades was followed by adjacent high rates of railway network expansion as well. If these rates keep during next decade, the size of Chinese railway network would take the second place in the world after the U.S.A. (see table 1).

Table 1. The length of railway networks of biggest countries

<i>Country</i>	<i>Length of network, 1000 km</i>	<i>Country</i>	<i>Length of network, 1000 km</i>
U.S.A.	225,7	Mexico	31,0
Russia	149,0*	Brazil	30,5
China	70,0 (119)*	Japan	23,7
India	62,9	Poland	23,4
Germany	40,8	Ukraine	23,4
Canada	36,1	South Africa	21,4
Australia	33,8	Italy	19,4
Argentina	33,7	U.K.	16,9
France	31,9	Kazakhstan	14,4

*total mileage of all sorts of railways are indicated, including industrial, local and forest ones

China had 120.000 km railway totally in 2000, including 18.000 km of local, 11.000 km of forest and 20.000 km of industrial railways and the rest – state railways. The state railway mileage was increased in 1987-2002 by 33% (see table 2). 20.990 km of 67.400 km of state railways had double tracks (see below) and 13.600 km were electrified (20,5%) in 1999.

Table 2. The length of state railways of China in 1911-2002.

<i>year</i>	<i>Length, km</i>	<i>Year</i>	<i>Length, km</i>
1911	9.565	1980	49.900
1931	14.802	1985	52.100
1935	15.725	1987	52.600
1945	25.446	1990	53.378
1949	21.810	1994	53.991
1950	21.740	1995	62.615
1953	22.676	1997	66.000
1957	29.862	1998	66.400
1958	31.193	1999	67.400
1969	39.311	2000	67.500
1971	40.121	2002	70.000
1975	46.000	2005 (plan)	75.000

Dynamics of spatial structure of the network

Drastic changes took place not only with mileage, but the topological structure of the network during 1988-2002 as well. The highest level of disconnection was a main feature of the Chinese railway network at the initial stage of growth: 23 isolated systems appeared in the different parts of the country between 1881 and 1943, and their consolidation was finished by 1937-39. Last isolated lines in Sichuan and Yunnan provinces were joined to main network in 1956 and 1965 respectively.

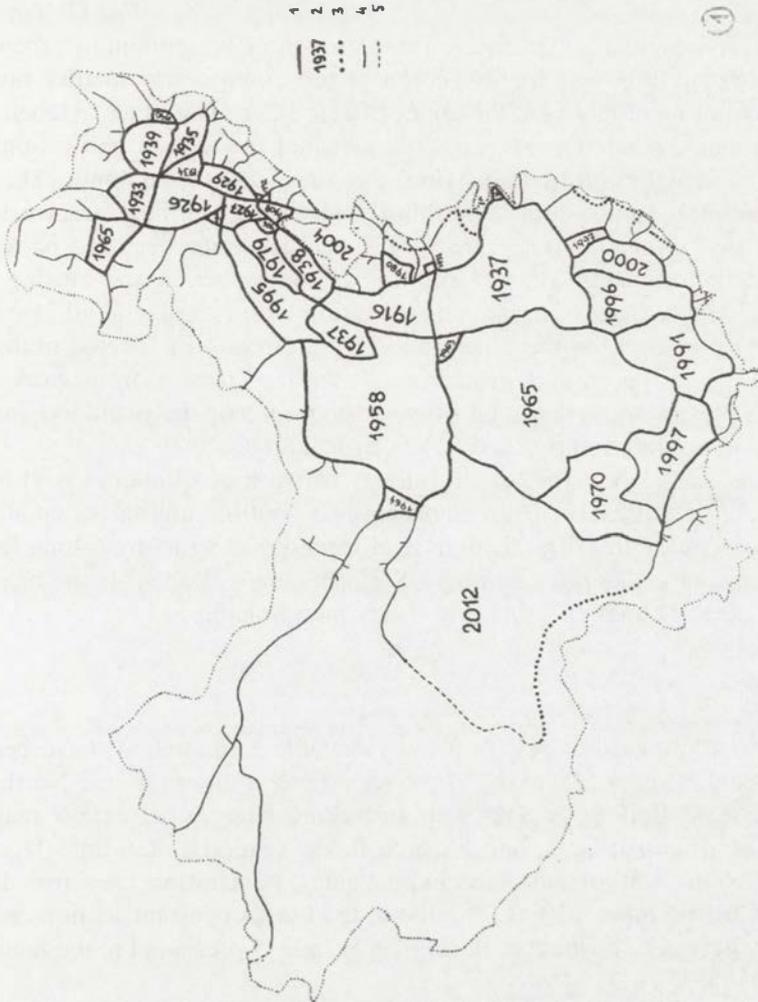
The first circuit (closed ring of lines) in the network has been formed in 1908 (the first railway was opened in China in 1876) on the south of Manchuria, second one – in the central part of China in 1916 (Beijing – Zhengzhou – Kaifeng – Jinan – Tianjin – Beijing). Two small separate circuital frameworks (aggregate (agglomeration) of circuits in the network) were generated in 1927 – In Manchuria and in 1933 – in the Central China. Both frameworks were united into big one in 1938, and this was the important structural event for all network. The number of circuits in the network increased to 29 in 1945. At that moment the circuital framework has covered only eastern strip of Central China.

The wars in Chinese area in 1937-49 were responsible for the decreasing of the mileage by 10.000 km and disintegration of main circuital framework into two isolated ones – again in Central China (with 5 circuits) and Manchuria (with 14 circuits). Both were united again into one big in 1959, when the network had 23 circuits. Next peak of network's growth took place in 1990-ties when the number of circuits grew up to 112, and the topological center of the network was located in the heart of the country.

The most of area (61%) of mainland China was covered by the circuital framework (see map 1), where 90% of all population lives. It has the core of network concentration with biggest density in Central China (provinces Hebei, Shanxi, Henan and Shandong). If all construction plans would be realized

in 2003-07, the Chinese railway network will overtake by its topological complexity (138 circuits) the Russian and Indian networks (see table 1) and giving in Germany, U.S.A., Poland, France and U.K.

Map 1. External extension of circuitual framework of Chinese railway network.



1 – the limits of external circuits of framework, 2 – the date of circuit formation (its closing), 3 – lines which would contribute the formation of new circuits in the next future (in 2004-2012), 4 – external dendrites, 5 – sections of external dendrites under construction now

