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REGULAR PAPERS

REMARKS ON THE ROLE OF DIRECT DEMOCRACY IN THE PROCESS OF EUROPEAN INTEGRATION – THE EXAMPLES OF BRITISH AND HUNGARIAN REFERENDA IN 2016¹

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Abstract

The practice of using direct democracy instruments in European Union countries shows that “European” issues have become an increasingly popular subject of public debate and then of referenda. The stimulus to analyze the British and Hungarian referenda in 2016 was provided by the topicality and importance of the respective referendum issues both for the UK and Hungary, as well as for the whole European Union. The main thesis proposed in this paper is that in recent years referenda have become very popular instruments for making decisions with respect to European crises (Grexit, Brexit, migration crisis). The main objective of this paper is to answer the question about the use of referenda on the issues of European integration and about the course and consequences of the British and Hungarian referenda in 2016.

Key words: *direct democracy, the UK, Hungary, European integration*

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The practice of using direct democracy instruments in the European Union's countries shows that, alongside numerous referenda held on matters of the state, "European" issues are becoming an increasingly popular subject of public debate followed by voting. Using a national referendum to make decisions pertaining to the process of European integration is far from being a new phenomenon since a first such referendum was held as early as 1972. Since then, European integration has been the subject of nearly sixty national referenda in EU member states, candidate countries and in third countries bound with the European Union by all kinds of bilateral agreements (Switzerland, Liechtenstein). Although the majority of experiences gathered in the process of holding referenda on "European" issues are apparently positive, there have also been cases when referenda generated problems both for member states and the European Union, for example as concerned ratifying EU treaties.

The British referendum was the 58th referendum on "European" issues (pertaining to European integration processes) and the third one, following that in Greece of July 5, 2015 (on accepting financial aid on account of a financial crisis) and that in Denmark of December 3, 2015 (on advanced collaboration with the EU in justice and home affairs), where voters expressed their "disapproval" for deeper European integration. Such attitudes of societies in EU member states make it possible to state that the skepticism of European citizens towards integration processes in the Old Continent is growing, which is likely to have been triggered by the financial crisis the EU has been struggling with since 2008 on the one hand, and by the refugee crisis the EU seems unable to resolve on the other. These difficulties are probably topped by problems with the economic migration from new EU member states into some countries of the "old EU-15" which frequently translates into the "resistance" of the latter. Both the 2016 referendum in the UK and in Hungary seem to respond to the above-mentioned crises.

The European Union can be said to have accumulated somewhat traumatic experiences related to referenda on several treaties that had to be taken twice, as the first referenda held in some countries were lost by the advocates of deeper European integration [Musiał-Karg, 2014, pp. 81-82]. This can be exemplified by the common vote in Denmark in 1992 and 1993 on the adoption of the Maastricht Treaty, or the "repeated" Irish referenda on the Nice Treaty (in 2001 and 2002) and the ratification of the Lisbon Treaty (in 2008 and in 2009). Two more national referenda on the "Constitution for Europe" Treaty of 2005 should be mentioned here. Both that held in France on May 29 and that in the Netherlands of June 1 brought negative results, thereby causing a "ratification crisis" in the European Union. This made other states planning to hold referenda on the same issue (with the exception of Liechtenstein where a referendum was held on July 10) suspend voting (e.g. Great Britain). In June 2005, a "time to reflect" on the Constitutional Treaty was announced, showing that it would be practically impossible to adopt the document in the shape agreed in 2004. After the Lisbon Treaty was signed in December 2007, aiming to modify earlier EU treaties (by means of incorporating a portion of the provisions of the Constitutional Treaty, among other things), only one state, Ireland, opted to leave the decision on the ratification of the Treaty to its citizens. The first referendum was lost in June 2008, and it was followed by the next one in October 2009 bringing the approval of the matter under vote. Every time

the citizens of an EU member state rejected a treaty, the European Union was said to be witnessing an integration crisis. When another referendum was held again on the same issue in one of those states, questions were asked whether it was admissible to have practically the same referendum twice in a democratic state. Sometimes the threat of holding a referendum, as was the case when a referendum on another aid package for Athens was announced in Greece in 2011, caused turmoil on financial markets and confusion among European leaders on the one hand and political consequences, such as the dismissal of the head of government on the other (Greek Prime Minister Jeorjos Papandreu) [*Premier Papandreu...*, 2011; *Grecja: referendum...*, 2011]. Significant controversies were also stirred by the UK Prime Minister, David Cameron, who addressed British frustration with the contemporary form of the EU, announcing a referendum on whether the UK should remain in the EU.

The economic crisis undermined support for the European Union, which is frequently accused of refusing to take democratic responsibility, since the treaties are accepted by national parliaments and do not directly involve citizens in a majority of member states. Participation of eligible voters in popular votes is one of the crucial issues related to the role of sovereign nations in a democratic system. Many believe that civil involvement in the processes of political decision-making in the European Union should constitute one of the most significant elements to legitimize the activities of the EU.

THE BREXIT REFERENDUM

Since the very beginning of the UK's involvement in European integration processes, its level of Euroskepticism has been known to be higher than elsewhere. Despite having joined the Community in 1973, thereby being one of the oldest "non-founding fathers," the UK continuously debated the issue of leaving the EU, and the idea of holding a referendum kept recurring every couple of years or so. British skepticism was obvious practically from the time of accession. This attitude became apparent in the times of Margaret Thatcher, who negotiated a "British discount" in 1984, reducing the amount the UK would contribute to the EU budget. This was justified by the fact that a significant proportion of the European budget was allocated to the Common Agricultural Policy which practically did not benefit London at all.

In the early years of the UK's membership of the Community, Euroskepticism was manifested most ostentatiously by a referendum on continued membership, held on June 5, 1975 [Musiał-Karg 2008: p. 100; Musiał-Karg 2012: 206]. This was the first referendum in the UK, and the fifth in Europe, on European integration. This was also the first referendum on continued membership rather than accession to the Community. Over half of British citizens that went to the polls, in the majority of the 68 counties and over half the regions, as well as in Northern Ireland, answered the referendum question "Do you think that the United Kingdom should stay in the European Community (the Common Market)?" with a "yes." Only the Shetland Isles and western islands were against the EEC [1975: *UK embraces Europe*]. Slightly over 67% of voters were for remaining in the EEC. England, Scotland, Wales and Northern Ireland (where voter turnout was the lowest), alike supported further

integration of the United Kingdom with the remaining eight member states of the Community.

David Cameron's pre-election promise addressed the increasing criticism of EU activities voiced by a group of conservative MPs who several years earlier demanded that the UK should leave the EU. Another thing worth bearing in mind is that the number of voters expressing their disapproval for the obligation to finance poorer member states continued to grow (Wilk-Reguła). Cameron's move seems to suggest that, apart from keeping his pre-election promise, his intention was to leave the decision about continued UK membership of the United Europe to its citizens, an issue that had been under public debate for quite some time. The declaration to hold a referendum kept recurring during EU talks and was also included in the manifesto of the Conservative Party in 2015 [*The Conservative Party Manifesto 2015*: p. 30]; it was also announced by Queen Elizabeth II in her speech of May 27, 2015 [*Queen's Speech 2015*].

Faced with a whole range of crises in the EU, British politicians raised the subject of leaving EU structures, thereby confirming their considerable distance from European integration processes and taking a tactical step in their relations with the EU. "Threatening" the EU with a referendum on continued membership, the British wanted other participants of integration processes to see the British, alternative picture of integration, the European Union, and, first and foremost, the position of the United Kingdom in the EU [Musiał-Karg, Lesiewicz, 2015, pp. 117-118]. It seems therefore justified to note that the British acted as a brakeman in the process of European integration impeding or obstructing unanimous decision-making of member states.

When the date of the referendum on continued UK membership of the EU was set for mid-2016 [*Unię Europejską czeka Brexit?*, 2015; "Independent": *Cameron zaatakuje UE*, 2015] it meant that for nearly a whole year European leaders would have to conduct complicated and multilateral (involving practically every member state) negotiations on the future format of European integration and the reform of the European Union David Cameron's government had called for [Korteweg 2015; *Unię Europejską czeka Brexit?* 2015; Stawiski 2015]. Given the ongoing financial crisis, the threat of Grexit and the related refugee crisis, the British referendum and its potential adverse outcomes posed a huge problem for the entire EU.

On June 23, 2016, the British went to the polls to answer the question "Should the United Kingdom remain a member of the European Union?" [*Wielka Brytania: rząd podał pytanie* 2015]. While voter turnout was high (72.2%), 48.1% (16.1 mln) of voters supported continued membership while 51.9% (17.4 mln) were of the opposite opinion. Citizens of Scotland and Northern Ireland opted for continued integration whereas citizens of England and Wales supported Brexit with 53.5% and 52.5% of votes, respectively.

The British decision stirred a number of economic, political and social controversies. The first ones emerged on the day of the referendum, when stock markets across Europe fell considerably, as did the exchange rate of the British pound (on Friday, in response to the results of the referendum, the British pound lost 8% against the dollar) [*Brytyjski minister...*, 27.06.2016]. As far as political consequences are concerned, the most significant one – apart from the United Kingdom being successively excluded from various areas of EU activities – involved

PM David Cameron's announcement to step down. The Conservative leader said he would quit as PM by October.

As a consequence of the referendum, David Cameron resigned as the head of government and was replaced by Theresa May, who in October 2016 stated that the United Kingdom would commence the procedure to exit the European Union by March 2017. It should be noted that the Brexit referendum revived Scottish ambitions to regain sovereignty. The Scottish government, headed by Nicola Sturgeon, has announced its intention to hold a new referendum on independence to allow Scotland to remain in the European Union. Therefore, Scotland may become a huge problem for the United Kingdom and impede the procedure of Brexit.

REFERENDUM IN HUNGARY

Joining the EU following their political transformations was among the priorities of the foreign policies of the newly emerged democratic states in Central and Eastern Europe. Accession to the EU was therefore commonly considered an important issue that did not address individual interests, but rather concerned the future of all citizens and generations to come.

The accession referendum in Hungary was the third one to be held before the central and eastern enlargement of the European Union planned for May 2004. The question submitted to the vote read: "Do you agree that the Republic of Hungary should become a member of the European Union?" The accession referendum was subject to the general rule stipulating that the results are binding provided that at least 25% of eligible voters choose one of the options. Since 45.62% of eligible voters cast their vote, and 83.76% supported accession to the EU, the validity requirement was met (cca. 38% of the votes were for accession) [Musiał-Karg, 2008, pp. 255-266; Rytel-Warzocho, 2011, pp. 170; Podolak, 2014, pp. 254-255]. It should be noted here that voter turnout in Hungarian referendum was the lowest (considerably lower than expected) among all the accession referenda held at that time. According to a poll conducted shortly before the referendum, 64% of Hungarians declared their support for integration while 16% were against. Voter turnout was forecasted to amount to 60-70% [Sochacka, Żelazo, 2003].

Another referendum on the European Union issues was held in Hungary on October 2, 2016 on the topic of refugee resettlement. This vote was the outcome of the September 2015 decision made by the EU member states to relocate 160,000 immigrants who entered Greece and Italy to other member states over a period of two years. The participation in the resettlement program was deemed to be obligatory, with every state having been allocated a number of refugees to admit.

According to press releases from the beginning of 2015 cca. 1,000 immigrants entered Hungary every week, mainly from Serbia and Hungarian police detained ca. 67,000 illegal immigrants [Orban broni plotu..., 2015.07.01]. As a consequence, on July 17, 2015, the Hungarian government decided to close the green border between Hungary and Serbia and put up a 4m tall fence of 174km in this section. This temporary fencing off was justified with the need to observe EU requirements and protect the external border of the Schengen zone from illegal immigrants from the south. Viktor Orbán did not rule out the possibility that a wall might be erected

between two member states of Schengen zone – Hungary and Croatia [*Orban nie wyklucza budowy...*, 2015.09.03].

Next to Grexit and Brexit, the immigration crisis has recently posed the greatest challenge to the European Union. This crisis can surely be described as a stimulus to “reinforce internal solidarity and responsibility, and to intensify aid offered to the states facing the greatest risk of the influx of immigrants” [Adamczyk, 2016]. After the decision taken in September 2015 by the European Union Council [*Konkluzje Rady w sprawie ...*], followed by the decision of February 2016 [*Rada Europejska (18–19 lutego 2016)...*] on possible solutions to the immigration crisis, more and more voices could be heard saying that EU member states are not prepared to implement the activities planned. These decisions (and in particular the establishment of a permanent crisis relocation instrument for all member states) aroused opposition against admitting immigrants in some countries. Such resistance was particularly stressed by Hungary, the Czech Republic, Slovakia and Romania, whose delegates voted against the decision to relocate refugees in EU member states at a session of the Justice and Home Affairs Council on 22 September 2015. Unlike Poland and the Baltic States, which were also among the leading critics of the obligatory refugee quotas, Hungary, the Czech Republic, Slovakia and Romania demanded that decisions concerning the quotas were made on the basis of voluntary declarations by individual EU member states by the end of negotiations [Gniazdowski, 2015].

The states that were against the decisions made by the EU Council wanted, first and foremost, to strengthen the EU borders and curb the influx of immigrants. They believed that only after these priorities were achieved the issues of quotas should be discussed. “In the states that oppose the obligatory quotas to be allocated the migration crisis is the main topic of public debate and almost all political circles have backed their governments’ standpoints.” In Hungary, PM Viktor Orbán criticized “German moral imperialism as concerns the migration crisis” on September 23 [Stasik, 2015] and stated that “the EU should develop a special partnership with Russia and Turkey, who are crucial for the crisis to be resolved” [Gniazdowski, 2015].

The immigration crisis has revealed problems with maintaining solidarity and responsibility inside the EU, and on account of the referendum held there Hungary has become a symbol of protest against EU policies adopted to solve the crisis.

The government of Viktor Orbán initiated a referendum where voters were to answer the question “Do you want the European Union to be able to prescribe the mandatory settlement of non-Hungarian citizens in Hungary even without the consent of the Parliament?” For the referendum to be valid, voter turnout had to amount to at least 50% of the 8.27 mln of eligible voters. This election threshold should be considered to be extremely high given the fact that voter turnout exceeded 50% only in two out of seven referenda held after 1989 (in 1989 and 2008). Even the participation in the above-mentioned symbolic referendum on accession of 2003 was lower than 50%.

Examining the attitude of political parties to the referendum question, it should be noted that the Hungarian government encouraged citizens to vote “No,” combining immigration issues with the increased terrorist threat in its campaign. An opposition party, Jobbik, also encouraged answering the referendum question in

the negative, whereas the Hungarian Socialist Party, alongside several other parties, called for boycotting the referendum or casting an invalid vote. The Hungarian Liberal Party was for the solution proposed by the EU, as it declared its support for an open and united Europe [Pawlicki, 2016.09.30; Sadecki, 2016.10.04]. The most serious opposition of the FIDESZ party and the Prime Minister during the referendum campaign was offered by “the least serious opposition group – the satirical Two-tailed Dog Party (MKKP)” which encouraged citizens to cast invalid votes in the referendum. This party ridiculed the governmental campaign before the referendum and disseminated guidelines on 101 ways to cast an invalid vote in social media [Pawlicki, 2016.09.30].

The Hungarian PM, Viktor Orbán, frequently stated that the referendum would aid his efforts to tighten EU immigration policies. It seems, however, that he must have realized how difficult it would be to achieve the required voter turnout of 50%, as he kept remarking that the referendum would evidence whether the Hungarian society is a true community.

As announced, the government-initiated referendum took place on October 2, 2016. Given the results of the Brexit referendum and the unresolved migration crisis, the entire European community was watching the developments in Hungary and the results of the referendum there. 41.32% valid votes were cast, 98.36% of which said “No” to the referendum question. Only 1.64% of valid votes were for the quotas [National Election Office, 2.10.2016]. Although the referendum was invalid, the PM Viktor Orbán announced that amendments would be made to the Constitution on account of the desires of the majority of referendum participants who expressed a clear standpoint on the matter in question.