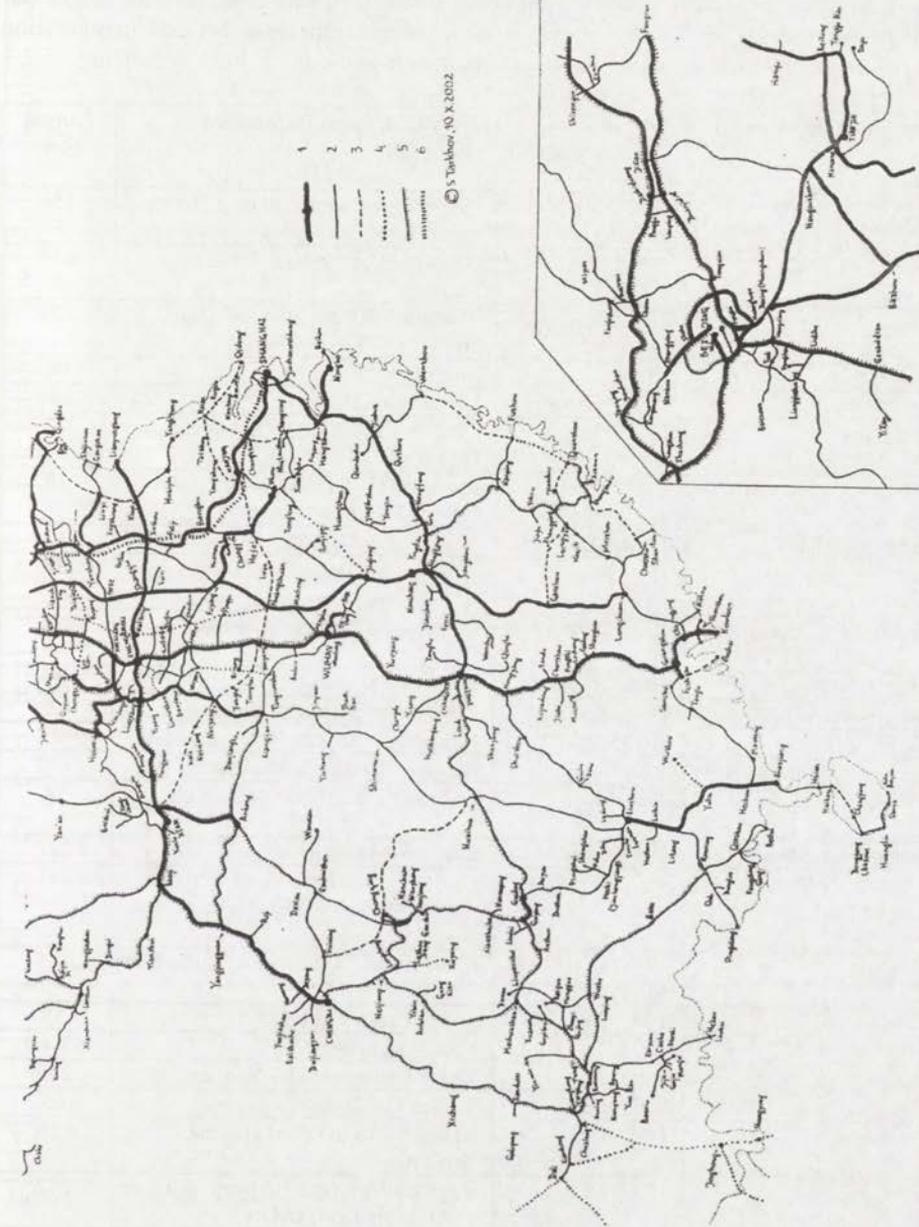
The circuital framework had an intensive growth initially only in Manchuria (1927-43) and finished there in 1966; it has been expanding in Central China as well in three stages: 1933-37 (covering the provinces Shanxi, Henan, Hubei, Anhui, Zhejiang, Jiangsu), 1958-70 (extended to the west) and 1991-2000 (extended to the south). This expansion will finish in the south-east during the next years (after the construction of new railways in seashore belt of the province Fujian) and in the east – in 2003-2010 (due to new line Dalian – Qingdao – Xinyi – Shanghai). Intensive inner growth of the circuital framework (in the form of splitting and fragmentation of big circuits into smaller ones) was and is continuing, notably on the area of Great Plains (provinces Hebei, Henan, Hubei, Anhui, Shandong, Jiangsu). The circuital framework had originally the elongated configuration (pattern) from the north-east to the south. There were the central and north-eastern (Manchuria) heartwoods in this framework before its intensive expansion. Both nuclei have merged after the long packing and expansion of framework (due to splitting of inner circuits and closing of new external circuits), but its meridional elongation didn't change at all (see map on Fig. 1): it has packing in the center, and bigger circuits are located in the south-east, south, south-west, and west. In addition, the circuital framework of Chinese railway network is disposed from sea-shore inside the mainland, inheriting the old Chinese tradition for inner land self-isolation.

Thus, the spatial structure of railway network of China has next features: meridionality (elongation from north-east to south), internal orientation (remoteness off seashore). The main axis of topological structure (along line Harbin – Shenyang – Tianjin – Beijing – Shijiazhuang – Wuhan) is the heart-trunk of all the network and repeating this steady meridionality.

New Lines

Near 20.000 km of new railways (see table 3 and map 2) have been built and opened during last 15 years. There are among it the trunk line North- South (Jing-Jiu) from Beijing to Shenzhen and Hong Kong, coal export main lines from coal basins of Shanxi and Shaanxi to the seaports, new lines from Inner China to export seaports and land export gates, penetration lines for developing-up of the peripheral areas. The list of the most important sections and lines of railway network constructed during 1988-2002 is presented in the table 3.

Map 2. Railways of China. (consists of two sheets: North (with the insert for Western China) and South (with the insert of area Beijing – Tianjin)).



1-double-track sections, 2 – single-track sections, 3 – new lines under construction, 4 – planned or discussed new lines, 5 – electrified sections, 6 – planned high-speed line Beijing – Shanghai.

Table 3. New railways of China built in 1988-2002.

E, W, N, S – east, west, north, south

The opening dates for the same section could distinct. In this case the date before parentheses is date of operation opening and inside parentheses – official inauguration date. ***Bold italics*** indicate Chinese abbreviations for some main lines consisting of 2-3 first initial characters of both termini.

<i>Provinces, its parts</i>	<i>Opening dates (inauguration dates)</i>	<i>Termini of lines, its location</i>	<i>Length (km)</i>
Heilongjiang, W	1988, Dec.	Nengjiang – Huolengmen – Heibaoshan	156
Shanxi – Hebei	1988, Dec.28	Datong – Dashizhuang (NE of Beijing)	410
Henan, E – Anhui, W	1989	Shanqiu – Fuyang (part of “ <i>Jing-Jiu</i> ”)	173
Hubei, S	1989	Jingmen – Shashi Nan	90
Heilongjiang, N	1989, October	Longzhen – Heihe	240
Shandong	1989, Dec.	Qingzhoushi (Yidu) – Shouguang – Dajiawa	72
Hebei	1990, April	Zhouyiaun – Kunyang – Baoxing (SW of Kunming)	18
Shandong, S	1990, May	Tienomao – Ganshan	33
Sichuan, SE	1990, June	Wansheng – Nanchuan (SE of Chongqing)	35
Henan, SE – Anhui, W	1990, July	Luohe – Zhoukou – Huaidian – Fuyang	206
Shanxi, NW	1990, August	Shenchi – Hequ	99
Hubei – Jiangxi	1990, Sept. 30	Daye (near Wuhan) – Jiujiang	129
Liaoning	1990, Sept.	Haicheng – Xiuyan (S of Shenyang)	90
Nei Mongol – Shaanxi	1991	Baotou – Daliuta – Shenmu	172
Yunnan	1991 ?	Kunyang – Yuxi Nan (S of Kunming)	54
Guangdong, SW	1991, May 3	Yaogu – Maoming	221
Xinjiang, NW – Kazakhstan	1991, July 20	Urumqi – Alashankou – Druzhba (goods service – 1991, Dec.; passenger – 1992, June 23)	481
Zhejiang	1991, Oct. (1994, July 1)	Changxing – Xuancheng (Huanzhou)	125
Sichuan	1991, Dec.	Longcheng – Luzhou	55
Nei Mongol, NE	1992	Tahe – Hanjiayan	57 + ?
Shaanxi	1992, Aug. 1	Xian (Zhangjiacun) – Yan’an	255
Jilin, E	1992, Sept.	Tumen – Hunchun	66
Shanxi, W	1992, Dec.	Xiaoyi – Liulin (W of Houma – Taiyuan)	116
Hebei, NE	1992, Dec. 21 (1993, Dec. 11)	Dashizhuang (near Beijing) – Liucun – Qinhuangdao (<i>Da-Qin</i>)	242
Guangdong, S	1992, Dec.	Changping (near Shenzhen) – Huizhou	48

Guangdong, S	1993, April (1994, Aug.)	Shenzhen (near Hong Kong) – Nantou	50
Shanxi	1993, May	Shenchi – coalfields at Hedong	138
Jiangsu	1993, June (1995, Dec.)	Xinyi – Huaiyiun (52 km to Shuyang – 1995, 28 Dec.)	108
Shanxi, NE – Hebei, NW	1993, June 18	Yangquan – Shexian	160
Guangdong, S	1993, October	Huizhou – Heyuan (<i>Jing-Jiu</i>)	80
Shandong, E	1993, Dec.	Taocun – Weihaiwei	135
Guangdong, E	1993, Dec.	Heyuan – Longchuan (<i>Jing-Jiu</i>)	75
Shanxi, E	1994 ?	Wuxiang – Modeng	75
Shanxi, E	1994 ?	Qin Xian – Qinyuan	48
Anhui	1994, Jan. 16	Hefei – Anqing	179
Shandong – Henan	1994, Aug. 10	Heze – Shanqiu	96
Nei Mongol	1994, Sept.	Chabuga – Zhelimu (line Tongliao – Jining)	187
Guangdong, E	1994, Oct. 28	Longchuan – Xingning	70
Shanxi – Henan	1994, Nov. 26	Houma – Yueshan	265
Hebei	1994, Dec.	Tianjin – Bazhou	78
Guangdong, E	1994, Dec. 28	Xingning – Meixian – Meizhou	51
Jiangxi – Guangdong	1995	Nankang – Longchuan (<i>Jing-Jiu</i>)	216
Anhui – Hubei – Jiangxi	1995, Febr. 26 (June 1)	Hefei – Gaohebu – Jiujiang	347
Zhejiang, S	1995, March (1996, April 21)	Jinhua – Jinyun (line to Wenzhou)	84
Guangxi, SW	1995, May 12	Qinzhou – Beihai	104 (95?)
Hebei – Shandong – Henan – Anhui	1995, May 21 (Sept.)	Beijing – Bazhou – Suning – Heng- shui – Liaocheng – Heze – Shanqiu – Fuyang (northern part of <i>Jing-Jiu</i>)	847
Nei Mongol – Ningxia – Gansu – Shaanxi	1995, June 8	Zhongwei – Baoji	502
Guangxi, NW	1995, Sept. 1	Nanning – Pingguo – Baise (Bose) (line to Kunming, 1 st stage)	210
Guangdong, E	1995, Sept. 28	Shejiang – Chaozhou – Shantou (Swatow)	135
Ningxia	1995, Oct.	Daba – Guyaozi (branch to line Baotou – Lanzhou)	74
Nei Mongol	1995, Nov. 30	Chabuga – Sanggentalai – Benhong (line Jinin – Tongliao)	943
Fujian	1995, Dec. 28	Zhangzhou – Quanzhou – Xiaoxie; Section Jimei – Jinjiang – Shichi – Quanzhou opened 1996, June 1	120 (68)
Yunnan, W	1996	Guangtong – Chuxiong (line to Dali)	38
Jiangsu, N	1996	Shuyang – Huaiyin	56
Heilongjiang, E	1996 ?	Huanan – Xiangyangshan (762 mm), branch to line Jiamusi – Mudanjiang	31
Yunnan	1996, May	Kunming – Luoping (line to Nan- ning)	143
Shaanxi, N – Shanxi, NW	1996, July 1	Daliuta – Shenchi (near Ningwu)	...

Anhui – Henan – Hubei – Jiangxi	1996, Sept. 1 (1997, July 1)	New southern sections of <i>Jing-Jiu</i> : Fuyang – Huangchuan – Macheng Macheng – Wuhan Macheng – Jiujiang Xingtang – Ji'an – Nankang	238 80 223 409
N – S (9 provinces)	1997, July 1	Inauguration of <i>Jing-Jiu</i> line: Beijing – Shenzhen	2370
Shanxi, N – Nei Mongol	1997, July 1	Datong – Fengzhen – Liangcheng – Qingshuihe – Zhungeer (Jangar Qi coal field)	216+45
Zhejiang, S	1997, Oct. 1 (1998, June)	Jinyun – Wenzhou	168
Yunnan – Guizhou – Guangxi	1997, Dec. 2	Kunming – Nanning (new sections: Luoping – Wusha – Tianlin – Baise, Wusha – Hongguo)	898 (436)
Sichuan	1997, Dec.	Chengdu – Daxian	395
Yunnan, W	1998, Aug.	Chuxiong – Dali (W of Kunming)	168
Hunan	1998, Oct. 16	Shimen – Changsha	264
Xinjiang, W	1998, Dec. 1 (1999, Dec. 6)	Kuxi (Korla) – Aksu	526
Hebei, S – Shandong	1999, March (2000, April 19)	Handan – Guangping – Liaocheng – Qihe (Yancheng) near Jinan	266
Jilin, E – Russia	1999, June (2000, July 17)	Hunchun – Makhalino	40
Beijing	1999, June 15	Beijing West – Huangchun (S of Beijing)	22
Xinjiang, W	1999, Dec. 6	Kuxi (Korla) – Aksu – Kashi (Kashgar)	974
Shanxi, N – Hebei, S	2000, May 18	Shenchi (Yuanping) – Dingzhou – Suning (line Shenmu – Suning – Huanghua coal fields)	418
Anhui	2000, Sept. 30	Bridge over Yangtze River at Wuhu + section Wuhu – Wuhu Bei instead the ferry	10,6
Fujian	2000, Dec. (2001, April)	Meizhou – Kanzhou (Kanshi)	147
Shaanxi, S	2001, Jan. 8	Ankang (Luhe) – Qinling tunnel – Yaocun (near Xian)	268 (241)
Shaanxi, N	2001, April	Shenmu – Yan'an	388
Sichuan, NE	2001, June 26	Daxian – Wanxian	156
Sichuan, S – Yunnan, N – Guizhou, NW	2001, Sept. 19 (2002, June)	Neijiang – Kunming (new section Anbian – Yanjin – Zhaotong – Meihaushan)	358
Guangdong, S – Hainan	2002, Feb. 28	Zhanjiang – Hai'an (port) + ferry Hai'an – Haikou (Hainan)	33
Yunnan – Guizhou, W	2002	Liupanshui – Shuicheng – Baiguo	126
Hebei	2002 (2003?)	Suning – Cangzhou	120

The longest new meridional trunk line constructed in 1990-ties is the railway *Jing-Jiu* from Beijing to Hong Kong 2337 km which was laid more

eastern than existing parallel main line Beijing – Guangzhou. It has been built with two tracks (excluding the southern section) to relieve the latter and to move the goods and passengers between Beijing, main intermediate transport nodes and Hong Kong, which became since 1 July 1997 as a part of China. Some feeder branches to big economic centers (Tianjin, Jinan, Wuhan, Hefei) were laid from this trunk line as well. This line was opened in September 1996, and the train covered all the distance from Beijing to Shenzhen in 48 hours since July 1997. This line crosses 9 provinces (which covered 12,7% of Chinese area and where 37,9% population lives). As the extension of this trunk line is the renovated and electrified line Guangzhou – Shenzhen – Kowloon.