From the point of view of the whole European Union and individual member states, the second referendum, organized over a very short period of time in an EU member state, was a highly significant and carefully scrutinized event.

The Hungarian referendum, held shortly after the Brexit referendum in the United Kingdom, was another vote that produced a serious social schism. The Hungarian referendum was the only popular vote on the issue of immigration quotas held in the European Union which was deeply divided by the immigration crisis. Orbán based his referendum campaign on populist and xenophobic language where refugees were identified with terrorists. The fear of “refugees provided fuel to all kinds of populists. If this Hungarian experiment succeeds, extreme right-wing and populist parties in Europe will gain a strong argument in favor of closing borders. Eventually, the fundamental EU principle of unity, under which member states share not only power and prosperity but also challenges and problems, will be undermined” [Pawlicki, 2016.09.30].

The analysis of the context of the Hungarian referendum that Orbán based on social fears of uncontrolled migration shows that its main purpose was to reinforce the Prime Minister’s position in EU structures. Before the problem of the influx of illegal immigrants to the EU intensified, Viktor Orbán had little influence on EU policies. Initiating the referendum, he tried to impose a certain tone and direction of debate in the EU clearly manifesting his protest against Hungary admitting refugees to its territory. “Brussels must be stopped. We can’t allow them to force us (...) to import the bitter fruits of their mistaken immigration policies. We don’t want to and won’t import crime, terrorism, homophobia and anti-Semitism into Hungary” said

Hungarian PM [*Orban o UE: nie przyjmujemy...*29.02.2016]. The language of the government translated into social attitudes. According to a survey² conducted by Pew Research in spring 2016, 82% of Hungarians believed that refugees take away jobs and benefits, and 76% of respondents said that refugees increase the terrorist threat [*Europejczycy: uchodźcy...*, 12.07.2016]. It should be noted that the opinions of respondents to this survey in a majority of countries examined were similar to those in Hungary. In Hungary, Italy, Poland and Greece over half of respondents had negative opinions about Muslims (72% in Hungary and 66% in Poland). The least negative opinions were recorded in Great Britain, Germany and France (28-29%). In all the countries examined, people who declared right-wing attitudes were more prone to negative opinions about Muslims; they expressed greater concern with the influx of refugees and were against social diversity. Interestingly, the smallest proportion of opponents to social diversity was found in Great Britain, Sweden and Spain, where over 30% of respondents said that their countries are improving on account of diversity [*Europejczycy: uchodźcy...*, 12.07.2016].

OUTCOMES OF THE 2016 REFERENDA – FINAL CONCLUSIONS

The considerations presented in this paper make it possible to draw the following conclusions on the outcomes of the British and Hungarian referenda held in 2016, as well as on the role of referenda for the process of European integration:

- firstly, the results of both the British referendum on Brexit and Hungarian referendum on immigration quotas should be interpreted as symptomatic of the increasing difficulties the EU is facing when agreeing on a joint standpoint on matters that are crucial for it;
- secondly, the British referendum, which resulted in the decision that the United Kingdom should leave the European Union, is a historic referendum, both for the British, who after 43 years decided to withdraw from the process of European integration, and for the EU, whose sense has been questioned by one of the most “difficult” participants of the European project. The British referendum was the first national vote that demonstrated society’s negative approach to continued integration with the EU so clearly. Before that, negative referenda results in other countries pointed to a lack of agreement on selected issues that were not directly related to membership as such (for instance, the Euro, the Nice and Maastricht treaties, and so on). The British referendum was the first one (except for that in Greenland) to express a negative attitude of sovereign nations, thereby plunging the EU into a greater and more comprehensive crisis. Taking into account the future relations of the United Kingdom and the European Union, it should be pointed out that after the British commence the exit procedure, the process of formal departure from EU structures is going to take several years at least, and the whole procedure will be exceptionally time-consuming and complicated; the common interests of the EU and UK will have to be negotiated on practically every topic;
- thirdly, although the Hungarian referendum turned out to be Orbán’s defeat to some extent, it may bring far-reaching consequences in the form of a wave of

² The survey was conducted in April and May 2016 in Poland, Germany, Sweden, the Netherlands, Great Britain, France, Spain, Italy, Greece and Hungary.

protest from other EU member states towards the European foreign policy (in the context of the refugee crisis). The referendum was intended to ensure the Hungarian PM's strong position in the EU, making his voice on the issue of refugees louder. Although it is difficult to forecast such a result only one month after the referendum, it is not unfeasible. If the Hungarian government manages to introduce a constitutional provision that Hungary will not admit any refugees (aiming to invalidate the decision by the EU summit of September 2015), the European Union could initiate the explanatory procedure with respect to Hungary;

- fourthly, the analysis of the history of European integration demonstrates that referenda seem to be a significant instrument, applied to make decisions on difficult, complicated matters that politicians feel uneasy about, and the process of European integration has long been (starting in 1972) a topic left to be decided about by societies in many countries. On the occasion of referenda held on EU treaties, it was oftentimes discussed whether the matters stipulated in the treaties should be left to citizens of EU member states. The practice of holding referenda has demonstrated that, in the case of several referenda that brought negative results, they were repeated after some time (two Irish referenda on the Maastricht Treaty, Nice Treaty and Lisbon Treaty) yielding different results. Shortly before the British referendum of June 23, 2016, there emerged opinions that another referendum on the same issue should be held. Their advocates called for the government to introduce a provision that would require another referendum to be held if the number of votes cast for one of the answers was lower than 60% and voter turnout was lower than 75%. An internet petition to this effect that had been signed by 4.1 mln people was rejected by the British government;

- fifthly, the use of nationwide referenda both in the UK and Hungary can be approached as a tactical move by each government, desiring to exert pressure on the EU with respect to immigrants, among other things. The threats of a referendum on the potential exit of the UK from the EU have always raised concerns of other member states and EU leaders about what the process of European integration would look like after. "It was clear that one state giving up its membership of EU structures could start a domino effect. This in turn could undermine the sense of continued intensified cooperation in Europe" [Musiał-Karg, Lesiewicz, 2015, p. 126]. In the case of the Hungarian referendum, its positive and binding results could be used by other governments manifesting different opinions (or protesting) about EU policies, and an incentive to submit the issue of admitting refugees to a popular vote. Given the current problems of the EU, the risk that such decisions would be negative seems greater than in the past.

Concluding, it should be emphasized that nationwide referenda are a popular way to make decisions on European integration. Although such votes are frequently consultative and non-binding, the governments of individual states declare that they would respect the desires of their citizens and make decisions conforming to them. Although a majority of votes on European matters have typically facilitated expansion and deepened cooperation within the EU, the 2016 referenda offer an

example of the UK and Hungary “turning their backs” on the EU and the principle of united implementation of EU policies. Both referenda have become a component of debates about the need to change the European Union on the one hand and a crucial stimulus to apply concrete strategies to implement some vision of the future EU development and overcome crises (such as Brexit and its aftermath, and the refugee crisis) on the other.

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SILVER ECONOMY – OPPORTUNITIES AND CHALLENGES IN THE FACE OF POPULATION AGEING

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Abstract

The process of population ageing has a significant impact on changes in many aspects of life and is a major challenge for social and economic policy. The ageing of the population is often seen through the prism of increasing social expenditure (including pensions) and thus as a threat to public finances. However, we should pay attention also to the other side of the issue and treat this process in terms of chances and opportunities related, among others, to better health, lengthening of the period of professional activity and the development of the market which focuses on increased demand for products and services for seniors. Older people not only because of the purchasing power but mainly due to better living conditions and education become more desirable and valued consumers not only in the area of health and care services, but also e.g. on the market of cosmetic, banking products, and those related to spending free time (culture and recreation).

Key words: ageing of population, economy of ageing, silver economy

THE SPECIFICITY OF THE DEMOGRAPHIC AGEING OF THE POLISH POPULATION IN COMPARISON WITH COUNTRIES OF THE EUROPEAN UNION

The increase in the share of the elderly in the populations of Western countries permanently burgeons; representatives of many scientific disciplines perceive the challenges associated with it. In 2060 almost one third of the European Union population will be over 65 years old (their share will rise to almost 30%, while in

2010 it was 17.2%). Also, at this time, the share of the oldest old people, i.e. aged over 80 years, will increase significantly (from 4.6% to 12%).

Table 1. The share of 65+ people in populations of European Union countries in the years 2013–2060

Country	13-60	2013	2020	2025	2030	2035	2040	2045	2050	2055	2060
Belgium	6.0	17.7	18.9	20.0	21.3	22.1	22.5	22.6	22.8	23.1	23.7
Bulgaria	12.3	19.4	21.7	23.1	24.3	25.6	27.2	29.0	30.2	31.6	31.7
Czech Rep.	11.1	17.1	20.2	21.4	22.3	23.0	24.7	26.7	27.5	28.1	28.2
Denmark	6.6	18.0	20.0	21.1	22.4	23.4	24.0	24.0	23.6	23.8	24.6
Germany	11.3	21.0	23.2	25.2	28.1	30.6	31.2	31.5	31.8	32.4	32.3
Estonia	11.7	18.2	20.6	22.6	24.3	25.5	26.8	27.7	28.8	30.2	29.9
Ireland	9.0	12.4	15.0	17.1	19.4	21.4	23.1	24.5	24.9	23.4	21.4
Greece	12.7	20.3	22.1	23.8	25.8	28.4	30.7	32.7	33.9	33.7	33.0
Spain	12.1	17.9	20.1	22.4	25.3	28.2	31.0	33.1	33.3	32.0	30.0
France	7.1	17.8	20.3	21.8	23.2	24.4	25.2	25.2	25.1	24.9	24.8
Croatia	11.3	18.3	20.7	22.6	24.2	25.4	26.3	27.4	28.4	29.1	29.6
Italy	8.8	21.2	22.4	23.5	25.3	27.3	28.9	29.7	29.9	29.9	30.0
Cyprus	13.4	13.4	16.3	18.5	20.5	21.9	23.1	24.1	25.5	26.4	26.8
Latvia	9.2	18.9	20.7	23.1	25.5	27.0	27.9	28.0	28.3	28.9	28.0
Lithuania	7.5	18.3	20.7	24.0	27.7	30.1	30.8	30.0	28.3	26.9	25.8
Luxembourg	7.8	14.0	14.8	15.6	16.8	17.9	18.6	19.2	19.9	20.7	21.8
Hungary	12.1	17.4	20.3	21.6	21.9	23.0	24.7	26.9	27.6	28.4	29.5
Malta	11.0	17.5	21.2	23.3	24.4	24.5	24.8	25.5	26.4	27.5	28.5
The Netherlands	10.3	17.1	20.0	22.1	24.3	26.2	27.0	27.0	26.9	27.1	27.4
Austria	10.7	18.2	19.5	21.1	23.5	25.5	26.4	26.8	27.4	28.1	28.9
Poland	18.5	14.5	18.4	21.2	22.7	23.7	25.1	27.3	29.9	31.8	33.0
Portugal	14.9	19.6	22.4	24.5	26.8	29.1	31.6	33.7	34.6	34.6	34.6
Romania	12.5	16.4	18.9	20.5	20.8	23.2	25.1	27.0	27.8	29.0	28.9
Slovenia	12.1	17.3	20.6	22.9	25.0	26.7	27.9	29.2	29.9	30.0	29.4
Slovakia	21.9	13.3	16.9	19.5	21.6	23.2	25.5	28.5	31.3	33.6	35.2
Finland	7.0	19.1	22.1	23.4	24.5	24.8	24.4	24.4	24.7	25.2	26.0
Sweden	4.9	19.3	20.4	20.9	21.5	22.2	22.5	22.4	22.5	23.3	24.2
The UK	7.5	17.3	18.7	19.8	21.4	22.7	23.3	23.5	23.9	24.4	24.8
EU28	10.0	18.4	20.5	22.2	24.1	25.8	27.0	27.7	28.2	28.4	28.4

Source: *The 2015 Ageing Report. Economic and Budgetary projections for the 28 EU Member States 2013–2060* (2015) “European Economy” no. 3, p. 219.

In Poland in the years 2015-2025 the number of people over 65 years of age will increase from 6 million to 8.2 million, and their share will increase from 15.8% to 21.7% of the total population (by the middle of the century it will have risen by another almost 3 million people, while the share will have increased by 10.9 percentage points) [Rocznik Demograficzny 2015: 167]. In 2060 the share of the elderly in Poland will reach 33% and then it will be one of the highest in Europe (apart from Portugal – 34.6% and Slovakia – 35.2%, and on a par with Greece) [Europe in figures 2011: 117]. At the same time we need to add that over the coming years the global size of the Polish population will steadily decline – in 2050 it will amount to 33 million 951 thousand and compared to the state of 2015 it will be lower by 4.46 million (i.e. by 11.6%) [Prognoza ludności 2014: 109–112].

Poland is experiencing significant changes in the structure of the population in terms of economic age (at the beginning of 2015 – 18% of the population were persons of pre-working age, 63% were of working age, and 19% of retirement age) [Rocznik Demograficzny 2015: 163]. As a result of the occurring demographic processes (especially important is the ageing of the population), the so-called old age dependency ratio is systematically increasing (in 2014 there were 30 people of the retirement age per 100 people of working age, while in 2000 there were 24 persons), by 2050 the level of this ratio will have risen to 52 [Rocznik Demograficzny 2015: 165; Sytuacja demograficzna 2014: 41]. The main reasons for the rapid ageing of the population are a low fertility rate (1.29 in 2014), international migration of the population (especially young people) and the lengthening of life expectancy.

The progress of medicine and the improvement of the health condition are reflected in the decline of the mortality rate and the lengthening of average life expectancy [Trwanie życia 2013: 13]. A boy born in 2014 in Poland has on average a chance for 73.8 years of age, while a girl for 81.6 years (thus, when compared to 1990, men live longer by 7.6 years and women by 6.4 years). According to different variants by mid-century an average life expectancy will have been extended from 8.7 years to 11 years for men and from 6 to 7.8 years for women [Prognoza ludności 2014: 78].

Also, people over the age of 60 can statistically expect a longer life expectancy (19.2 years for men and 24.3 years for women) [Trwanie życia 2015: 16]. More and more often the parameter of years lived in good health is taken into account, considering the quality of life, and not only the length of it. In the European Union in 2013 healthy life years predicted at birth were estimated at the level of 61.4 years for men and 61.5 for women (in Poland it was respectively 59.2 years and 62.7 years). And a 65 year-old man lives in health in Poland on average for 7.2 and a woman 7.8 years (the average for the EU in this respect is, respectively, 8.5 and 8.6)¹.

We should also note a significant increase of the process of dual population ageing in the near future, meaning an increase of the number (to over 3.5 million) and share of the most elderly in the population from less than 4% to 10.4% in mid-century [Sytuacja demograficzna 2014: 37–38], and among seniors themselves (already in 2040 people aged over 80 will constitute almost 36% of the senior population, while in 2014 persons over 80 years of age accounted for less than 18% of the population of people over the age of 65 [Ludność w wieku 60+ 2016: 3]. We can add that about 64% of the oldest old people will be women. An upward trend in single-person households of the elderly (created mostly by women) is also visible, which in the coming years will probably deepen [Sytuacja demograficzna 2014: 14]. Everything points to the fact that by mid-century Poland will have become one of the countries with the most advanced population ageing process in Europe. The high number of old people will exert more and more clearly noticeable impact on expenditures connected with aid and healthcare, and generate other problems. An increase in care needs in Poland will be systematic and will intensify significantly after 2020 [Niesamodzielní 2010]. Given the growing group of elderly people and the

¹http://epp.eurostat.ec.europa.eu/statistics_explained/index.php/Healthy_life_years_statistics.
http://ec.europa.eu/eurostat/statistics-explained/index.php/Healthy_life_years_statistics#Main_tables [Accessed: 18.01.2016].

associated increased demand for care services and the shrinking working-age population, economists fear the multiplication of problems related to the financing of health care, and even destabilisation of public finances [Rudnicka, Surdej 2013: 4]. A significant increase in health care costs in the future is predicted, and those associated with ageing will have a special share in it [Proгноza kosztów 2015: 4]. This situation results in principle from the fact that health care costs are largely dependent on age – for example, in 2009 people over the age of 65 accounted for 26.3% of all patients treated in hospitals [Analiza wydatków 2010: 7], whereas in 2013 they constituted as many as 30.3% [Ludność 60+ 2016: 23]. While the average expenditures on treatment of one insured person in hospital treatment amounted to 643 PLN, in the group of people over the age of 65 they were already significantly higher (reaching the level of 1638 PLN per the insured) [ibidem: 12–13]. It is estimated (assuming constant prices of services in subsequent years at the level set in 2014) that in 2020 the global amount of health care costs will increase by 2.6 billion PLN (by 4.9%) compared to 2014, while further growth is forecast for 2030 – by nearly 6.4 billion PLN (12%) compared to the base year [Proгноza kosztów 2015: 8].