The construction of latitudinal coal corridors from coalfields of provinces Shanxi and Shaanxi to export ports on Yellow Sea became the second goal for China, because the only old such corridor (Lunghai railway Baoji – Xian – Luoyang – Zhengzhou – Xuzhou – Lianyungang) was very overworked by the trains. Branches to new coal-export ports Shijiusuo (Yellow Sea) and Huanhua Gang (Bohai Gulf) were built in 1985, but they had not direct links from the main coal basins. This is why the southern coal corridors Houma – Yueshan – Xinxiang – Heze – Yanzhou – Shijiusuo and Handan – Hutun – Jinan were constructed in 1986-1994, and then the middle corridor Shenmu – Ningwu – Yuanping – Dingzhou – Suning – Cangzhou – Huanghua – in 1996-2002. 5th northern latitudinal corridor *Da-Qin* (the names of Chinese railways are formed from 2-3 first characters of termini names; for example, Da-Qin: **Da**tong = Da, **Qin**-huangdao = Qin) was laid in 1987-93 as well to link northern coalfields in Shanxi bypassing from the north Beijing area to big coal-export port Qinhuangdao at Bohai Gulf. This line was extended more west to new coal deposit Zhungeer in Inner Mongolia in 1997. So, 4 new coal corridors were added in 1985-2002 to the most southern old trunk Lunghai line.

The arrangement of special economic zones along the eastern and southern seashores of China in 1980-ties and 1990-ties led to the necessity to link it by railways with main network. New branches and lines were laid in 1986-2002 to seaports Fangcheng, Qinzhou, Beihai in Guangxi province; Nantou and Aotou (near Shenzhen and Hong Kong), Shantou and Zhuhai in Guangdong province (the latter is not yet completed); Quanzhou and Wenzhou in province Fujian; Beilun in province Zhejiang; Weihaiwei – in province Shandong. Some export seaports and special economic zones were linked (or are linking now) together along the seashore (Trans-Guangdong line Zhanjiang – Maoming – Guangzhou – Aotou in province Guangdong, Shantou – Xiamen – Quanzhou – Fuzhou – Wenzhou in provinces Guangdong and Fujian).

Two new land trans-border railway corridors were emerged during the last decade (see map 3): 1) line Urumqi – Alashankou – Druzhba linked Xinjiang and Kazakhstan in north-west; 2) line Tumen – Hunchun – Makhhalino between Eastern Manchuria and Primoskiy Kray (Region) of Far Eastern Rus-

sia. The third such land rail corridor between China and Kyrgyzstan & Uzbekistan is under construction now (line Kashi (Kashgar) – Torugart – Osh – Andizhan). There are the drafts to lay the cut-off between Xinjiang and south-eastern Kazakhstan (line Jinghe – Yining – Holmgous – Almaty) and new trans-border lines from Yunnan to Indochina and Thailand. If these projects realize, China would have 20 such rail corridors and 37 seaports having direct railway connections to main network up to 2010 instead 10 existed in 1985 trans-border railway links (2 – with Vietnam, 1 – with Kazakhstan, 1 – with Mongolia, 2 – with Russia and 4 – with North Korea) and 12 export sea-ports.

In addition to main and export lines the China has built in 1988-2002 some important interregional and inner-regional sections and lines. Such lines, which connect neighbor provinces and areas, are Nanning – Kunming (linked the provinces Yunnan, Guizhou, Guangxi), Ankang – Xian – Yan'an – Shennu – Baotou (connected provinces Shaanxi and Nei Mongol), Longchuan – Meizhou – Kanshi – Zhangping (between provinces Guangdong and Fujian), Anbian – Meihuashan (Sichuan and Yunnan), Baoji – Zhongwei (Shaanxi and Ningxia). Very important lines were constructed inside the provinces Sichuan (Chengdu – Daxian – Wanxian), Guangdong (Haian – Zhanjiang – Hechun – Maoming – Guangzhou – Longchuan – Shantou), Nei Mongol (Jining – Tongliao), Liaoning (Haicheng – Xiuyan), Guizhou (Liupanshui – Baiguo), Hunan (Changsha – Shimenxian) and shorter branches in the provinces Henan and Shanxi.

So, one meridional trunk line “North – South”, 4 new coal export rail latitudinal corridors, 2 land rail trans-border exits, 5 interregional and 10 inner-regional lines have been built and opened in China in 1988-2002. Southern Xinjiang railway (Korla – Aksu – Kashi), lines Baotou – Xian, Jining – Tongliao, Trans-Guangdong railway were constructed to develop-up the peripheral areas of China as well. New line and ferry connected the mainland China to island Hainan in 2002, and new railway will connect main network via Qinghai to Tibet in 2007.

Geographical distribution of technical equipments in Chinese railways

Gauge. Almost all railways in China originally have the standard gauge (1435 mm), because have been built by foreign companies from Europe. Some industrial, local and forest lines and branches have narrow gauge (1067 or 762 mm). Trunk lines in Manchuria were laid in Russian standard gauge (1524 mm) in 1901-03, but in 1906-09 and 1935 were re-gauged to 1435 mm. Japanese have built some their Manchurian lines with gauge 1067 mm during 1931-45, but later these were re-gauged to standard. New branches and sections in coal basins (in the provinces Henan, Shanxi) and 36 forest lines (mostly in Manchuria and in south-west) were built in 1955-1975 with gauge 762 mm. J. Yonge

(1998) mentions that there were 3600 km of lines with 762 mm in 1991 (most of it in provinces Henan – 1600 km, Hebei – 640 km, Guangxi – 420 km, Guangdong – 350 km, Hunan – 280 km, Liaoning – 240 km). Main line from Yunnan to Vietnam built in 1910 with the gauge 1000 mm was re-gauged in 1970-71 to 1435 mm.

Double tracks. Almost all railways in China had single track during long term. First double-track sections were laid in 1920-ties and 1930-ties in the main port areas (Tianjin – Tanggu, Tangshan – Qinhuangdao, Suzhou – Shanghai) and in Manchuria (Dalian – Shenyang – Chanchung). Double-tracking was made in 1954-59 along main line Shenyang – Tianjin – Beijing – Wuhan – Zhuzhou, in 1960-ties – along main line Zhuzhou – Guangzhou and branches to coal centers Datong, Yangcuan and line Shanghai – Nanjing. Second track was laid along main line Tianjin – Jinan – Nanjing in 1976.

The doubling boom took place in 1987-2001, when double-track lines formed its own circuitual framework (all double-track lines are indicated on the big map 2), elongated from north-east to south – from Qinhuangdao via Beijing – Zhengzhou – Zhuzhou – Xiangtang to Shanghai. Four main meridional railways (Datong – Yuci – Houma – Luoyang – Xiangfan – Shimenzhan; Jiamusu – Harbin – Shenyang – Beijing – Wuhan – Guangzhou – Kowloon; Beijing – Heze – Fuyang – Xiangtang – Longchuan; Qinhuangdao – Tianjin – Jinan – Xuzhou – Shanghai) and four latitudinal (Qinhuangdao – Shacheng – Datong – Baotou, Dezhou – Shijiazhuang – Taiyuan – Houma, Lianyungang – Xuzhou – Zhengzhou – Luoyang – Xian – Baoji, Shanghai – Hangzhou – Xiangtang – Zhuzhou), and lines Shenyang – Dalian, Manzhouli – Harbin – Mudanjiang – Suiyang, Wuwei – Yumen – Urumqi – Wuxi, Baoji – Chengdu, Liuzhou – Litang – Zhanjiang have two tracks completely.

One third of all state railways have two tracks now (near 21.000 km). Their list shows the table 4.

Construction of second tracks is continuing and next sections and lines were under way in 2002: Baoji – Lanzhou – Wuwei, Lanzhou – Gantang – Zhongwei – Baotou, Ankang – Chongqing, Zhuzhou – Guiding – Guiyan – Liupanshui, Litang – Nanning, Xinxiang – Heze – Linyi – Shijiusuo (coal rail corridor), Hefei – Yuxikou (Wuhu), Qingdao – Yantai.

Electrification. Only two short industrial branches (Fushun West Pit line in Liaoning with 30 km, 1200 V d.c., which has been transformed into 1500 V d.c. in 1937; and industrial circular line serving the metallurgic works at Anshan opened in the same province in 1950-ties) and one mountain section Baoji – Fengzhen in July 1961 (with 25 kV 50 Hz) were electrified up to middle 1970-ties. Electrification at 25 kV 50 Hz was made in 1975-87 along single-track mountain sections in the west and inside coal province Shanxi.

Table 4. Double-tracking of Chinese railways in 1987-2002.

<i>Provinces</i>	<i>Opening dates</i>	<i>Termini of sections</i>	<i>Length, km</i>
Guangdong	25.01.1987	Guangzhou – Changping	90
Shanxi – Hebei	31.05.1987	Datong – Shacheng (<i>Da-Qin</i>)	234
Shanxi – Nei Mongol	22.11.1988	Datong – Jinin – Huhehaote	285
Guangdong – Hunan	16.12.1988	Guangzhou – Hengyang	541
Hebei	21.12.1988	Shacheng – Dashizhuang (<i>Da-Qin</i>)	176
Henan – Shanxi – Shaanxi	1988-89	Zhengzhou – Luoyang – Xian	511
Shanxi	22.08.1989	Yuci – Houma	307
Nei Mongol	10.03.1990	Huhehaote – Baotou	134
Nei Mongol – Heilongjiang	26.07.1991	Hailar – Harbin	935
Zhejiang	25.12.1991	Shanghai – Hangzhou	187
Hebei	21.12.1992	Dashizhuang – Qinhuangdao (<i>Da-Qin</i>)	220
Guangdong	1993?	Changping – Shenzhen	57
Anhui	6.09.1994	Fuyang – Huainan	96
Gansu – Xinjiang	16.09.1994	Wuwei – Hami – Urumqi – Wuxi	1622
Zhejiang	.02.1995	Hangzhou – Jinhua	152
Hebei – Henan – Anhui	21.05.1995	Beijing – Fuyang, Bazhou – Tianjin (<i>Jing-Jiu</i>)	853+77
Shanxi	.12.1995 - .01.1997	Houma – Yueshan	265
Zhejiang – Jiangxi – Hunan	26.01.1996 (.05.1998?)	Jinhua – Xiangtang – Zhuzhou	765
Anhui – Jiangxi	1.09.1996	Fuyang – Xiangtang + 3 tracks Changping – Shenzhen	624+57
Hunan – Guizhou	25.01.1997	First section of the line Zhuzhou – Guiding	?
Jiangsu	24.12.1997	Xuzhou – Lianyungang	116
Zhejiang	.11.1999	Xiaoshan (near Hangzhou) – Ningbo	147
Shaanxi – Sichuan	26.12.1999	Baoji – Chengdu	669
Jiangxi – Guangdong	1999	Xiangtang – Longchuan	635
Guangxi – Guangdong	1999	Litang – Yulin – Zhanjiang	318
Shandong	.01.2001	Linyi – Yanzhou	138

The next lines and sections were electrified (see table 5 and map 2) in 1988-2002: main meridional line Beijing – Zhengzhou – Wuhan – Zhuzhou, western part of Lunghai line (Zhengzhou – Xian – Baoji – Lanzhou – Wuwei), coal rail corridor Zhungeer – Datong – Qinhuangdao, meridional coal line Baotou – Datong – Taiyuan – Yueshan – Houma, and the lines Wuwei – Zhongwei – Yinchuan – Shisuishan, Zhongwei – Baoji, Chongqing – Guiyang, Chengdu – Kunming – Nanning, Kunming – Liupanshui – Guiyang – Huaihua – Zhuzhou, Neijiang – Anbian – Meihuashan, Foshan – Guangzhou – Shenzhen, Yingtan – Yikou – Xiamen – Quanzhou. Electrification of Southern Manchurian railway (Dalian – Shenyang – Changchun – Harbin) was completed in 2001

and is under way along lines Chongqing – Daxian and to Fuzhou now. The lines Xining – Golmud (Geermu) in province Qinghai, Wuwei – Yumen in provinces Gansu and Xinjiang, Zhuzhou – Yingtan – Hangzhou – Shanghai – Nanjing will be electrified in 2003-2010. Only 20% of state railways of China are electrified now.

Table 5. Electrification of Chinese railways in 1987-2002.

<i>Provinces</i>	<i>Opening dates</i>	<i>Termini of lines and sections</i>	<i>Length, km</i>
Henan	3.01.1987	Zhengzhou – Sanmexia	268
Shanxi	31.05.1987	Datong – Shacheng (<i>Da-Qin</i>)	234
Sichuan	28.12.1987	Chengdu – Chongqing	505
Hunan – Guangdong	1988	Chenzhou – Shaoguan (line Hengyang – Guangzhou)	155
Fujian	1988	Yong'an – Zhangping	105
Hebei	.05.1988	Beijing Nan – Huangtudian (circle around Beijing)	41
Shaanxi	1.10.1988	Sanmexia – Xian	265
Shanxi – Nei Mongol	24.11.1988?	Datong – Huhehaote	285
Hebei	21.12.1988	Shacheng – Dashizhuang (<i>Da-Qin</i>)	176
Shaanxi	24.12.1988	Xian – Baoji	173
Guizhou	26.12.1988	Guiyang – Guiding – Yangping	325
Shanxi	1.08.1989	Datong – Taiyuan	340
Guizhou – Yunnan	29.12.1989	Liupanshui (Suicheng) – Xuanwei	132
Nei Mongol	10.03.1990	Huhehaote – Baotou	134
Yunnan	17.07.1990	Xuanwei – Kunming	258
Fujian	16.06.1991	Yingtan – Yong'an	409
Guizhou	20.10.1991	Guiyang – Zunyi (line Guiyang – Chongqing)	150
Henan	30.12.1991	Zhengzhou – Xinyang (line Beijing – Wuhan)	302
Gansu	26.01.1992	Lanzhou – Dachaigou (line Lanzhou – Wuwei)	166
Gansu	2.09.1992	Dachaigou – Wuwei	282
Hebei	21.12.1992	Dashizhuang – Qinhuangdao	220
Henan – Hubei	31.12.1992	Xinyang – Wuhan	232
Sichuan	.07.1993	Zunyi – Chongqing	275
Guizhou	.07.1993	Suicheng (Liupanshui) – Guiyang	390
Fujian	28.12.1993	Zhangping – Xiamen	181
Fujian	28.12.1993	Guokeng – Zhangzhou	11
Shanxi	1995	Houma – Yueshan	253
Shaanxi – Ningxa	1.06.1995	Baoji – Zhongwei	498
Fujian	1.05.1996	Xiamen – Quanzhou	68
Gansu	1996	Gangtang – Wuwei	172
Hunan	1996	Huaihua – Loudi	317
Henan	1996	Zhengzhou – Anyang	187
Guizhou – Hunan	.04.1997	Yangping – Huaihua	130
Shanxi – Nei Mongol	1.07.1997	Datong – Zhungeer	264