The growing share of old people and the above mentioned shrinking of the working-age population is often seen from the point of view of the social security system through the prism of falling inflows. It is, therefore, pointed to the fact that reduced possibilities of public systems will require a broader supplementation by private insurance, e.g. health one [Pustelnik 2010: 40–44; Fal 2014: 75]. Of course, there are many more challenges intensifying in scale over time. Let us consider, for example, changes taking place in the structure of families and processes related to migration and let us look at the ageing of the population in this respect. The fertility rate has not ensured simple replacement of generations for a long time, and adult children migrate for the purpose of work both at home and abroad, and thus they cannot help or look after their elderly parents. Even now it is considered to be a significant problem which will probably accumulate over the years. Thus, in this context, the sufficient quantity and quality of human potential predestined to provide assistance and care (welfare potential) seems to be one of the major challenges, and thus the need for staff training gains in importance. A key problem is also the appropriate orientation of both the functioning of the social infrastructure and the possibility of financing the growing needs in this regard.

It is, however, also worthwhile to look at the issue of the ageing of the population and seniors' live from a broader perspective from which another, a more optimistic picture emerges. It is important to note several processes which are significant in this context. It must be remembered, among others, that along with steadily lengthening life expectancy and improving conditions of life, as well as positive changes in the education structure, aspirations of older people increase multidirectionally [Osiński 2013: 5]. We must also bear in mind that seniors are not a homogeneous group, and being in different stages of ageing they are characterised by diverse needs in the life cycle. Therefore, we can recall at this point exemplary divisions into subgroups based on age (taking into account also the so-called period of the old age foreground): 50-60/65 years, 60/65-75 years and over 75 years of age [Golinowska 2014: 18]. In another classification disability positively correlating with more advanced age is indicated as the basis, i.e.: a group of 55-64 years (32% of the

disabled); 65-74 group (44%), 75-84 years group (60%) and the group over 85 years of age (70%) [Growing the 2015: 7].

The adoption of a healthy lifestyle inhibits (or delays) the development of certain diseases and social and medical progress contributes to the prolongation of life. Considerable successes in this respect were achieved in highly developed countries in the past decades. Now, the improvement of the quality of life in every stage (including old age) is increasingly pointed to. The focus is directed towards higher activity of the interested parties, namely seniors, in the context of investment in health and fitness. It is stressed, among others, in state documents strategic for the area of health "demographic challenges point to the need to undertake urgent measures aimed at increasing activity of older people and their families. A condition for further professional, social and economic activity of seniors and their loved ones is a good state of health and the highest possible level of independence of the elderly" [Policy paper 2014: 128–129].

The approach to population ageing as a demographic process also changes – from the analysis in terms of a threat to the public to perceiving it as a challenge [Szukalski 2006: 6–10]. Anyway, the fact is that in the future we will need to deal with serious tasks associated with the change of the structure of society in terms of age – and we should urgently focus on it and start preparing for it now. The transformations in question also result in the need for the participation of various stakeholders in developing and implementing concepts for better life in old age, ranging from issues related to the multi-dimensional activation of seniors to care for the sick and dependent. Apart from third sector organisations operating in this area [Leszczyńska-Rejchert 2005: 213–220; Turek 2011: 153–173; Dutkiewicz, Sobiesiak-Penszko 2011: 28–36; Kubiak 2015: 337–353; Kubiak 2016: 175–176, 193–194] attention is also drawn to the need for greater recognition of the involvement of private capital in order to achieve the highest development potential of the so-called silver economy [Rudnicka, Surdej 2013: 4]. There is a consensus that ageing populations are a key social challenge for Europe, but at the same time chances for creating new jobs and economic growth resulting from increased needs and demand from ageing people are pointed to. At the level of the European Union there is a belief that a coherent strategy for cross-sectoral cooperation within the community is required if the silver economy is to fulfil all expectations. In the conclusions it is highlighted that the public and private sectors must work together in order to support and encourage innovative solutions and research on the expanding silver economy. At the same time it is stressed that European economic operators are well placed to compete and even lead in this area in the global market, by offering solutions for the ageing population [European Summit 2015: 17].

THE WAYS OF UNDERSTANDING THE SILVER ECONOMY

The silver economy is most often defined as a market or economy of seniors and covers basically all economic activities aiming to meet the needs of an ageing population. Some suggest that the silver economy is synonymous with the concept of the silver market used already in the 70s of the twentieth century in Japan in the context of the increased availability of various types of facilities for seniors

[Klimczuk 2013: 465]. In turn, according to Marek Radvansky and Viliam Palenik the concept of silver economy means the adaptation of the economy to the future needs of the numerically growing group of people over the age of 50 [Radvansky, Palenik 2010].

Proponents of the silver economy as a growing sector of the economy associated with ageing and growing needs present it as an opportunity for development. Therefore, they propose to take appropriate steps for its dissemination [Wójtowicz 2014: 74]². It is noted that the silver economy can be seen in two ways. The first is related to showing the economy evolving towards the needs of the elderly population without special – intervention targeting. This means that companies see the numerically growing group of seniors through the prism of their increasing purchasing power and adequately adapt products and services to the preferences of older clients. In the other (wider) meaning population ageing and the silver economy are treated as a potential growth stimulus for the economy (focusing on the needs of seniors), subject to the increase (the participation of the stakeholders) of their activity and social integration, which translates into the improved quality of life of both themselves and society as a whole [Golinowska 2014: 19; Golinowska 2011: 76].

According to Piotr Szukalski, the basis of a potential success of the silver economy is the concept of active ageing, based on the conviction about the need to influence the longest possible maintenance of the social productivity of an individual (every activity which brings benefits to any member of society, regardless of being carried out professionally (for a fee) or not [Szukalski 2014: 33]. It leads to thinking about potential customers in terms of not only individuals but also groups or organisations, and fulfilled needs are not so much the needs of seniors but of structures dealing with seniors. From this perspective, not only the elderly become the focus of attention, but also those at the old age foreground, and one of the important fields of activity is the provision of services that allow further activity, e.g. the continuation of a professional career by older employees [Szukalski 2012: 7]. At the same time it should be added that the existence of the silver economy is possible only in demographically (i.e. characterised by a high percentage of seniors) and economically mature societies. What is more, one of the drivers of changes are ageing entrepreneurs who, as a rule, are the first to sense the potential of senior citizens as consumers, the potential dormant under prejudices and stereotypes associated with old age and elderly people [ibidem: 8].

According to Carollin Eitner, Peter Enste, Gerhard Naegele and Vereny Leve some of the most prospective segments of the development of the silver economy are:

- the application of information technology (IT) in hospital and outpatient treatment;
- prudent life, adaptation of housing and services making life easier, with the use of IT;
- promotion of independent life with the use of IT at the municipal level;

² In Europe, significant promotional activities in favour of the silver economy are ascribed to Armin Laschet, a MEP and a Minister for generations, family, women and integration in the regional government of North Rhine-Westphalia.

- the areas of gerontology important for health economics, including medical technologies and e-health, in support of hearing and sight, prosthetics and orthopaedics;
- education and culture (in "response" to the growing level of education and a greater amount of free time);
- IT and the media particularly in combination with medicine and other market segments like health (in the context of promoting) independence and security;
- robotics of services combined with the promotion of self-reliant life for older people with serious health limitations;
- mobility and its promotion e.g. traffic safety;
- leisure, travel, culture, communication and entertainment;
- fitness and wellness in response to a higher level of health consciousness in particular of the "young old";
- apparel and fashion (among others in the pursuit of social integration);
- services aiming at facilitating everyday life and household chores;
- insurance, especially relating to risks associated with old age;
- financial services "sensitive to demographics", especially in the sphere of protection of capital, sufficient means of subsistence and consultancy in management of possessed funds [Eitner, Enste, Naegele, Leve 2011: 315].

The social meaning of the silver economy consists in meeting the needs and aspirations of the ageing population, respecting both the need for further participation in social life, as well as the weakness of the elderly (requiring compensation and support). This element is included in the trend of improving the quality of life of seniors, paying attention to the increase in the diversity of the population of seniors against different health status, education and lifestyle, constituting their social security. The economic meaning of the concept of silver economy consists in showing benefits which are connected with demand factors on the part of seniors, i.e. purchasing power and consumption (with significant potential for growth), and also supply-side factors represented by them (longer work, higher qualifications, experience and life stability) [Golinowska 2011: 84]. Peter Szukalski claims that "the concept of silver economy is understood more and more widely as the entirety of activities undertaken by various entities targeted not only at the elderly, but also towards institutions/organisations whose customers/employees such people are, and more often the target group is not defined by reference to some age departing into old age, but by referring to the life cycle and the necessity to prepare for the old age phase" [Szukalski 2012: 10].

THE DEVELOPMENT AND IMPORTANCE OF THE SILVER ECONOMY IN THE EUROPEAN UNION

The attachment of great importance and at the same time hopes to the silver economy can be seen in initiatives and documents of the European Union. A series of thematic conferences "Silver Economy in Europe" turned out to be significant. It was launched on the initiative of the government of North Rhine-Westphalia with a meeting in Bonn in 2005 during which the so-called Bonn Declaration was adopted. In accordance with its provisions the active preparation of the economy for the new demographic ratios is an opportunity for the improvement of the quality of life,

economic growth and competitive Europe. Thus, the policy of development of the senior generation in the silver economy model includes: promoting learning throughout life (lifelong learning), the increase of their professional activity, the use of their intellectual potential and experience and enhancing intergenerational solidarity. On the other hand, the development strategy within the silver economy includes adapting EU countries' economies to changes in the demographic structure of the population by raising awareness and building knowledge about the opportunities of the ageing population, an increase in support for the activities of industry and services focused on the development of the economy taking into account an increase in the needs of the older population [Memorandum 2005]. Seven European regions (North Rhine-Westphalia, Extremadura, Gelderland, Limburg, Limousin, Mid-East of Ireland, and North-West England) proclaimed the constitution of Silver Economy Network of European Regions – SEN@ER³. Next conferences were held in Maastricht (2006), Seville (2007) and in Limousin (2010). During all these meetings the attention was focused on similar issues oscillating around ways to encourage enterprises and institutions to cooperate as well as to develop and implement new products and services for seniors. The key points were: new technologies, independence, self-reliance of life, as well as culture and tourism, nutrition and financial services.

The term "silver economy" appeared, among others, in a Resolution of the European Council [Opportunities 2007: 21] which stressed the importance of older people for the economy and society and the need for their activity, and also indicated the chances of increasing competitiveness and growth potential of the European economy, and the creation of jobs thanks to meeting older people's growing demand for specific, specially tailored goods and services (the so-called "silver economy"). It stated also that the ageing of the population constitutes not only threats and challenges, but also a chance for economic growth, increased competitiveness and innovation, implementation of new services, production of new goods and, consequently, creation of new jobs, and this trend which must be popularised in the EU was termed the silver economy.

In the report *Europe's Demographic Future* of 2007 the European Commission underlined the growing potential and purchasing power of seniors (which translates into economic growth) and the necessity of development of the economies in this direction (with the recommendation of focusing on this market in various sectors of the economy). It stressed at the same time the lack of a ready pattern of the silver economy, defining it as "the combination of good supply conditions (high levels of education, R&D, responsive and flexible markets) and the growing purchasing power of older consumers which offers a huge new potential for economic growth" [Europe's demographic 2007: 96].

In 2011 the European Commission launched a pilot European Innovation Partnership on Active and Healthy Ageing constituting a part of the Innovation Union – a flagship initiative of the Europe 2020 Strategy. The partnership follows the overriding objective to increase EU citizens' average healthy lifespan by two

³ The co-operation network of several European regions was established at the conference in Bonn on 17-18.02.2005 which treats the population aging process in terms of challenges and opportunities for individual regions in terms of economic dynamics and competitiveness in Europe, <http://www.silvereconomy-europe.org>.

years by 2020. The implementation of this objective is supposed to bring Europe a number of benefits, including, among others, the improvement of health and the quality of life of older citizens, support for the sustainability and efficiency of social care systems, the increase of the efficiency and competitiveness of EU industry through economic activity and expansion into new markets. In the framework of the partnership various types of stakeholders (providers of health care and welfare services, big industry, small companies, research centres, advocacy organisations and public authorities) from all EU countries are involved in the implementation of over 500 innovative activities to improve health and welfare of the elderly. Gathered in 6 action groups they work together to share resources and best practices in the action areas which are the subject of their common interest, they identify actions that can be adapted to other European contexts and provide materials to inform and gain influence on the political agenda at the European and national levels. These areas include medical recommendations and adherence to medical plans; falls prevention, prevention of frailty and functional decline; promotion of integrated care, including remote monitoring at the regional level; development of interoperable ICT solutions; construction of age-friendly buildings and arrangement of age-friendly environment.

In August 2014 the European Commission organised in Brussels a meeting "Growing of the silver economy in Europe" to discuss the best ways of developing the silver economy in Europe on a large scale. The ageing of the population is a factor conditioning economic development due to the demand that exists not only in the health sector, but also in the field of entertainment, home automation, ICT equipment, financial products, etc. Enterprises invest in innovative products and services meeting the needs of older people, enabling them greater independence and well-being. This meeting was an opportunity to gather materials, to express opinions on areas of concern and proposals in four spheres (public market, consumer market, legal and regulatory framework and interoperability) which will contribute to the development of further actions at all levels, including at the EU level [Gomez 2014: 56].

In 2011 in conclusions [Ageing 2011] the Council asked the Member States and the European Commission to use the European Year for Active Ageing and Solidarity between Generations (2012) [Decyzja PE 2012] as an opportunity to strengthen the strategy for ageing in Europe and to promote the opportunities for economic growth and job creation resulting from the development of the so-called "silver economy", among others, in the health and social care sector, and thus to help to improve the efficiency and sustainability of public finances.

MANIFESTATIONS OF THE SILVER ECONOMY IN POLAND WITH SPECIAL EMPHASIS ON THE CARE MARKET

Experts and proponents of the silver economy argue that the older population in the future, also in the nearest future, is a different population from seniors of previous periods in terms of the social structure; it is better educated and more mobile, moreover lives in better conditions and in the world of universally available information. In the next few years seniors are likely to be much more active as workers, producers, and most of all – consumers. If this trend is to be universal we

need to be prepared for investments aimed at solutions oriented at and tailored to the elderly (taking into account the phase of their old age). For the group of younger seniors – a friendly working environment, friendly transport infrastructure and implementation of the balanced work-life work style in companies. For a group of retired seniors – building of custom homes and friendly local infrastructure. The existing trends: the development of large shopping and service centres, virtualisation of transactions require parallel solutions: local and smaller centres facilitating traditional services, shopping and contacts. For the oldest – regulations and solutions for both home nursing and social care, as well as stationary long-term services [Golinowska 2014: 20].

The demographic ageing of the European population may be an opportunity for the creation of a new kind of business related to care services for the elderly in Poland. The price attractiveness and a relatively high level of qualifications of medical and welfare personnel are indicated as a special advantage in this market [Rudnicka, Surdej 2013: 1].

Long-term care is organised by both public institutions, non-governmental organisations and private companies, and financed with taxes, insurance and savings. Public spending on long-term care is considerable – in 2009 in OECD countries it amounted to approximately 1.4% of GDP, while by mid-century it is expected to double (also expenditures of individuals and families will be increasing systematically – a growing share of the costs) [Nahal, Ma 2014: 128].

In the face of the demographic and financial challenges and certain changes of consciousness in relation to the centres of long-term care, "care centres for dependants become more popular and the perception of nursing homes changes, they are increasingly perceived as a place of guaranteed security and professional services which are difficult to ensure at home" [Ośrodku opieki 2015: 36]. Because of the situation (work, place of residence, finances) some families do not have and will not have the possibility to take proper care of their seniors – therefore the percentage of people accepting placement of an elderly person in an institution providing full-time care increases. In addition, greater popularity and social acceptance for such solutions in the countries of Western Europe influence this change of perception [ibidem: 23].

The data show that in Poland the number and share of people aged 65 living in stationary social welfare institutions increases (over the period 2011-2014 the increase to 46.27 thousand, that is by 8.66%, while the share in the total number of residents of these establishments increased from 41.8% to 43.8%) [Ludność w wieku 60+, 2016: 25]. From year to year more and more private nursing homes are created – in 2011-2014 their number increased by more than 82.6% (from 196 to 358), and the number of offered beds rose from 5.9 thousand to 11.4 thousand – by 92.3%, while the number of people benefiting increased from 4.9 thousand to 8.5 thousand (by 73%) [Świadczenie pomocy 2016: 40].

Large listed companies, among others from the insurance and construction industry, have begun to enter the business associated with care services and investment in nursing homes. The senior economy may help Poland to obtain a significant competitive advantage due to attractive pricing and a high level of qualifications of medical and welfare personnel. There is evidence to the fact that, on the one hand, busy children, often forced to mobility due to the nature of

professional activity and labour market requirements, will willingly subsidise their parents' pensions to provide them with good care, and on the other hand, those born during the baby boom in the 50s of the previous century do not want to be reliant on their children's care.

As the experience of many countries shows, the problems of the ageing population cannot be effectively solved by means of massive intervention of the government and huge public funds. It is worthwhile, therefore, to extend also the relationships and involvement of private capital in order to maximise the development of potential of the silver economy covering all economic activities aiming at meeting the needs of the ageing population.

For some time Poland has been seen as an attractive market for services for seniors from other countries – in particular from Germany [Ostruszka 2013]. It turns out that in Poland a standard of care close to the German one is connected with significantly lower costs, and therefore everyday life is ultimately cheaper [Brzeg-Wieluński 2013: 21]. Furthermore, Germans have a different style of living their old age from Poles, i.e. only 8.4% of seniors live together with their children there, while in Poland it is now 31.6%. However, in accordance with these trends, it is likely that Poland will get closer to Germany in this respect, especially in view of the increasing scale of mobility and changes of the residence place of children of old parents.

Both some Polish companies and foreign investors are interested in the commercial market of care for seniors (e.g. Anderson Holding planning to invest 80 million Euro in 40 establishments by 2020) [ibidem: 21]. Examples of development in this area are already visible on a large scale.

At the end of 2015 in a comprehensive senior centre "Angel Care" in Wrocław an example of a protected apartment for the elderly (one of 50) was presented, and in April 2016 a senior centre was opened (the investment cost 50 million PLN)⁴. The investor is a developer group Angel Poland Group (together with MD-Nursing – an operator of care centres for the elderly), and the centre in Wrocław is a model for the next ones which will be built within five years in 10 locations (the group intends to create and operate approximately 1,800- 2,000 beds)⁵.

Already in 2013 a company Enel-Med presented a similar strategy of development announcing the involvement in the long-term care market. A beginning of a series of investments was a house for seniors in Głucholazy (Opole province), and by 2020 the company plans to build 10 facilities which the company wants to "fill" mainly with seniors from Germany. The construction of houses for the elderly is to be funded with the means coming from a German investment fund Planet Investment Group (apart from the financing of the investment it is also supposed to take care of providing a stream of patients)⁶.

In turn, MEDI-system is Poland's largest network of centres of stationary rehabilitation and long-term care offering both commercial beds and those financed by the National Health Fund. The trade investor and new owner of 90% of the

⁴http://www.rynekseniora.pl/inwestycje/107/wroclawskie_centrum_seniora_angel_care_ofi_cjalnie_otwarte_zobacz_zdjecia,5319.html [Accessed 5.05.2016].

⁵http://www.rynekseniora.pl/inwestycje/107/angel_care_zaprezentowalo_mieszkanie_pokaz_owe_dla_seniora_zobacz_zdjecia,3686_1.html [Accessed 8.02.2016].

⁶http://www.rynekseniora.pl/rynek_opieki/105/rozwadowski_wchodzimy_w_opieke_dlugoterminowa_bo_interesuja_nas_wyzsze_marze,3678.html [Accessed 8.02.2016].

shares is ORPEA listed on the stock exchange in Paris (a European market leader for long-term care and stationary rehabilitation) and 10% of the shares are owned by the founder and perennial president from Poland. The company focuses on stationary rehabilitation and long-term care providing medical and care services in a number of modern facilities in Poland. The care-medical facilities have rehabilitation units as well as units for patients with dementia⁷.

Also, the market of telecare and rehabilitation for seniors – remote health – has a promising future [Harańczyk 2014: 49–53]. It concerns mainly so called technologies assisting the elderly, improving their quality of life, promoting activity and independence (i.e. products such as portable personal alarms (enabling connection to a monitoring centre in case of emergency), telemonitoring of health and activity (e.g. the detection of falls, recording of selected physiological parameters and transmission of the results to the centre), home systems, smoke detectors, detectors of motion, temperature, gas, fire alarms [Duplaga 2011: 147–152]).

In the strategy *Information and Communication Technologies for Ageing Well* the European Commission draws attention to the potential of information and communication assistive technologies intended for the elderly. In documents describing the strategy it is estimated that the market for services related to the so-called smart home will increase over the years 2005-2020 from 13 to 37 million potential customers. Such solutions contribute to savings associated with a reduction in the number of physician office visits, hospitalisation period as well as lower costs of long-term care [Overview 2009: 3–4].

SENIORS' PURCHASES

The increasing potential of older people as consumers becomes more and more visible. According to research of GfK Polonia, already in 2010 the purchasing power of about 4 million households led by people aged over 60 amounted to approximately 150 billion PLN. Even then the group of these people had a 23% share of expenditures on chemical products and food, and in many categories (e.g. dairy products, tea, coffee, and chocolate) accounted for over 30% of the market. Pharmaceutical companies and pharmacies try to attract older consumers for which they are important customers, therefore numerous promotions, discount cards and loyalty programmes – already operating for a relatively long time and with a good effect – are less and less surprising. The offer of preparations (para-pharmaceutical products) for seniors and the cosmetics market also develop. From a business perspective it is something worth fighting for, taking into account, for example, the fact that consumers from this group buy every third care cream. Hence, virtually each of the major cosmetic companies on the market has in its offer products targeted at women aged over 60 – often advertised by mature celebrities [Mazurkiewicz 2010].

Loyalty programmes for seniors (loyalty cards, stickers, etc.) have become a regular part of trading strategies of supermarkets and hypermarkets which have quickly noticed how profitable it is not only to capture, but above all to "attach" and to

⁷ <https://www.medisystem.pl/pl/osrodki/> [Accessed 8.02.2016].

inure a customer (especially an elderly one) to their signboard. In a similar way, mobile phone operators offer seniors special packages for conversation and more convenient telephones (equipped with e.g. an alarm key, a torch and other gadgets useful for older people). Specialty shops, both stationary and websites, offering specialised rehabilitation equipment, blood pressure monitors and other accessories also operate successfully.

The banking sector also notices seniors regarding them as a conscientious group of actual and potential customers by offering various loan promotions⁸. The elderly belong mostly to groups with relatively low debt, and in highly developed countries seniors have relatively considerable capital playing the role of a "safety cushion" in case of unforeseen life circumstances according to the assumption that "forewarned is forearmed". Thus, they are relatively characterised by generally greater caution and are less prone to risk (possession of some reserve funds in connection with the uncertainty of tomorrow). It is emphasised at the same time that they save respectively mainly in the form of bank deposits and bonds (however, are sceptical of less known products of the financial market, e.g. investment funds and shares) [Rytlevska, Kłopocka 2010: 59–63].

In the majority of cases old people in Poland have a regular income [Kubiak 2014: 150; Kubiak 2016: 217–223], and as evidenced by the analysis of the relationship between consumption and savings, the stability of income in the long term favours the increase of consumption (and reduces the propensity to save). Not surprising, therefore, is the growing mutual interest – of seniors in consumer loans, and of banks in seniors as desired customers [Golinowska 2014: 23], fuelled by properly constructed "incentives" and advertisements.

It can be added that if commercial offers directed to seniors are to be more effective they should be characterised by certain specificity. Therefore, it is emphasised that "marketing messages dedicated to the elderly must take into account strong polarisation between the ways of reception of a message among representatives of particular generations. An example may be different values appreciated in advertising messages. Older people appreciate in particular the references to family, tradition and a stronger emphasis on the information and emotional side than the abstract-visual one" [Bałandynowicz-Panfil 2013: 117]. The way of representing seniors in advertising messages (especially on television) is contained in various forms and is multi-dimensionally analyzed [Ginter 2012: 197–208; Ginter 2013].

Seniors are a relatively difficult "object" of marketing – more difficult than younger people – among others because the susceptibility to suggestion decreases with age, the elderly rarely operate under the influence of a stampede. However, if the elderly are properly encouraged they quite willingly change the products purchased so far – it turns out that they have much less brand loyalty than is commonly believed. In old age, quality of life is much more important than wealth, therefore e.g. a strategy of presenting products and services as something improving seniors' comfort of living, as well as providing them with new experiences is well suited [Bombol, Słaby 2011: 122; Dychwald, Penfold 1998: 244–245].

⁸ <http://www.egospodarka.pl/56304,Seniorzy-lubia-kupowac,1,39,1.html> [Accessed 9.02.2016].

Before our very eyes, seniors' values and ways of market behaviour are undergoing dynamic changes. As Łukasz Jurek notes, we are witnessing a specific transition, during which a "traditional senior" is being transformed into a "modern senior". But one must have in mind that this is a heterogeneous community which can be divided into two groups. On the one hand, there are the so-called young old experiencing their second youth, not working professionally, without loan liabilities (any longer) (pertaining e.g. to housing), who, after their children have become independent, are in the phase of an empty nest, and their relatively good physical and psychological condition allows them to realise their life plans and passions (high amount of free time, relatively high disposable income – in relation to other periods of life). These are particularly important customers for the tourist, financial and healthy food industries.

The other group is made up of the oldest old persons: the most critical events for them occurring at that time are the loss of functional efficiency and the death of the spouse. Due to poor health and loneliness such people are an important target group for providers of health and care services, as well as for all service providers in their place of residence (cleaning, shopping on the phone, catering with delivery) [Jurek 2012: 157, 165–166]. Particularly large growth potential in this area is seen in telemedicine and telecare services directed to seniors which allow them to contact a doctor and monitor the state of health (apparatus and remote measurements), enable the exact location of the person (e.g. in the case of getting lost, straying) and fast intervention in life-threatening conditions.

CONCLUSIONS

Prospects for the silver market in Poland are evaluated rather optimistically. Positive conclusions are drawn, among others, on the basis of: the increase in the number of older people and their participation in the market as consumers; the systematic growth of their wealth and social processes related to family life (educated residents of large cities, with few children or no children, are at present and will be in the future most likely to benefit from offers of the silver economy); mental changes among seniors who to a lesser extent will expect to be taken care of by their family – and therefore fewer of them will be willing to save in order to bequeath their property to the next generation (at the same time to a greater extent they will be focused on enjoying life in old age – especially at the beginning of its stage – striving to implement earlier plans). This transformation will be supported by further raising of seniors' level of education and the improvement of their health correlating positively with the lengthening of the consumption period [Szukalski 2012: 9]. It is worth noting that persons aged 65 can expect to live in good health less than half of their future life, while in the period of about a quarter of the future life their ability to perform usual activities will be severely limited due to health reasons. In 2010 men in Poland lived in health for 58.5 years (i.e. 81% of the whole life), and women for 62.2 years (i.e. 77% of the whole life) [Wojtyniak, Stokwiszewski, Goryński, Poznańska 2012: 45].

The realisation of the vision of seniors who are better educated, more mobile, living in better conditions requires, however, a number of adjustments, among others, in relation to the age phase. For example, in relation to professionally active younger

senior population – adequate working conditions, proper adaptation of housing and facilities for the elderly, and for the oldest old – adjustments related to the functioning of care and nursing [Golinowska 2014: 20].

According to the assumptions of the senior policy in Poland, activities of both public administration at various levels, as well as other organisations and institutions carrying out tasks and initiatives creating conditions for dignified ageing, should aim to ensure that ageing is more healthy and active [Założenia 2014].

Innovative medical technologies can contribute in the future to the reduction of the cost of care for the elderly, especially those who due to their general condition and multidisease exhibit significant disability and require support from the welfare and health sector, engaging the human factor. Care services are divided into nursing services and administrative services, that is help in running the household (in daily chores such as cleaning, cooking, shopping and others). Currently, these services are often provided by family members or relatives as well as neighbours and friends. However, when one of these groups is not able to render the services necessary for the functioning of the elderly person (those that do not require specialised training), it gives many people a chance to work, as well as the need for services required in the local community [Perek-Białas 2013: 74].

Employment opportunities in the care for older people are one thing, other sectors of potential growth of activity and employment are: construction and housing, health and quality of life, as well as tourism and recreation for seniors treated in terms of interesting leisure activities, social inclusion and particular gerontological prevention [B. Zięba-Kołodziej 2014: 80–81].

Although prospects for the development of the silver economy are positive, as stressed by Krystyna Zimnoch, "the development of the silver economy requires the awareness of preparation for ageing of individuals, groups, institutions, entrepreneurs, customers and employees", which has the hallmarks of a process spread over many years [Zimnoch 2013: 30].

Older people cannot be considered unable to work just because they have reached certain age; therefore, another sphere is employment of seniors. The labour market and shortages of people willing to work will gradually require from employers investments in facilities related to the increase of operational readiness of seniors and implementation of age management (referring in fact to the management of the ageing process of employees through state policy or collective bargaining). It focuses on introducing a variety of measures including increasing the activity of the elderly, which some companies already implement – while offering good practice in this matter [Tubielewicz 2014: 41–52]. However, the development of this system on a large scale requires above all a deeper change in the mentality of executives, because as of now older employees are evaluated by managers (often on the basis of stereotypes) – less favourably than younger people. On the one hand, they value the knowledge and experience, while on the other hand, they complain about the low level of ability to use modern technologies, adaptability to change and flexibility in operation [Richert-Każmierska, Ziółkowski 2014: 53–65].

The state of economy is conditioned by many factors, and one of them is the demographic situation, including ageing of societies. In the current era this process should be analyzed in conjunction with other phenomena such as globalisation, the need to improve skills, and changes of the nature of labour and growth in demand

for information and communication competence. These trends determine the opportunities for growth and innovativeness, ultimately shaping the character and nature of future economies and societies. Older people will be both the subject and object of occurring changes. We should remember that the stimulation of societies to adopt the attitude of "active ageing" brings benefits not only to those directly involved in it, but it can be a source of growth and innovation.