Hebei	.10.1997	Shijiazhuang – Anyang	225
Yunnan – Guangxi	2.12.1997	Kunming – Nanning	898
Hebei	.08.1998	Beijing – Shijiazhuang	266
Guangdong	28.08.1998	Guangzhou – Changping – Zhenzhen	147
Gansu – Ningxia	10.11.1998	Lanzhou – Gantang – Zhongwei – Yinchuan – Shizuishan	565
Hunan	18.01.1999	Zhuzhou – Loudi	125
Sichuan – Yunnan	30.09.2000	Chengdu – Kunming	1100
Shaanxi	8.01.2001	Xian – Ankang	267
Liaoning – Jilin – Heilongjiang	8.08.2001	Shenyang – Harbin	550
Sichuan – Yunnan	19.09.2001	Neijiang – Anbian – Meihuashan	358
Hubei – Hunan	.09.2001	Wuchang (Wuhan) – Changsha – Zhuzhou – Chenzhou, Shaoguan – Guangzhou	690+22 0
Liaoning	30.11.2001	Shenyang – Dalian	400
Liaoning	End of 2002	Qinhuangdao – Shenyang (high speed line)	422

Railway ferries. Before the completion of two long bridges via Yangtze River there were two railway ferries at Wuhan and Nanjing, and one via Huang Ho at Fengingdu (the border between Shanxi and Shaanxi provinces).

New sea rail ferry between mainland (Haian) and island Hainan (Haikou) 33 km via Quiongzhou straits was inaugurated in February 2002 together with a new line Zhanjiang – Haian which links the main network with island. When new section along the island complete, new trunk line Yue-Hai (Guangdong – Hainan) will have 543 km and arrange reliable connection of this new economic zone with mainland. This is the first sea ferry line in China. There is a draft of tunnel construction under straits in 18 km in the future.

The second rail ferry line of 157 km will be opened in 2003-2004 and connect seaports Yantai (province Shandong) and Dalian (Liaoning) via Bohai straits. This line will link by shortest way two very advanced provinces of China and open the direct connection between the north-eastern and eastern & central parts of the country bypassing the overcrowded transport nodes at Qinhuangdao, Tianjin, Beijing. The construction of new terminals in both ports, double track Lancun – Yantai, and new cut-off line Qingdao – Jiacoixian – Xinyi – Haian – Shanghai (along shore of Yellow Sea) are under construction now and will increase of capacity of old facilities in this transit corridor. One ferry could move 53 railway cars, 50 trucks, 1400 passengers. 9 ferries will operate here since 2004.

Big railway bridges. No bridges had existed via Yangtze River till 1957 and the train crossed it by ferries at Wuhan, Wuhu and Nanjing. Two bridges were built via Huang Ho River before 1920 – at Zhengzhou (2899 m) and near Jinan at Loukou (1225 m).

The Huang Ho River has been crossed by the new railway bridges at Fenglingdu in 1960-61, for the second track at Zhengzhou in 1960 (3 km), for the second track near Jinan - in 1976 (5698 m), at Dongxian - in 1986 (10,2 km), at Sunkou (line Jing-Jiu) - in May 1995 (6685 m). The Yangtze River was crossed at Wuhan by double-deck bridge in October 1957 (1670 m), at Chongqing - in 1960 (820 m), at Nanjing - in October 1968 (6 km), at Jiujiang - in 1996 (7675 m) and at Wuhu - in September 2000 (10,5 km). Some long bridges have been built over another big rivers, including bridge via Qiantangjiang near Hangzhou (1073 m) in the province Zhejiang.

Railway tunnels. Some railways in China are crossing the mountain ridges. To avoid long and steep slopes the Chinese Railways have built many tunnels. The longest one (Qinling, 18.450 m) was opened in 2001 in the middle of new line Xian - Ankang. The second place has the Dayaoshan tunnel (14.390 m) near Lechang (line Hengyang - Guangzhou, south of the country). Another very long tunnels are Mihualing (9630 m, location is unknown), at Hangzhou (8950 m), Jundushan (8460 m, to the north of Beijing, line Shacheng - Dashizhuang), Yuntaishan nr. 1 and nr. 2 (8100 m and 8170 m, near Lianyungang (Xinpu)), Fenshui (4700 m, line Daxian - Wanxian), Wuzhishan (4455 m, near Shenzhen).

Construction of under-water tunnels are planned: 1) 6,7 km under the Yangtze River at Nanjing for the future high-speed line Beijing - Shanghai; 2) 18,2 km under Quiongzhou straits between island Hainan and mainland.

High-speed railways. The plan of high-speed lines has been made-up in the middle of 1990-ties, which included trunk lines Beijing - Shenyang - Harbin, Beijing - Shanghai, Beijing - Zhengzhou - Wuhan - Changsha - Guangzhou, Haizhou - Zhengzhou - Xian - Lanzhou. Priority was paid to high-speed line Beijing - Shanghai (under abbreviation *Jinghu*) 1330 km. It must direct parallel to existing line Beijing - Tianjin - Jinan - Xuzhou - Bengbu - Nanjing - Shanghai with some deviations (it's indicated on the map 2 by sign "6"). The speed goods and passenger trains would cover all the distance in 6 hours and a half by the plan with speed at 250 km/h. 24 stations would be built here. This plan was made-up in 1993, but never realized due to financial reasons.

New step was made in 1998, when the idea to construct an experimental section with speed at 300 km/h (Beijing - Tianjin or Shanghai - Nanjing) appeared. But this decision didn't make till now. The destination of this high-speed line would depend on the success of Maglev line, which is under construction in Shanghai suburb now. If this system is efficient and technically proved, Maglev technology would be adopted for Beijing - Shanghai high-speed line; if - not, the Chinese Railways have an intention to use Japanese wheel technology of Shinkansen. The construction of this line would start not

earlier than 2006 and only on the first stage between Shanghai and Nanjing (with a under-water tunnel).

High-speed experimental section between Shanghai and Hangzhou (170 km) with using of German technology "Maglev" (magnet air-cushion between track-bed emerging by powerful electromagnets located in the bed and under the train) was under discussion in 1996, but the high construction costs were main reason to reject this idea. After long discussion they decided to build the short trial section 30 km between Shanghai and its new international airport at Pudong area, and, if this idea is efficiently realized, to extend the line then to Hangzhou.