It is very likely that in the future the structure of demand will undergo significant changes in the direction of a higher share of medical and care products and services, as well as recreational and related to leisure ones. Seniors increasingly pay attention to the quality of products and services they buy, they become more aware and demanding clients, and that is why producers, service providers and sellers should adjust their offer appropriately – in their own interest – because due to the demographic reasons there will be no shortage of buyers.

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HYBRID WAR OF THE RUSSIAN FEDERATION AND ITS CONSEQUENCES FOR SECURITY OF UKRAINE AND EURO-ATLANTIC AREA

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Abstract

The current situation in Ukraine confirms that the European thesis on solving conflicts within peace and diplomacy categories does not work in a perfect way. The evaluation of the Russian Federation's activity (RF) after occupying the Crimea shows that strategic objectives of Moscow have spread farther. In the strategic dimension the hybrid war led by Moscow is measured up against the entire NATO as perceived being the main threat. Past experiences in Ukraine and the theory assessment show that the new generation war run by the RF embraces multi-storey efforts directed at the state's function destabilizing, changing the internal order or/and leading to the state's bankruptcy not even necessarily seizing its territory. The complex nature of the hybrid threats requires undertaking integrated actions by the international community. It seems it will be possible to reach it while having the common NATO and EU doctrine on the hybrid threats counteraction. States, particularly those endangered, should draw up and implement their own accustomed strategy of the national security that will let opposing both classical and hybrid threats with as well as without the NATO aid.

Key words: *the hybrid war, threats, the Russian Federation, the Ukraine, NATO, the European Union.*

INTRODUCTION

The Russian aggression in Ukraine in 2014 and the illegal annexation of Crimea has been the first case of a forceful movement of the borderlines and incorporation of another state into the territory of an aggressor since the end of the Second World War. The event changed the perception of threats to the world, especially to Europe

and direct neighbours of the Russian Federation (RF). The infringement of the international rules on peace and international security took place in defiance of the decisions of the United Nations Charter of the USA even though Russia is a permanent member of the UN. In spite of the fact that Russia signed the Final Act of the Security Conference and Cooperation in Helsinki [Conference...1975] in 1975, The Budapest Memorandum on Security Assurances in 1994, is a member of the NATO-Russia Council and European Council; it does not comply with the member decisions, documents and settlements. The unprecedented infringement of the international law by Moscow, restoration of the power of Russia, conduction of the expansion policy and intimidation of the West took place after all in the circumstance of quiet acceptance of the NATO and EU what can be an expression of the lack of strategy of response. Restlessness of the states of former Russian republics very dependent on Russia in terms of economy and energy [Šešelgytė, 2014, p.2] caused V. Putin to say that the armed force of the RF can be used for protection of Russian-speaking people that stay outside the Russian state [Menkiszak, 2014, p.6]. These countries are afraid that the Ukraine scenario of destabilization of the institution of state, chaos and unrighteousness can be repeated.

The situation in Ukraine confirms that the thesis of the European reasoning in the categories of peace and conflict-solving through diplomacy did not testify, as well as the frequently used throughout the last decades by the USA, the strategy of *hard power*, namely the use of a regular armed force. The engagement into the Russian Federation on Ukraine after the exit from the country by W. Janukowicz opens a new epoch of the Russian strategy in reaching its political objectives, and on the other hand, changes the paradigm of employing the regular force in modern wars referred to as hybrid, non-linear or new generation wars. It turned out that the second decade of twenty first century is the decade of restricted use of the armed force which is proved by the strategy and practice of the USA, China and concealment of the use of the force by the RF in Abkhazia, the South Ossetia or Transnistria [Lambert, 2015, p.2]. Russia, in pursuit of expansion and restoration of its great power, combines many well-known so-far methods of the use of force with new abilities gathered mainly thanks to new technologies as well as the instruments of non-military influence with modern concept of holistic and multi-dimensional influence on weaker elements of defensive force of a hostile state. A centered structure of command and process of leadership allows leading long-standing, coordinated operations in diplomatic, informational, economic, military and cybernetic dimension. This way, Moscow reaches its strategic objectives without an official warfare. Other methods may embrace the threat of the use of nuclear weapons [Chekinov, Bogdanov, 2013, p.22], mass use of regular armed force and pressuring through creating frozen conflicts. The RF operation on Ukraine strengthens the conviction that the European-Atlantic security becomes less and less stable and the security environment undergoes rapid transformations. Nowadays, the largest threats are posed by the Russian strategic objectives, Military Doctrine and ability possession [Maigre, 2015, p.4].

The aim of the article is to define the challenges and threats for safety resulting from the concept of a hybrid warfare led by the RF as well as identification of counteractive methods. Results of researches are presented by solving the problems

as follow: 1) What is the essence of warfare expressed by? 2) What challenges and threats for safety result from the concept of hybrid warfare? 3) How should the hybrid threats be counteracted?

DEFINITION OF THE HYBRID WARFARE

The theory of threats and hybrid warfare occurs when the conflict between Israel and Hezbollah closes in 2006 and basically refers to the conditionings of events of the last decade. Definitions formulated by F. Hoffman [2009] do not correspond fully with what we observe in Ukraine. Hoffman emphasizes that the characteristic of hybrid warfare is commonness of the acts of terrorism and variety of crime forms [Hoffman, 2007]. He defined hybrid threats as an opponent who simultaneously and adaptably uses integrated combination of conventional weapon and irregular tactics, terrorism and criminal elements on the battlefield in order to reach political goals [Hoffman, 2009, p.14]. The definition above does not work in the confrontation with non-kinetic threats that take place commonly in the Ukrainian conflict. Nevertheless, it indicates that as a result of hybrid warfare the political goals are reached which means that operationalization of the concept serves for realization of the strategy. The Ukrainian experience proves it. Thus, the concept of hybrid warfare as distinct from those of last decades should be considered in strategic categories. Therefore, the thesis should be posed that it inscribes well in the Clausewitz's paradigm of warfare conduction which says that war is only a continuation of policy by other means [Clausewitz, 1995, p.28]. A. Jacobs and G. Lascoasnjaris (2015) propose a very general but also universal definition of hybrid warfare which would seem to be conceivable if it is not limited to operations with the use of violence. In their meaning, the concept of *hybrid warfare means a form of conflict with the application of violence which state and non-state actors are involved in using conventional and unconventional means of influence not limited to the battlefield or a specific unconventional of influence, not limited to the battlefield or a specific, physical territory* [Jacobs and Lasconjarias, 2015, p.3]. In the hybrid warfare, the space of influence, as distinct from a traditional warfare, is not limited to physical dimension and is present in other dimensions in which regular armed forces did not influence so far. Its essence is to cause planned and coveted effects which are synchronized. A. Deep states that the effects are received thanks to the employment of asymmetric technics and tactics are synchronized on multi-dimensional battlefield [Deep, 2015, p.1]. Multi-dimensional character of fight and the significance of synergy of the effects can be seen also by F. Hoffman [Hoffman, 2007]. His descriptive approach to the threats and hybrid warfare seems to be correct one. It is believed that hybrid warfare combines a variety of fight models and involves classical military abilities, irregular tactics applied by irregular formations, terroristic acts, common violence and intimidation as well as criminal chaos. To follow the course, he believes that the hybrid warfare can be conducted both by state and non-state actors. He thinks that multimodal activities can be implemented by separated subjects (or even one subject), but generally they are operationally and tactically directed in the main battlefield aimed at reaching the effect of synergy in a physical and psychological dimension of conflict [Hoffman,

2007, p.8]. J. Messner perceived the significance of a psychological dimension. He said that informational and psychological impacts were the factors that determine the victory or failure in fight. He posed the thesis that in hybrid warfare psychology was its fourth dimension (Messner, 2005, p.395). Then, as opposed to the classical war the aim of hybrid warfare is not an occupation of the territory of a hostile state but an occupation of the awareness of its society.

CHALLENGES AND THREATS OF THE HYBRID WARFARE

The assessment of Russian activities in order to conquer Crimea and involve in the war in Donbas points out that the strategic objectives of Moscow do not limit to destabilization of the situation in Ukraine, pressuring the authorities in Kiev and realization of the plan of making New Russia, but they do not go further. Restoration of the great power status of Russia and developing the spheres of influence endanger the states of the East of Europe. Hybrid warfare led by Moscow in strategic dimension is measured up against the entire NATO which is perceived as the main threat. Putin will try to humiliate NATO and undermine its reliability of alliance [Šešelgytė, 2014, p.3]. The Russian new approach to war waging without its official declaration combines many recognizable elements with a modern concept of influence of the so-called hard and soft one, with an emphasis of the other [Lindley-French, 2015, p.4]. The Russian strategy is not limited to irregular armed force as it is defined by Hoffman, but predicts the use of hybrid instrument being in disposal of the entire state. Contemporary wars do not limit to the use of regular armed force. Thanks to a centralized structure of command and the process of decision, Russia can lead long-lasting, coordinated operations in the diplomatic, informational, economic, military and cybernetic dimension. This way, Moscow reaches its strategic objectives without an official warfare. It turned out that non-military instruments fail to provide immediate verdicts; nonetheless, they are more effective than the armed force. The armed force as the Russian Military Doctrine indicates will be always employed in modern conflicts, but only when the influence of non-military instruments will appear to be ineffective and only in the times deciding about the final results of a conflict [Chekinov, Bogdanov, 2013, p.22-23]. The phenomenon of hybrid warfare consists in reaching strategic objectives without the need to wage a military struggle in traditional sense. It testifies the thesis posed by J. Messner who stated that the end of the twentieth century would put an end to the epoch of warfare according to Clausewitz's opinion as a clash of two opposing armies [Messner, 2005, p.118].

Russia permanently introduces the state of threat for all member states of NATO which is proved by making demonstrative flights but of armed fighter-bombers and strategic bombers. Russia provokes and tests the NATO defense system through playing with submarines in the Baltic Sea [Schadlow, 2015, p.2]. Russia runs also aggressive exercise based on the scenario of aggressive operations with the use of nuclear weapons throughout its own territory and arctic area. Defense budget raises constantly and pursue gathering new capabilities by programmes of the development of armed force planned for the period from 2010 to 2020 [Smura, Lipka, 2015]. The background for the reforms of the Russian armed force will be the concept of network centrality and non-linearity [McDermott, 2014]. J. Bērziņš

points out that in the transformation of the Russian armed force the following priorities will apply [Bērziņš, 2014, p.5]: 1) Departing from direct destruction in favour of direct influence; 2) Departing from direct elimination of an adversary in favour of drawing it closer and convincing him to join the attacking side; 3) departing from armoured warfare in favour of culture warfare; 4) departing from the use of regular general military subdivisions in favour of the compact, networked subdivisions of variety of specialisations, integrated in the informational space and private military companies; 5) departing from traditional, tridimensional fight in favour of the informational/psychological fight and perception fight; 6) departing from direct clashes of armies in favour of non-contact fight. As a result of the realization of the armed force development programmes the Russian Federation intend to possess new capabilities of psychological operations, strategical misconception and strategical communication. The aim of the Russian reforms is taking strategical initiative which is the condition of victory.

Kremlin effectively applies masking (*maskirovka*) which is part of a Russian doctrine of 1930 on the strategic, operational and tactical level. However, what used to be technics of battlefield nowadays has become a strategic state tool and overshadows the entire Europe [Lindley-French, 2015, p.4]. It is supported by informational fight which intends to mislead in differentiating between what is true and false, between reality and fantasy. In the Military Doctrine of the Russian Federation of 2014 there were found records on asymmetric methods of operation that let eliminating the advantage of an enemy, participating in the conflicts of irregular subdivisions of the armed force and private military companies. An important emphasis was put on the use of political powers and social movements directed and funded from outside [Military..., 2014].

One can see changes in the views of Russian strategists on war conduction in the articles and public speeches made by the Chief of the Russian Federation General Staff [Banasik, 2015d]. The general Gerasimov presented the twentieth century war model called a new generation war in which a special emphasis is put on the measures of non-military impact used for political and strategic objectives achievement. Gerasimov can see the significance of modern technologies. Therefore, he maintains that precise strikes from a distance on selected objects of states' critical infrastructure and selected military objects will be a new non-contact form of the future fight [Banasik, 2015d]. For the asymmetry and destabilization of a hostile state throughout its territory and in all dimensions of its function he also refers to the future wars as non-linear ones [Gerasimov, 2013]. Foregoing experiences in Ukraine and the assessment of theories indicates that new generation warfare includes multi-storey efforts oriented towards destabilization of state functions and transformation in its internal order. As opposed to the conventional warfare a centre of gravity of new generation war will be centered in the society [Banasik, 2015c]. The Russian perception of a modern war is based on the idea of playing war in people's minds which was pointed out by Messner. In consequence it leads to a large-scale informational impact in order to gain the upper hand in their psyche, leads to frustration and moral decay of both the armoured subdivisions and civil people. In a new generation war the pursuit of deployment of combat subdivisions of the armed force only in the last resort. On the other hand, an adversary will be impelled to engage its whole potential. It will let

influencing the government and the entire state destructively which as a result is to lead to its failure [Banasik, 2015c]. Russian operations in Ukraine unambiguously indicate that the security environment in Europe becomes unpredictable. The aim of the Russian hybrid impact is pressuring and destabilization of neighbouring states without the need to seize the territory. Combination and synchronization of camouflaged non-military operations cause the effect of surprise and handicap the adequate reaction especially of international organizations functioning on the basis of consensus. Hybrid warfare is dangerous, because it is easy and cheap for an external aggressor, yet costly and negative in its consequences for a defending one [Popescu, 2015, p.2]. Blackmail about the use by RF nuclear weapon and large-scale use of militaries and conventional weapons as well as creating frozen conflicts is a large threat for the security of the Euro-Atlantic area. In order not to prevent a large-scale crisis situation the **protective operations** are deliberately taken up.

STANDING UP TO HYBRID THREATS

Coordinated and asymmetric operations by RF with employment of many instruments create a strategic ambiguity. Through a complex and multidimensional influence Russia intentionally sends wrong signals, which mask its real intentions, confound adversaries, impede decisive process and make a response ineffective. Putin in his pursuit of division of the West and influencing the weakest elements by means of a hybrid strategy with the use of conventional and unconventional tactics paradoxically led to approach of the NATO and the European Union (EU). The awareness of seriousness of the situation made the NATO collective defense to be its highest priority and the EU wants to contribute to the security as much as possible in both political and military field.

In order to ensure preparedness of the Alliance to respond to new challenges in the security area, in Newport Summit the “Readiness Action Plan” (RAP) was approved. The plan aims to enforce a collective defense of the Alliance as well as to enhance the capability of crisis management. The plan elements involve measures referring to both constant need of ensuring Allies’ security and strategic adaptation of forces and military measures of the Alliance to new challenges in security area [Banasik, 2015a, p.34, 35].

In the framework of the continuation of the foregoing security measures of allied militaries applied in 2014 the Alliance decided to maintain continuous and rotational presence of Allied armies on the ground, at sea and in the air of the Eastern flank territory as well as the Baltic, Black and Mediterranean Sea. The alliance will continue to perform intensified exercises, especially in the Eastern flank territory. Scenarios of those exercises will be tailored to present challenges, particularly the threats coming from the East. A situational awareness will be enhanced by flights of AWACS aircrafts on the Eastern flank, namely, in Poland and Romania as well as by increasing the exchange of reconnaissance and intelligence information between allies and NATO’s Command Structure [Wales..., 2014].. Strengthened Baltic Air Policing will be maintained consisting of 16 aircrafts based on Siauliai airport in Lithuania, Amari in Estonia and Malbork. It is planned to enhance the cooperation between NATO’s Command Structure and national

commands, and up-dating of defensive plans and potential one for the countries of the Eastern flank [Banasik 2015a, p.35].

The second part of the „Readiness Action Plan” involves adaptation measures essential to ensure a full ability of the Alliance to live up to new challenges in the security area. As part of the resources the Alliance will make reforms of NATO Response Force (NRF). It is planned to increase its number from 13 thousand to 25 thousand of soldiers. Nowadays, the NRF functioning collection will be enforced by hard and anti-aircraft units prepared to rapid deployment in the region threatened. Within the framework of NRF Very High Readiness Joint Task Force (VJTF) the so-called “Spearhead Force” will be organized. It will be a unit in size of the brigade of ground troops consisted of approximately 5 thousand supported by elements of the rest military force (maritime, air and special ones). VJTF should be capable of deployment in a region threatened within 2 to 5 days since the decision is made. Readiness of the elements of VJTF will be examined as part of exercises announced shortly before. Achieving complete operational readiness of VJTF is anticipated for 2016 [Banasik, 2015a, p.35, 36]. Until then, the part of temporary VJTF will play the elements of NATO Response Force Collection of 2015 consisted of German, Dutch and Norway subdivisions [Lorenc, 2015, p.2].

Justification of decision-making process is planned in the scope of VJTF force activation. Nowadays, in order to use NATO Response Force the consent of North-Atlantic Council is required which delays the process of their activation. According to the preliminary assumptions, VJTF unit will be subordinated to NATO Command Structure on a rotational basis to one of NATO High Readiness corpses [Banasik, 2015a, p.59, 60]. In the case of its use in NATO Eastern flank, the command of the unit would be taken up by Multinational Corps Northeast from Szczecin [Bielecki, 2015].

Parallel to the implementation of „Readiness Action Plan” the Alliance will work on strengthening capabilities in the area of response to the hybrid warfare which includes a wide spectrum of overt and covert as well as military, paramilitary and civil operations closely coordinated. The Alliance should possess the tools and procedures necessary for effective deterrence and reaction to the threats. For this reason strategic communication will be improved, new scenarios of exercises considering hybrid threats will be drawn up and coordination of NATO operations with partner states and organizations will be strengthened [Banasik, 2015a, p.36]. Critics claim that NATO prepares classical response against unconventional operations of RF. Undoubtedly; the unconventional abilities will be also needed to counteract the hybrid warfare including disinformation counteraction, subversive operations, or cyber attacks. Although Wales decisions determine some directions of counteracting hybrid threats, it seems that they are the consequence of traditional thinking. It is simply impossible to face the new idea by old methods. One may ask a question here: will VJTF be able to stand up against non-state actors applying unconventional methods of fight, procedures and technics or agents running subversive activity, spreading chaos, terror and intimidation? Is not it necessary in the first place to draw up a complex untraditional strategy enabling both collective and single state being the target of hybrid attack to response [Sandor, 2015, p.4]? Consequences of new strategy introduction need to find its reflection in the doctrine of armed force use, programmes and trainings. However, the most important are

the changes in mentality of leaders and soldiers that enable to fight in new quality conditionings. In the aspect of the operation conducted in Crimea which was not an armed attack but an operationalized new form of warfare, one can ask a question: are possible legal footings of NATO and the response instruments available adequate to contemporary wars requirements called by Gerasimov *new generation wars* [Banasik, 2015d]. The momentum and scale of military operations by RF are deliberately restricted and maintained by an aggressor at the level below possibly unambiguously identifiable the threshold of a regular open war [Banasik, 2015b]. NATO will find it much difficult to response as the level of aggression maintain below the criteria adopted for classical threats will not allow applying collective defense instruments as it was stipulated in Article 5 of the Washington Treaty on the armed assault to one or more side of Alliance [Art., 1949]. Readiness Action Plan signed in Newport should be the foundation stone of deeper changes of records in Article 5 and drawing up a new NATO strategy concept which will explicitly indicate not only how to stand up against complex hybrid threats [Lindley-French, 2015, p.10].

The European Union claims that hybrid threats will evaluate along with the development of new technologies. It is assessed that activities should be taken up for security of sensitive elements of a state security system. The core of defense philosophy against hybrid threats consists in complex recognition of the effects possible to withstand threats. It seems to be a correct assumption that a hybrid strike is designed and oriented towards the most vulnerable elements of a state function [Banasik, 2015d]. In the case of Ukraine the critical ones include: 1) weak government, state institutions and corruption; 2) weakness of security structures and state defense; 3) marginalization of Russian-speaking population; 4) much dependence on the Russian supply of oil and gas [Countering...2015, p.3]. The Ukrainian defense system likewise of other states was traditionally prepared to defend against regular state armed force. It turned out that it did not live up to the requirements being the consequence of non-state actors' appearance leading the so-called *proxy war*. The thesis was proved that the sensitive and crucial areas for a state functioning in the same time are: economy, energetic sector and fuel system, critical infrastructure, financial system, communication system and transport [Banasik, 2015d]. In this aspect, especially important for the EU will be provision of energetic security through a supply of energy from outside and diversification of its sources. Well-recognized its own weaknesses are the basis for preparing effective security and defense system against hybrid threats [Countering...2015, p.5].

The strategy of counteracting hybrid threats must consider conviction of a possible aggressor on the consequences of an operation and the price he would need to pay. Deterrence can be realized in two stages. Firstly, the consequence of sanctions can be expressed by punitive operations which lead as a result to severe damages on the attacking side and may turn out to be inviable. Secondly, it can significantly raise the level of critical infrastructure and prepare the society to unpredictable consequences and negative events [Banasik, 2015d]. There is a great room for development in searching the ways of cooperation between EU and NATO in preparing a complex collection of tools for counteracting hybrid threats. An integrated operation of those organizations based on a common doctrine can be the future fundamental pillar of deterrence [Countering...2015, p.6].

In conclusion it should be said that the complexity of hybrid threats requires a strategy based on which the politics and guidelines for taking up coherent EU operations need to be shaped. The conclusions of a debate on hybrid threats must find its reflection in a new strategy of the EU security policy. If common with NATO strategy of counteracting hybrid threats are not drawn up the EU strategy will need to be complementary with the NATO strategy. Drawing up a common strategy of counteracting hybrid threats is a good chance for improvement of the relationship between EU and NATO. It should be the ground of a mutual support [Banasik, 2015d]. Common EU security and defense policies in the aspect of counteracting hybrid threats is a good basis for exchange of the intelligence information, building new capabilities, including situational awareness and training and exercises conduction. The priority for EU is the establishment of a cell integrating information on hybrid threats. It will have a crucial meaning for warning on threats and preparing an adequate response. The communication strategy will considerably improve the message directed to the Russian Federation as well as preparing of the response to any expressions of disinformation [Banasik, 2015d].

CONCLUSIONS

Taking into account a lack of firm reaction of the West, decreasing the capabilities of the Ukrainian Armed Force and constantly enforced presence of the Russian armies on the territory of Ukraine spreading of territorial conflict cannot be excluded as well as the intention of taking territorial control over as far as Transnistria and in the same time cutting off the Ukraine from the Black Sea. Transfer of the methods applied by the Russians in hybrid war on the other regions including Baltic States cannot be excluded as well. Majority of experts' stance is that lack of prevention of the aggressive operation by the Russians in Ukraine at its present stage will result in the increase of threat of destabilization of the entire region of the Middle and East of Europe. No decision of president Obama and the presidents of East European States in the case of providing Ukraine with military support is wider and wider as well as more sharply criticized also by some representatives of American administration and supreme military leaders.

Results of the researches prove that the operations of RF undertaken in Ukraine are not an improvisation but reflect an ordered employment of the all spectrum of the tool available to the opposite side. In the aspect of all sequences of events one can pose a thesis that they inscribe well in the paradigm of Clausewitz on war conduction which says that war is only a continuation of a policy by other means. I claim that hybrid operations refer to exactly those means but the rules of war conduction, its character and objectives remain all the same [Banasik, 2015c].

It seems that it is not very likely that Russia will cross the borderline of the territory of NATO, nevertheless, it should be expected that through non-military operations it will try to destabilize a coherence of both NATO and EU. An effective response to hybrid operations will require coordinated operations of both organizations. In order to ensure it possession of a common doctrine of counteracting hybrid threats is essential. NATO should play a leading part in such areas like preparing military response, intelligence and deterrence and, when necessary, intervention. It seems that in the time of peace the best element of deterrence is a constant presence of

NATO armies on the territory of the most threatened states. EU should be responsible for counteracting in cyberspace, energetic and migration policy and counteracting propaganda. It is intended to pursue synergy in an integrated employment of all instruments being at disposal of both organizations [Banasik, 2015d].

Extremely challenging for both organizations and member states, particularly those threatened, will be reduction of any susceptibilities and vulnerabilities to the hybrid threats. Either NATO or EU will not ensure absolute security of member states in the face of hybrid threats but will certainly help in building their resilience to them. Particular states should elaborate and implement their own non-standard strategy of national security which will allow them to stand up to a classical or hybrid threat with and without the aid of NATO. For the realization of the strategy there need to be assigned resources that would ensure gathering the capabilities required. Undoubtedly, Eastern European countries have to modify the fundamentals of their defense structures to be able to take up future challenges [Banasik, 2015d].

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ESSAYS

THE MASS MIGRATION AND THE END OF DEMOCRATIC EUROPE

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Abstract

In the last decade, radical political movements became an important threat to European democracies in the conditions of decline on the popularity of main political ideological parties all across the Europe. Especially nationalist radical movements seem to become more popular among the citizens after they took over a Euro sceptical message and a radical message against minorities or immigrants from the populist parties. The extremist message of these parties or radical movements is almost the same even they are located in different countries or cultures. A radical message of a Christian Orthodox culture Golden Dawn in Greece is similar to a Catholic and Protestant culture the Magyar Hajnal (Hungarian Dawns) in Hungary – or the Progress Party from Norway – a more secular culture than religious based.

My paper is focused on the origins of these parties in Europe and their radical message against immigrants or social/ethnic minorities. We argue that such parties can succeed over the long term only when they both 1) build on pre-existing nationalist organizations and networks and 2) face a permissive rather than repressive political environment. Those parties develop themselves on a fertile ground of far right wing populism and assume a very narrow to the fascist discourse of the beginning of the 20th century in order to contest the economic and democratic order. By adding factors such as historical legacies, party organization, and interactions between mainstream parties and far-right challengers to the study of radical right parties, we can better understand their divergent trajectories.

Key words: *Extreme right-wing parties, populism, migrants, European Union*

On July 22, 2011, in Norway, one of the safest and most social countries in the world, Andreas Breivik killed 77 persons, of which 69 were attending a socialist youth camp. The worldwide shock was enormous and immediately the problems of the European extreme right, hate speech and xenophobia were exposed, because alongside the massacre Breivik planned and carried out, a shocking fact was the manifesto which he had sent from his computer a few hours before the attacks.

Breivik's manifesto is a glossary of the European and American extreme right, a manifesto of hatred and contempt of the average white male against the world he lives in, where he grew and developed. Breivik is just a visible odious outgrowth of a political current that was born in the twentieth century and was reinforced in Europe and the US after the Cold War. A recurrent question that arises is: How was that possible? Or rather: How is that still possible after everyone has seen the violence and crime excesses of the German extreme right in the years of the German Third Reich

Breivik's Manifesto, named 2038 – A European Declaration of Independence (Breivik, 2011) is – somewhat like Adolf Hitler's Mein Kampf – a mix of shared ideas and intellectual repressions against a society that does not recognize its value and a reaction to a contemporary intellectual main stream. Added to all these, an urban guerrilla manual, which he unfortunately put into practice shortly after publishing it. It is the work of a mentally disturbed person – quickly said the most – even though later, during the trial, forensic psychiatrists proved that Andreas Breivik was fully in his mental capabilities when he accomplished both the Oslo and Utoya island massacres.

The Breivik's manifesto would not probably have aroused any interest if it had not been followed by a mass murder, driven by the vision exposed in his paper. And it wouldn't have been interesting because this type of radical manifestos became, sadly, extremely common in the current political scene, which should really put us on guard; because Breivik is not the only one to expose radical ideas against the contemporary society and political left, and is not even the only one to commit murders. He just committed the greatest one of the twenty-first century, but his "patriot" comrades from Germany also killed Arab and Turkish immigrants in the name of the White Man domination [Breivik, 2011]. Moreover, as seen later, Breivik and Beate Zschape – a member of the National Socialist Structure who was involved in the killing of ten immigrants in Germany – were in contact, writing letters to each other. This shows that the extreme right phenomena became European ones, interconnected, ideologically founded on hatred and murder, on the contempt towards tolerance and humanism.

For decades, the European extreme right proffers the same theses and principles, many of them linked to the ones in the US, regarding the racial domination of the White Man over all other races, with strong xenophobic and anti-immigration accents. But the groups which were supporting these thesis were, until recently, marginal and without a major political relevance. Nor these could have had a social ascendant as the culture of civilised world was based, after the 60's, on the principles of a political correctness that prevented any type of hate speech, formal discrimination and that proposed a cultural model of social tolerance on all levels:

gender, religion, race. And this type of political correctness was based on the Enlightenment and Human Rights philosophy, which allows a fair competition with rational arguments in the public debate on ideas and not on prejudices of differences. This is the basis on which the twenty-first century democracy was desired to be built, and as Fukuyama shows [Fukuyama, 1994], this desideratum seemed very possible once the communism disappeared as the main ideological competitor to the Western political liberalism.

In general, the reaction of right wing ideologies to political correctness was massive, especially after the fall of communism, considered being a new type of soft totalitarianism. Therefore, the Christian conservatives movements – across the US and Europe – reacted extremely violently to this new ideology, considering it a new form of Marxism and an attempt of the left to stabilize the bourgeois society, society which just had won the war against the atheistic communism. Of course, it must be also said that certain left radicalisms, rather obsolete, generated a reaction against political correctness, which began to be fetishized and to be itself intolerant and incapable of a real dialogue, regardless the already sedimented common ideas.

The victory over communism as the apparent economic growth determined by globalization, generated an ideological speech opposite to the political left, based on Enlightenment and Human rights, on equality, individual freedom and equal opportunities principles. Losing its opponent – the soviet communism – the western democracies which until then defined themselves in contrast with it, lost their sense of identity and aims. They do not know anymore what they are and where they are heading to. What seemed to be a given fact before, is questioned now. Without the worldwide communism external pressure, democracy and liberty seem to get internally atrophied in western capitalist countries. Citizens feel that a world order died without another being born, and do not even know which way to search for a new order.

Unfortunately, a great part of the political left – especially cherished by the European social democratic parties – became contaminated by the double language of absolute economic freedom and the state's withdrawal from the economic sector, on the background of economic globalization. Thus, the middle class – a quite vague sociological concept – replaced the proletariat from the militant discourse; the parties' main aim was to bring as many people as possible within the middle class (considered the future's class) from the extremes (lower middle class and upper middle class). The social groups that couldn't, for various reasons, succeed entering the middle class – extreme poverty, lack of culture, occupying marginal crafting professions, physical disabilities etc. – were demonized, considered to oppose the progress of globalization.

One who reads nowadays Giddens' "The Third Way", "A third way and its critics" [Giddens, 2001, 2001] or Tony Blair's "A Journey" [Blair, 2011] understands how the 90's and beginning of 2000's social democracy gave up on the principles of syndicalism, equal opportunities and theorized the weakening of economic regulation. Thus, social groups, especially ethnic ones were abandoned, although the concepts of multiculturalism and equality regardless race, religion and gender were not formally abolished. Moreover, closer to nowadays, the leaders of western countries have formally abandoned multiculturalism, either assuming its failure, either by simply blaming it: "In 2010, in Germany, Chancellor Angela Merkel

discussed the multiculturalism which has “totally failed”. In the UK, February 2011, Prime Minister David Cameron does exactly the same thing: “in the name of multiculturalism we have encouraged different cultures to live separately. We failed in an attempt to give them the vision of a society they wanted to be part of. We even tolerated those communities to mock our values”. Opinions also shared by the French President, Nicholas Sarkozy: “Multiculturalism has failed in Europe and in France, as we were too preoccupied with the identity of the incomer and not enough with the identity of the country receiving” [Sevilla, 2012].