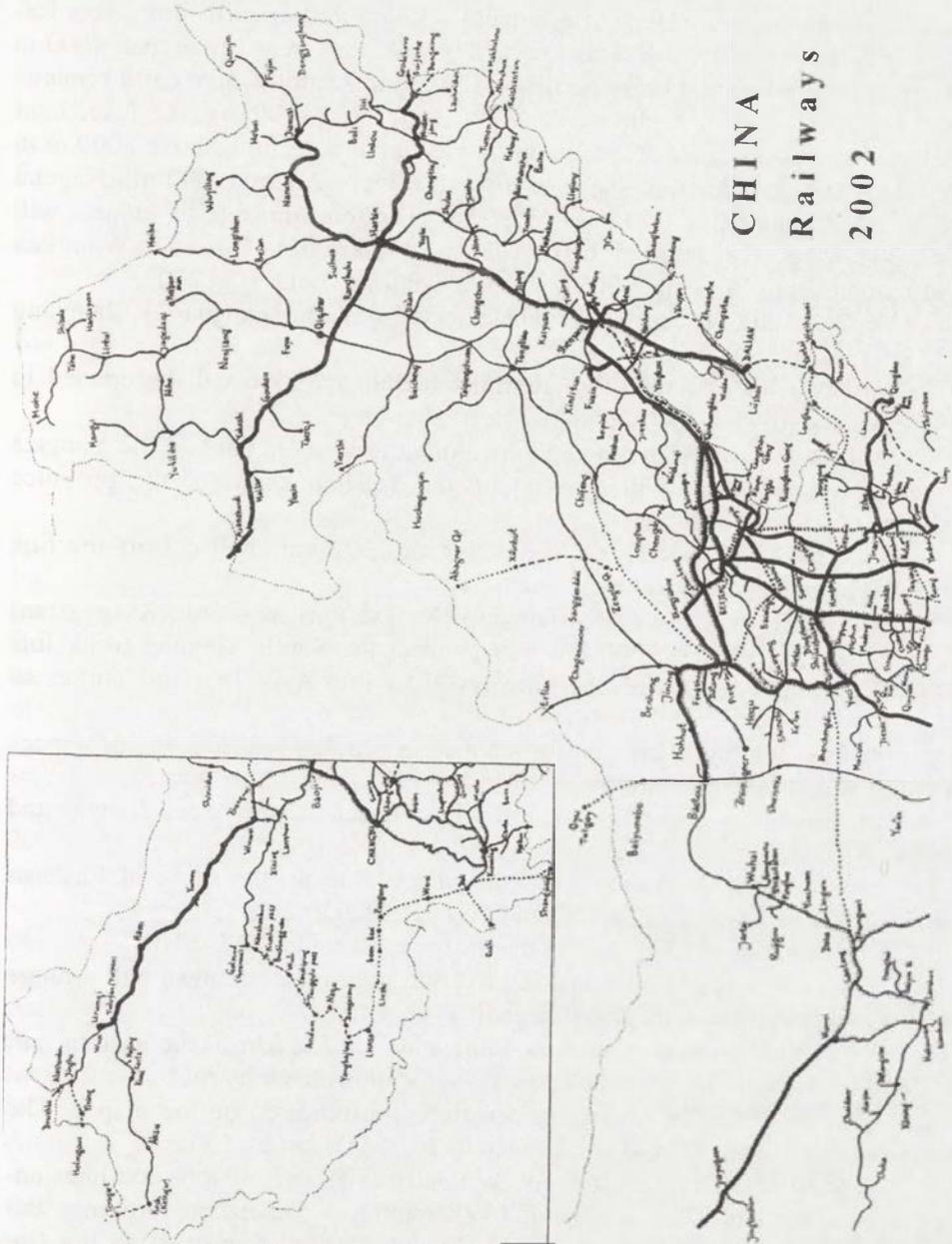
The construction of experimental "Transrapid" line 31 km between Pudong International airport and Longyang Road in the south-eastern suburb of Shanghai started in November 2001 by the German Transrapid consortium, comprising Thyssen Krupp and Siemens. The first train, produced in Germany, arrived to Shanghai in August 2002. It will move with the speed 430 km/h and cover all the distance in 5 minutes. Operation is scheduled to open on 31 December 2003.

As long as realizing this experiments, the Chinese Railways started the renovation of main trunk lines and increasing of its train's speed. The trains with 160 km/h started its operation along the line Guangzhou – Shenzhen since 23 December 1994, covered the distance 147 km in 67 minutes after big reconstruction of track bed. Regular service here was opened in March 1995. The speeded-up operation till 160 km/h was introduced along lines Beijing – Shanghai, Beijing – Guangzhou, Beijing – Harbin, Shenyang – Dalian, Lianyungang – Xian since 1 July 1998, and Beijing – Tianjin – since 18 October 2000 (135 km in 79 minutes). The trains Guangzhou – Shenzhen operated with the speed at the level 200 km/h since January 2001.

The construction of the first passenger dedicated speed railway Qinhuangdao – Shenyang (422 km) with technology applied at Guangzhou – Shenzhen quasi-speed line started in August 1999 and will follow existing line (which is overcrowded by enormous number of goods and passenger trains) with some southern deviation just near Shenyang. Special trains for 200 km/h will operate there since the end of 2002 – beginning of 2003. This line would be trial section for future high-speed trains which would serve the line Beijing – Shanghai. A plan for high-speed passenger line Chongqing – Chengdu in province Sichuan is under draft.

Plans and perspectives

Next important lines and new sections were under construction in 2002 (see details on the map 3).



1) Latitudinal trunk line Xian – Nanyang – Xinyang – Huangchuan – Hefei – Nanjing 1129 km will connect big cities along the Yangtze River valley and relieve the Lunghai railway. The first section to Huangchuan will be opened in 2007 and the rest – in 2010.

2) Line Golmud (Qinghai province) – Lhasa 960 km will link Tibet Region with the main network. This line will pass Alpine areas (more than 4000 m above the sea level) and cross permafrost (600 km section where earth remains frozen year around). The line will climb from 2800 m above sea level near Golmud to 4722 m to reach the Khunu-la pass, and then climb above 5000 m to the Tanggula pass, where it starts its steep descent to Anduo (4600 m), Nagchu (4300 m), Dangxiong, and Lhasa (3590 m). The total mileage of tunnels will have 30 km. The formation of the first section 147 km from Gormo to Wangkun was completed in November 2001. The line would be opened in 2007.

3) Quasi high-speed passenger dedicated line Qinhuangdao – Shenyang 422 km (see above).

4) Ferry line Yantai – Bohai straits – Dalian 57 km will be opened in 2003 (see above).

5) Line Nanjing – Qidong 357 km along the northern bank of the Yangtze River up to its mouth will develop up the seashore areas of the province Jiangsu.

6) Line Xinyi – Jiaoxian (near Qingdao) 302 km will cut-off the link between Shandong peninsula and Shanghai.

7) Line Kashi (Kashgar) – Torugart (Kyrgyz border) – Osh (Kyrgyzstan) – Andizhan (Uzbekistan) 300 km will connect the South Xinjiang trunk line of the Chinese network with the railways of Central Asia, Iran and Turkey to 2005.

8) Line Suning – Chongqing – Huaihua 625 km will link the provinces Sichuan and Hunan in 2006.

9) Ganzhou – Longyan 280 km will connect the provinces Jiangxi and Fujian in 2006.

10) Wenzhou – Fuzhou 352 km will develop up the shore of Eastern-Chinese Sea in provinces Zhejiang and Fujian to 2005.

11) 1900 km of local lines in the province Hebei in 2002-2010.

12) Xinyi – Haian – Changxing 571 km in province Jiangsu will arrange the north-western bypassing of Shanghai.