Abandoned by the withdrawal of the political left parties and by the more and more less economically regulated states, vulnerable groups (especially cultural and gender minorities, but also economic ones) became the targets of the right-wing populisms and nationalisms. Paradoxically or not, the ones who took advantage of the lefties withdrawal were not the conservatives but the right-wing populists, with their ambiguous ideology – which supports globalization’s tough capitalism, but desires the strengthening of the national state and/or the Judeo Christian tradition of the west against the threats of globalization. This ambiguity was overcome after the 9/11, when with the war against terrorism, the ideological and civilizational fault lines became reality and the enemy got a name and a face – the stranger, especially Islam.

Populism is an undeniable reality in nowadays’ Europe, especially after the European parliament elections in May 2014. The question is why it enjoys such a high popularity, having such a public appeal? The answer is nevertheless that populism answers to a deep need, essential to human being. Which is that need? The need of a myth! I.e. the need of a presumed, confirmed in practice and reputed to be a perfect life style, whose achievement offers a superior motivation to human existence and an explanation or orientation to social action.

Trying to catch the essence in defining human being it has been talked about *homo sapiens*, *homo faber*, *homo ludens* or *homo religiosus*. On this frame we can add *homo mythologicus*. It states the truth that the man not only needs to eat, dress and make a living, but also to believe in what he does and what he does/make has a sense, an explanation, a reason and a respectable utility. The myth offers the necessary grounds for such belief. [Cassirer, 2001]

The ideal is for the man to establish realistic and real goals. In principle, no one chases unrealistic goals. Since it cannot precisely be known what is realistic and what is not, the realism of a current project can be measured by reference to a circumstance from the past in which it had been materialised. If once a certain goal was achieved then it is reasonable to think it is achievable once more. If in the past the achievement of a goal brought happiness, then its achievement in the future will have the same consequences. Such logic is not bad. The myth, however, is not a real history, but an imaginary one. It does not describe the past as it was, but as we wanted it to have been.

As aspiration and method of mobilization for self-improvement, the myth has the ability to play a positive role in history. The problem arises when a man confuses myth with history; and this happens when he doesn’t like the reality and therefore refuses to believe in it any longer, preferring to take refuge in illusion, dream, possibility, virtual. Those who do not find their material security, those who are

dissatisfied with the results of concrete actions, seek asylum in symbolic security, hiding in myth.

Most do not expect the dream to come to life. Unfulfillment does not kill the dream or the one who maintains it. A dream can be killed only by another dream. A myth can be destroyed only by another myth. Until then, apparently effective solutions prove themselves, on medium and long term, counterproductive, only rather contributing to remote the goal, than getting close to it. For such outcome, any democratic leader would be under popular sanction. The populist leader is not liable for concrete results, but only for maintaining the comforting feeling that these are achievable. I.e. is practically does not respond at all, or at least it is not accountable towards the masses, through democratic procedures.

The populists and populism can be torn down just through the symbols they created, when they lose control over their evolution or by myths and replacing symbols.

As David C. Art shows, radical right movements were born on the background of this kind of populism [Art, 2011]. In the 90's of the twentieth century, the radical right movements were extremely marginal, without any success to western audience. But once populism became an acknowledged ideological model, with lots of success in the public opinion, the extreme right could also enter (re-enter?) in the social attention. Because, in our opinion, movements like Golden Dawn, Jobbik, the German National Democratic Party (neo Nazi) etc. are extreme formed crafted on the ideological model of populism, sharing the same values and ideals. Only if the populist parties remain declaratively populist, the extremist ones focus on actions, being some sort of assault battalions (SA) of the parties which capture the audience through populism. Even more clearly, the Progress Party in Norway – party which assumes its national xenophobic dimension and calls on to limiting immigration – does not incite to mass murder against immigrants and/or socialists, while as Andrea Breivik will kill calling on the ideological model the Progress Party promotes. In essence, the extreme right ideologies are remarkably similar in every country, having the same set of principles to promote, all relying on what Erich Fromm used to name the *fear of freedom* [Fromm, 1998], although paradoxically these ideologies see themselves as liberating for their peoples and the leader himself a Liberator. Only that the oppressive element they always question is not a direct invader, a colonizer as in the Third-Worldism ideology, but a cultural, diffuse invader, which spreads oppression through extremely new and pernicious cultural objects.

The enemy is the Alter, as a completely foreign and unable to be assimilated Alter [Art, 2011], which through his actions weakens the (national/religious/cultural) Self. Therefore, the extreme right is xenophobic; although xenophobia differs from one society to another, for their specific cultural experiences. That is why the French and North American extreme right is Islamophobic, and the Hungarian and Czech is anti Roma people. All are instinctual – refer to odour, colour etc. – referring to totally different ethnic and religious groups. Roma people in Hungary or Slovakia are predominantly Catholic, as the majority, being identified as enemies through sensations and prejudices. This is not the case of Muslims in Western countries that have been trying to preserve their cultural and religious identity and are blamed for not allowing themselves to be completely assimilated. Bulgaria's case is even more interesting because ATAKA – the Bulgarian extreme right party –

is against the Turkish minority in Bulgaria and due to this Islamophobic – but without linking immigration to Islam. Thus, the Muslim Turks in Bulgaria are rather seen by the ATAKA as Roma people in Hungary or Czech Republic, while there still exists a harsh reaction against the local Roma people, but which are Orthodox Christians.

These variations, even though apparently uniform, show that in extreme right ideologies there are massive differences in seeing the enemy, culturally and religiously. And the error usually made is to assimilate all these currents with Nazism and interwar fascism. There is of course a certain fascination for the uniform, for black colour and for certain Nazi symbols (see the rune on the Golden Dawn emblem). But most extreme right movements reject this lineage, rather embracing the right-wing populist discourse, adding a strong tinge of violent activism.

Even in their work, *Mapping Extreme Right Ideology (An Empirical Geography of the European Extreme Right Ideology)*, Michael Bruter and Sarah Harrison [Bruter, Harrison, 2011] show that it is very hard to prove a lineage of the contemporary extreme right with the interwar Nazism, the current extreme right being the violent (radical) wing of the European right-wing populism.

So which are the characteristics of the European extreme right in general? Firstly, pronounced xenophobia, as Islamophobia or anti immigrationism, or against any other minority of the state within which these types of parties are founded. Xenophobia is sometimes doubled by the development of a white man mythology – European and/or westerner – compared to other cultures. What must be said is that there aren't identified many racial theories, the focus being put not on the idea of race, but on culture and economic development. If there is something imported from the interwar period – taken via the US (according to Bauer Schmitter, 2001) – that is a strong social Darwinism based on the cultural and economic survival of the societies that are able to create and develop versus those societies that are incapable of this and which, if there wasn't the white colonizers' modernization process, would be still stuck in pre-modernity.

Hence the contempt shown to foreigners seeking to immigrate to European societies, but do not want to change their customs and their native cultural model, thus entering into conflict with the majority.

As shown, there are three types of manifest xenophobia, one against immigrants (Muslim or any other religion) considered a threat to social stability and to the majority's dominant culture, another exclusively directed against Muslims considered potential Islamic terrorists and one against local minorities. To these three types is added a new form of xenophobia against intra-communitarian immigrants – Romanian or Bulgarian – considered recent invaders who threaten the welfare and economic security of the western Europeans.

This latter type of xenophobia also shows the reaction of the extreme right to social-assisted groups – social parasites – as named by the Golden Dawn – and the less fortunate. Thus, the radical groups in Greece or Hungary do not only attack immigrants, but even their own citizens considered to be socially and economically useless. This reaction against those on the margins of a society becomes one of the main elements in recognizing extreme right groups who use violence against the poor, regardless their origin.

Therefore it is to be observed an obsession with superiority, similar to vitalism in Italian fascism, adopted from Friederich Nietzsche's philosophy [Conway, 2002]. But such an intellectual lineage is hard to imagine among most of the extreme rights' members. This superiority, which agglutinates within it nationalism and Arianism (not racist in the sense of the concept, but the idea of the white man's superiority above any other cultures); considering Geert Hofstede's theoretical model that assumes there is a great influence of the national cultural model over the individual behaviour. In his most important work "Cultures and Organizations: Software of the Mind", Hofstede [Hofstede, 1991] claims that organization's cultural model (aka. The nation) dramatically determines the behavioural, labour and entertainment model of one individual, including his basic structure of values and morality. Thus, Hofstede's theoretical model is based on the idea of a national difference between individual values. It must be said that Hofstede did not propose a theoretical model for the political righties, but it was saluted and quickly embraced by the extreme right, recovered even in Breivik's manifesto [Breivik, 2011].

From this theory the extreme right draws its superiority considering that there are major differences between cultures and therefore some cultures are superior to other due to their cultural and values, and the most successful model of modernity and post-modernity was the western capitalist one. This is why the extreme right isn't anymore – as the interwar one – against capitalism, but, alike populism, the advocate for a pure and harsh capitalism, based on a completely social Darwinism, or a rather national (European) Darwinism, to which foreigners aren't allowed to participate in order to do not falsify the competition data.

There is a whole dispute among researchers related to the correlation of the economic crisis and the strengthening of extreme right movements in Europe, and probably both models have their truth. What can be said, on the surface, is that the economic crisis has shaken the consolidated values and lifestyle system of the European societies, generating conflict instead of the previous democratic consensus. Or, for some, this extreme right conflict seemed a formula for turning back to previous values and a re-stabilizing model of the middle class, threatened by the radical groups (considered anarchist) on the left side of the political scene. Calling on the cultural tradition, labour and capitalism – things that have already become ideological mantras in the last thirty years – the extreme right transformed itself into the watchdog of the "disasters" capitalism, theorized by Naomi Klein. Therefore, the extreme right is by definition a reactionary ideology, an ideology that wants to maintain the status-quo of the previous groups, favoured by the capitalist competition. Or these groups must constantly appeal to consensus and unity myths, the saviour hero and to generate the fear of conspiracy and invasion [Klein, 2008].

The expression of the clearest success in spreading the extreme right populism in Europe is what I would call "The Orban effect", even more obvious than Brexit. Elected prime minister in Hungary in 2010 (as president of FIDESZ) with 52.4%, with a conservative nationalist discourse, against corruption and Eurosceptic, Viktor Orban will ally with the extreme right Party Jobbik in order to achieve a parliamentary supermajority. This supermajority of 67% was responsible (under Viktor Orban's political in-offices) for modifying the Constitution in an extreme

nationalist sense that the Hungarian Nation becomes a source of law and the Hungarian language and tradition are considered holy. According to this constitutional change (the preamble of the Constitution is broader than the Constitutional text itself), the citizens of Hungarian origin in the neighbouring states, but not only, but also in the transcontinental Diaspora – such as the US, Canada, Australia – become Hungarian citizens by law. Thus, for the first time since the foundation of the European Union *jus sanguine*, the membership to a nation brings along the citizenship of that state.

Although a clear violation of EU treaties, in which Hungary adhered, the constitutional change was superficially treated by the European Commission (led by EPP, to which FIDESZ belongs) and there were no direct political, administrative or economic consequences. These consequences existed a decade before, when, in Austria, the populist party FPA (Freedom Party of Austria), led by Jorg Haider, came to power. And the FPA and Haider were guilty just for some tinted Nazi statements, without implementing any anti-EU policies. In contrast, a political or economic embargo did not exist in Hungary.

Seeing clearly that the UE is incapable of tough political initiatives, Viktor Orban, the Hungarian prime minister, adopted several anti-European and anti-liberal policies – such as limiting and censoring the independent media, exceeding the European tax quotas (Hungary has a 27% vat, although the European limit is 25%), intervention within the independence of the National Hungarian Bank and then upon the foreign exchange market (re-conversion of private debts in forints) etc. Viktor Orban even named this anti UE offensive: the Liberal Democracy [Budapest Beacon, 26th of July, 2014]. Faced with this offensive, the European Commission reacted without visible results, strengthening the confidence of all populist political forces that the EU's structures are incapable in fighting the extreme right.

As a reaction to this withdrawal of the EU's structures, Central and Eastern Europe and especially the member states of the Visegrad Group, were undertaken by nationalist-paternalist-populist governments. In 2012, Robert Fico, the leader of SMER – socialist declared party, but with strong Eurosceptic and nationalist accents, became prime minister, silently adopting Viktor Orban-like measures, so that in 2014 to become president of Slovakia and in 2016 to install a government in which SMER is directly associated with extreme right parties [Mihálik, 2016]. In the spring of 2015, in Poland, Andrzej Duda was elected president for an anti-European and anti-political elite rhetoric, calling for catholic and national Polish spirit. After the victory (somehow unexpected against the pro-European Komorowski), the party supported the current president (Law and Justice Party, catholic conservative declared party, member of the Alliance of European Conservatives and reformists AECR of the European Parliament) won the elections. And the first head of state Beata Szydlo met (prime minister of PiS of Poland) was, not by chance – Viktor Orban, both ensuring mutual support “against the double standards of the EU”.

Therefore, the “Orban Effect” metastasised throughout Central and Eastern Europe, generating an anti-European and anti-integrationist reaction. But the “Orban Effect” became the most visible in recent years for its position against the migrants (humanitarian and non-humanitarian) generated by the crisis in the Middle East.

The civil war in Syria, the Daesh explosion in Iraq and its spreading within the power vacuum of Syria engaged millions of people into exodus. Religious persecuted

families (Shiites or Christians), political persecuted (against the Damascus regime) or simply for military or strategic reasons, millions of people lost their homes and jobs, or are even more likely to lose their lives due to military confrontations, were forced to leave their home country and seek refugee status, according to Human Rights and Dublin Treaty, for EU. These huge groups of persons – men, women, children, elders and teenagers - have chosen a since recently, eccentric way of migration. This path which included (includes) EU member states and non EU states made their access and support extremely difficult. Leaving Syria or Iraq, via Turkey, these people arrived in Greece, in Europe, then – most often on foot – crossed Macedonia and Serbia for entering the European territory through Hungary. The majority of these migrants didn't want to stay in Hungary, but to transform it in a transit area on their way to Germany or Sweden.

If in the beginning, Hungary had an ambiguous attitude regarding accepting the migrants, giving them the right to transit its territory, without monitoring them, but since the autumn of 2015 the attitude has radically changed. From rising up wired fences on the border with Serbia (threatening to raise up even on the border with Romania – EU member state) till trying to completely block access for migrants. Barring millions of people on its borders, Viktor Orban's Hungary generated a major humanitarian crisis and hence a political crisis. Due to this crisis, Orban created a political platform involving not only the Hungarian citizens but almost the entire European society.

His deeply anti-immigration discourse was based on the idea of European identity, Christian, opposing Islam, and on the security obsession haunting the European society after the Paris attacks in January 2015. Thus, using the populist-nationalist language for its electorate, and a security – oriented populism for the European audience, Viktor Orban collided with European leaders, including those of the European Commission but also national state leaders such as Angela Merkel (German Chancellor) or Francois Hollande (French President), the advocated for a tolerance and inclusion policy of the EU. They proposed introducing mandatory quotas for the integration of migrants in the European Union's member states. Viktor Orban was the first to oppose such a plan, even if Hungary would have rather had benefits – including economic – being considered a country in humanitarian crisis along with Greece. Orban's speech was supported at the time by UK's Prime Minister Cameron, which mixed inter-communitarian migration with extra-communitarian – giving it an economic dimension. For this reason, the immigration issues became a European problem of strategic importance which outline three currents within the European Union, currents which have deepened tensions and, ultimately, blocked the consensual decision making process of the European structures.

The Visegrad group, which Romania also joined, declared that they would reject the mandatory quotas (meanwhile Poland accepted them), thus blocking the process of adopting a decision [Mihálik - Jankófa, 2016]. Therefore, although there formally exists a European agreement regarding relocation quotas, it doesn't actually function. The second current just seemed – in our point of view – indifferent, and the third one gave a tolerance and migrants' integration signal.