13) Xilinhot – Shangendalak – Zhenglan Qi 152 km in the eastern part of Nei Mongol will supply the electric power stations there by fuel.

All these lines are under construction and indicated on the map 2. The total mileage of state railways will reach up to 75.000 km by 2005.

In addition, there are some not completed lines and sections and lines under project or plan. They are Jiandou (Zhangping) – Quanzhou (province Fujian), Guangzhou – Foshan – Zhuhai – Macao 150 km (construction not finished, province Guangdong), Quanzhou – Fuzhou 212 km (Fujian), Yulin – Wuzhou 220 km (Quangxi), Tongling – Jiujiang 237 km (Anhui – Jiangxi provinces, along the right bank of the Yangtze River), Xiuyan – Zhuanghe (Liaoning), Chaozhou – Zhangzhou (near Xiamen) 220 km (province Guang-

dong), Changzhi – Taiqian 495 km (Henan), Datong – Baoding – Bazhou (provinces Shanxi – Hebei), Ji Xian – Tianjin Harbor 180 km, Jinghe – Yining – Holmgous 300 km (Western Xinjiang), Dahushan – Panjin (Panshan) – Yingkou 146 km (Liaoning), Suiyang – Dongning 100 km (Heilongjiang, near Grodekovo), Zhongwei – Taiyuan (Ningxia – Shaanxi – Shanxi), Bayan Obo (near Baotou) – Oyu Tolgoi 290 km (Mongolia), Chifeng – Datong (Hebei). After the completion of Golmud – Lhasa line (2007) the construction of second leg to Tibet 1594 km is planned from the province Yunnan via Dali – Weixi – Zuogong – Basu – Bomi – Linzhi to Lhasa. There are some chances to lay the railway lines from Yunnan to Myanmar (Burma) and Thailand: from Dali to Ruili – Myitkyina (Myanmar) and Dali – Jinghong – Chiang Rai – Chinag Mai (Thailand), Jinghong – Ban Pakou – Vientiane (Laos) – Nong Khai.

Conclusions

Meridionality of circuital framework from north-east to south is main spatial characteristic of Chinese railway network. This framework covers central and eastern part of Chinese mainland, but not fill up all the area of the country. Lesser circuits (by the area) are concentrated along the main trunk axis Beijing – Wuhan (provinces Hebei, Shanxi, Henan) and bigger ones – in south-west, south, south-east. Manchuria is still keeping as the second sealing focus of framework.

Intensive growth of the network during last 15 years has led to inner sealing of circuital framework, its expansion to the south, and to significant complication of its structure. The opening the ferry rail line Dalian – Yantai in 2003 will lead to the expansion of circuital framework to the east and north-east, and the further network growth.

Despite the speed inner and external growth of circuital framework of Chinese railway network, low level of the transport developing-up of less populated areas is keeping and will keep in the western (Chinese “Central Asia”) and northern Mongol (Chinese “Siberia”) parts of the country. More than half of the Chinese territory is being as “economical desert”. The railway network is concentrated in its eastern half with the heartland of high level of density in the Central China (provinces Shanxi, Henan, Hebei, Shandong, Anhui).

There are 6 meridional and 13 latitudinal trunk lines inside the circuital framework of the Chinese railway network, and two long external dendrites of economic penetration in the west (in Xinjiang and Qinghai).

The mileage of state railways in China increased from 52.000 to 70.000 km and the number of its circuits – from 74 to 112 during last 15 years (1988-2002). Nevertheless, it are not enough for such a large country as China. Net-

work must have at least 125.000 km, will be much more dense, and cover all south, south-east and especially the eastern seashore.

The share of double-track sections (30%) and electrified sections (20%) is very low and needs to increase drastically. It is in order to increase the number of railway trans-border exits from Manchuria to Russia, to arrange the sea-ferry rail link between mainland and Taiwan.

Thus, in spite of unique high rates of network growth in the world, the concentration of network in the central parts, its meridional extension in the eastern half of the country, just almost full lack of the network in the western half, inner land (not seashore) orientation of network structure are the main spatial breaks and disproportions in Chinese railway network.

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Streszczenie

ROZWÓJ SIECI KOLEJOWEJ WE WSPÓŁCZESNYCH CHINACH

Główną cechą charakterystyczną chińskiej sieci kolejowej jest ułożenie południkowe szkieletu obwodowego. Szkielet ten obejmuje część środkową i wschodnią Chin lądowych, lecz nie pokrywa całości kraju. Mniejsze (obszarowo) szkielety są skupione wzdłuż głównej osi komunikacyjnej Beijing (Pekin) – Wuhan (prowincje Hebei, Shanxi, Henan), a większe – na południowym-zachodzie, południu i południowym-wschodzie. Mandzurię traktuje się nadal jako drugorzędne ogniwo uszczelniające szkieletu.

Intensywny rozwój sieci w ciągu ostatnich 15 lat doprowadził do uszczelniania wewnętrznego szkieletu obwodowego, jego rozszerzenie się na południe i do znacznego skomplikowania się jego struktury. Otwarcie linii promowo-kolejowej Dalian – Yantai w 2003 r. doprowadzi do rozszerzenia się szkieletu obwodowego na wschód i północny-wschód, oraz do dalszego rozwoju sieci.

Mimo dużego tempa wewnętrznego i zewnętrznego rozwoju szkieletu obwodowego chińskiej sieci kolejowej, niski poziom rozwoju transportowego gorzej zaludnionych obszarów utrzymuje się i będzie utrzymywał w zachodniej części (chińskiej „Azji Środkowej”) i północnej części (chińska „Syberia”) kraju, tzw. Mongolii Wewnętrznej. Ponad połowa terytorium Chin jest „pustynią gospodarczą”. Sieć kolejowa skupia się w jego wschodniej połowie, a jego „serce” – o dużej gęstości – w Chinach środkowych (prowincje Shanxi, Henan, Hebei, Shandong, Anhui).

W obwodowym szkielecie chińskiej sieci kolejowej jest 6 magistrali południkowych i 13 równoleżnikowych, oraz dwa długie rozgałęzienia (celem przenikania gospodarczego) na zachód (w Xinjiang i Qinghai).

Długość państwowych kolei w Chinach wzrosła z 52 000 to 70 000 km, a liczba okręgów – z 74 do 112 w ciągu ostatnich 15 lat (1988-2002). Tym niemniej, nie są to wielkości wystarczające dla takiego wielkiego kraju jak Chiny. Sieć winna posiadać przynajmniej 125 000 km, wtedy będzie znacznie gęściejsza, oraz powinna obejmować całe południe, południowy-wschód, a szczególnie wschodnie wybrzeże morskie.

Udział odcinków dwutorowych (30%) i zelektryfikowanych (20%) jest bardzo niski i trzeba go znacznie zwiększyć. Jest to potrzebne dla zwiększenia liczby transgranicznych przejść kolejowych z Mandżurii do Rosji i stworzenia połączenia promowokolejowego pomiędzy stałym lądem i Tajwanem.

Tak więc, mimo nadzwyczajnie dużej, w skali światowej, szybkości rozwoju sieci w części środkowej, oraz ekspansji południkowej we wschodniej części kraju, to prawie całkowita nieobecność sieci w zachodniej połowie, orientacja do wewnątrz lądu (a nie ku wybrzeżu) struktury sieci są głównymi przestrzennymi brakami i dysproporcjami w chińskiej sieci kolejowej.

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