We will not go into the tribulations of the European process on this issue. What we wanted to prove is that the "Orban Effect" generated serious European tensions,

threatening the very unity of Europe. Its speech, adopted by more and more populist groups in Central and even Western Europe, emphasises the European Christian identity, the social impact of migrants on the asylum countries and not least, uses this subject to threaten the European construction and its values. The speech about tolerance and humanism of democratic liberal European leaders comes in contrast with a speech about tradition, multiculturalism refusal and firm isolationism.

The tradition to which the extreme right European movements refer is different, depending on its cultural, political, social and religious dimensions of each society within which these groups activate. But if there is a thing which unites them is that the majority achieved a political relevance during or against the socialist governments in Western countries, considered either corrupt or incapable of solving social problems, and which have offered a shelter or even citizenship to migrants from outside the European cultural area, especially those originating from Muslim areas. Thus they were able to combine the attack against migrants with the attack against socialists and implicitly against multiculturalism and political correctness.

This attack was based on the return to what were considered to be traditional, especially religious or national and cultural values [Albrecht, 2013]. Of course, religiously speaking, not all the movements of the extreme right resemble one another. In orthodox states – such as Greece, Bulgaria, Cyprus or Romania – we witness a strong call to return to the original, agrarian community, considered profoundly moral and with the “fear of God”, which obediently accepts its history and crisis. This is not the case of catholic or protestant countries, where the religious dimension are much smaller. While in orthodox countries the Church shared the positions against political correctness and multiculturalism, assuming a reactionary position to modernity and post-modernity, in catholic countries the church is not seen as a partner and in protestant countries the relationship is almost inexistent.

But, with or without the support of the Church, the extreme right reacts even more violently against sexual minority groups, feminism and to any other liberty of conscience idea, considered all as manifestation types of the socialist ideas, and thus, of multiculturalism. It is obvious that the extreme right tries to become a reactionary ideology of the middle class to the change produced by shifting to modernity and post-modernity.

And therefore here appears the paradox of the extreme right movements, which although declare fighting for political and moral stability of the middle class, it just attacks the fundamental elements on which it was founded after the Second World War: liberty, dynamism and tolerance.

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INTELLECTUAL TRADITION OF UNIVERSITY IN THE FACE OF CURRENT CHALLENGES

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Abstract

With this essay I want to pay attention to the condition of the contemporary university and to define its function in the future. According to the rich tradition of university I pointed at the meaning of humanistic research as the research that describes the character of high education. I focused on the mission of postmodern university, as a part of postmodern culture which destroys humanistic values. I do not agree with postmodern egalitarianism and utilitarianism of higher education and I recommend coming back to the 20 th century vision of university, created by Wilhelm von Humboldt. I believe that only intellectual traditionalism and conservatism are the cure for contemporary problems of higher education.

Key words: *university, ehtos, value, tradition, humanism, intellect, culture*

Touching upon the issue of this kind, we are aware of both the reasons as well as consequences of a breakthrough, which, together with changes in the field of politics and world-views at the beginning of the 90s, also reached the Polish scientific environment bringing it closer to the cultural heritage of the western civilization. Experiencing values related to the above heritage, not literally but more like spiritually, we observed the emergence of a new scientific institution under the name of a higher education institution. Still, we must bear in mind that the answer to the question about its shape, condition concerning the substance as well as forecasts is not possible without relating to the idea of *universitas* born in the Middle Age and verified by the Arabic idea, known as universal community of knowledge constituting *universalitas*, i.e. that, which laid the foundations of the

enlightened condition of reason responsible for consistent building of cultural and spiritual eminence of Europe for centuries. It is not without the reason that the importance of the above eminence, backed by spiritual unity of our continent, which by joining philosophical enlightenment with university responsibilities extends the interest of individual reason to the whole social sphere. It is also worth remembering that university set in the above sphere does not constitute an institutional tradition embedded in the structural frames of scientific life but rather intellectual format connecting proponents of truth in their superior task of looking for goodness and wisdom. It is also a spokesman of matters, about which we know well that it does not reduce ancient ideals to particular manifestation of live but instead treats it as general form of wisdom. It is a basic condition of that that in order to open university for modern pragmatism of life going beyond mandatory nature of natural sciences it shall take into consideration ethical context of their effect. Only then it is possible to reach a level on which theoretical sense of science allows the understanding of humanistic message.

The point is, however, that in order that the classical sense of truth, goodness and wisdom, so consequently left unsaid in various spheres of social life, might become obligation, each society shall be made to manifest it under threat of ethnical-cultural pauperization. That is why realization of the aforesaid values, their skillful presentation and use and then systematic and persistent multiplication seem to be the fundamental goal. In order for the goal to be fulfilled in a solid and useful way, fulfilling it practically in many ways, experiencing objective truth is supposed to be a fundamental obligation and aspiring after it becomes the highest priority. Hence, in order to capture the broadest picture possible creating institutional conditions for its realization at the same time, we must face rich cultural tradition shaping truth historically. The difficulty of analysis by the use of a short draft makes me solely concentrate on depicting relations of truth with freedom of looking for goodness, which constitutes a task ascribed to universities for centuries.

Spotting the problem, I am aware that - putting it in a platonic way - truth, independence and goodness are to be placed on objective axiological plane. Their inseparability, proved by Pythagoras authority and His school, reinforces theoretical thought in practical space of moral acting. It also confirms the dignity of university as a place synthesizing scientific inquiries with the necessity of pointing out the rules of practical conduct. In addition to the above, it also testifies the unique ethos of university in which freedom of scientific research is a guarantee of truth, life, science, philosophy and art at the same time. All other solutions, among other things, as a result of their ideologization, turned out to be, as history of the last decades shows, completely unfruitful and impermanent. It is then appropriate, negating opportunistic (ideological) character of the truth to concentrate on the solutions which, on account of their philosophical character, testifies for its rationality.

It is to constitute a given form of intellectual monologue giving the mind as well as needs resulting from it the unquestionable primacy. Whereas the postulate of the truth arising from it, confirmed by the enlightened primacy of mind, seems to be the complement to the idea of university. One, however, has to bear in mind that truth will testify the dignity of university on condition that it is free from non-factual pressures, solely on its own way of faithfulness to itself it will fulfill its mission. It

confirms that only after being released from external conditions limiting the functioning of university, can this institution confirm its spiritual autonomy claiming the full right to freedom of research at the same time. On this account, among other things, university should integrate itself around the fields of science, which confirm its spiritual independence. It would be a mistake to expect from non-factual reasons to testify the dignity of university. That is why, even if it may happen that human sciences are unable to defend their political neutrality, let it serve as a warning in order that the dignity of university does not become uncertain and ephemeral values but to become the thing that theoretically and practically results from the depth of its nature. In this way, the concept of freedom about which we said to be an inseparable dimension of truth, cannot get out of the obligatory scopes of rational conduct. It is then difficult to expect from science, being its realization after all, not to lay solid foundations for understanding the future. Doing this, it refers to the past, making from it the basic project of the upcoming times. If university is able to anticipate the desirable tasks only then can this relation integrate university with socio-cultural life.

As the result, the system of values university gains among other things by didactic realization, backed up by the ancient triad of truth, goodness and freedom, seems to be an integrated system. Each, even the smallest intervention in one of its three inner elements, results in its disintegration. If one decides to weaken truth, then goodness is in danger. If goodness suffers, it will impoverish freedom as a result. Finally, if the truth of science, even if only partially, is disrupted by para-scientific experimental search, then goodness is weakened. Then it leads to a situation in which the whole axiological structure is belittled. What shall be done then not to allow such situation to occur? For sure one needs to refer to the dignity of university. It happens because this is a place where given values are buried, the values whose universals, by joining life and science, give priority to philosophical reasoning. The above institution is also a carrier of mission whose history dates back to sources of ancient synthesis of truth-goodness-freedom. The above synthesis, by fulfilling itself in both theory and practice, constitutes modern ethos of university. One of the key questions to be asked is to what extent and scope we should face up to it. For sure to the extent to which political and economic organization of each society should be liable to ethical rights. Without the above, and especially without consolidating social tissue of imperatives of practical philosophy, sensible thinking about the future seems to be impossible. Hence, the requirement for *logos* of life to become its *ethos*, truth to become goodness and goodness to become freedom. It is also worth stressing that the contemplation of the above values should be backed up by a conviction that we need theoretically valuable and practically needed thought about university (being a dispatcher of truth) as an institution, thanks to which the reasoning of truth will become the sign of the highest wisdom possible. By giving truth the features of necessity, we hope to meet the above expectations, which are going to build up the rational judgment of the occurrences of our world. In this sense the power of revealing values will result from the feeling of participation in the intellectual power of university. It seems then that its authority emerging from the spirit of ancient Greek academy, on the pattern of Platonic *paidei*, creates the climate of timeless humanism. In a historical cross-section of the ages it means that social life based on it must create transhistoric

axiology. The given axiology, neither as a whole nor as a part, can otherwise be replaced by a noble vision of postmodern claims to freedom.

The idea of objective value itself functions in order to be able to, contrary to its opponents and after Plato, consolidate the faith in values of the highest rank. They are the only values delivering rudimental truth about human being, who, making their way towards common goodness, is characterized by rational freedom. In this sense the archetype of Platonic *paidei*, perfected through the institution of university throughout the years, has become the universal archetype. The above means that being resistant to the influence of cultural regionalisms, university should shape a fundamental vision of truth as universal value. Only then, out of the truth, will emerge that what, on one hand confirms it historically and, on the other hand, gives durability to principle values. Out of them results, almost forgotten nowadays, the ideal of philosophy (as searching for truth) in compliance with life. This basis, shaped by Socrates in the distant past, demanded that the existential thread to be determined by high principles of intellectual virtues. Out of the *ethos* results the premise that truth and its teaching constitute a midwife like endeavour, which, by testifying obligation of university, creates its authority.

Another obligation is related to the above. The one, which due to the fact of science seen as the truth *per se*, with the proviso that it shall be propagated, constitutes the basic *clou* of the life of university. The above thought nowadays does not seem to get proper understanding and is obscured by common thought that university is related to industry, job market or broadly understood economic indicators. It is then strengthened by the thesis of a productive role of university, which leads directly to a belief that including university to the above trend blurring the boundary between business and truth can become the embers of authentic civilization progress. In a word, it is a bit of an exaggeration to claim the functioning of an academic institution constitutes a prosperous enterprise (let's not be deceived by the definition of department of science as principal organizational unit of each university) definitely losing the thing that does not have its proper equivalent in Polish but what is traditionally called *Wissenschaft*. It is the concept that reflects the fact that testimony to the truths as a superior value above temporary political and economic circumstances shall be manifested and revealed. Along with it a consent to free searching should be given, which only turns out to be effective if possibility of free action is provided. Only this gives enough certainty that relations of science with material basis of its functioning will not turn into submissive relations, in which the dignity of truth will be dependable on opportunistic aims.

It is then worth bearing in mind that logical argumentation of truth should become common obligation of intellect in its basic function of looking for goodness and truth. Serving this purpose, truth becomes submitted to values for which the goodness of entity and the whole of society in the broadest dimension determines the sense of theoretical and ethical actions. Hence, it is difficult to accept the situation in which inductive heritage of empiricism, based on the Anglo-Saxon premise of *Science*, narrows university to the level of a vocational institution, in which economic profitability becomes the only criterion for profiling scientific research at individual departments of university. That is why multiplicity of university faculties seems to be of vital importance taking into consideration the fact that we are currently facing the emergence of very narrow specializations of

teaching as well as accompanying autonomy of knowledge. By letting to preserve a real value and sense of science and rejecting giving up dreams of mercenary education, it negates as completely unjustified a belief that one area of science is more valuable than the other. Domination by any kind of science leads to the upset of the existing balance between them. In consequence, it triggers a condition in which philosophical foundation of truth becomes superfluous. It is quite easy to visualize the results of such conduct.

One of the consequences is undoubtedly the destruction of harmony joining together individual segments of science in basic task of searching for the truth. In case of its destruction it would be impossible to develop science in individual areas of spiritual life of human being. With visible result it would put an end to a possibility of using the results of type of science in others. Meanwhile, as we already know, such situation, only hypothetical, cannot have practical application. The achievements of psychoanalysis, structuralism or the theses of hermeneutics clearly prove that. In some sense it is also reflected by reference of humanistic sciences to environmental sciences. Presenting their correlations, it is worth mentioning that as early as in the 19th century the structure of humanistic sciences dressed in apparel of hermeneutics thinking had little in common with explanatory scientific procedures of environmental sciences. However, with the passing time it turned out that their division, consolidated between the authority of Wilhelm Dilthey and Wilhelm Windelband creates closer relations between them demanding undertaking a sound dialogue. The necessity of the above, after many years of misunderstandings, requires, on the one hand and on the other hand different treating. So, only a just communication creates a chance to overcome consolidated schemata as well as effective reflection of misunderstandings embedded in them. Of course, it also must lead to the change of the existing habits. The resulting context of understanding characteristic of humanistic sciences and the context of explanation appropriate for environmental sciences, each in its distinctiveness, lose the right to exist. We become then the witnesses of supplementing tasks of metaphysics by the philosophy of world outlook, which, a result, creates the *primary philosophy*. Despite the fact that the perspective of its development may seem vague to some, for others they constitute a unique chance for successful development of the environmental hermeneutics. Thereby, spirituality created by the above philosophy, as a matter of fact testifying the dignity of science, does not let the dignity of university based on mutual harmony of environmental sciences and human sciences be disrupted. By complementing environmental sciences with humanistic interpretation of culture we put ourselves in a position in which the values of science will become permanent and common values embedded in the truth of life. Remaining in truth and next to truth will turn out to be effective only when opportunism fails to stay in "the dens" of university. However, it still does not mean that university has to close its door in on life itself. It is true that it does not have direct influence on the course of events, but the issue of their judgment comes under specific system of values. Where, if not on the premises of a respectable university, can it arise and then settle down? Is it not the place where the dignity of truth is permanently retained and maintained? For sure it is, but a dispute over the practicality of scientific research does not lose its meaning. It is enough to say that lack of influence on current events is not going to be onerous, if

we come to realization that it is the science itself that sets a goal to which social needs shall aim at. For sure, we do not need extra justifications in order to point out that only under the banner of truth can the above goal be reached.

After all, only this brings us closer to complete liberation from orders not resulting from rational obligation. There is no doubt that the guarantee of its existence was and still is language as well as world view community, which combines European “republic of scientists” into one, living, cohesive and universal trend of “communicative intellectual community”. Therefore, it is truth itself, marked by *universitas* origin, that created scientific climate of Europe. In order to be able to seriously reform pre-modern universalism, we needed modern modernization processes together with accompanying philosophical understanding. It came to happen among other things due to the reformation and the resulting nationalist tendencies including the emergence of a national state responsible for consolidation of societies into clearly defined national groups building their own cultural identity on the basis of their national languages. Thanks to their dynamics, leading to fast development of literature, art and science, the authorities of the state made rising demand for a highly qualified administration personnel and as a result we could observe inclusion of universities, which constituted central units, in the structures of the state. At that time, as a result of gradual but consistent secularization of public and social life, we can observe the process of connecting their fates with the whole machinery of the political state.

It is especially visible in the situation when universities become a breeding ground for managerial elite, which have to be reproduced for the needs of public life.

The given obligation reflects general direction, which all research centers followed including the Wilhelm von Humboldt University, perceived as the most representative academic institution in the 19th and 20th century Europe. It was the institution that embraced a wide *spectrum* of science, personnel and education policy of a modern state. The hegemony of the Humboldt model, which practically lasts till today with minor changes, has brought to life the institution of “the state university”. Suffice it to say that its structure, which is currently in effect across universities, namely seminar classes, seminars, monographic lectures, dates back to 1799, the year when one of the biggest philosophers, Johann G. Fichte took up the position of the Rector of the university of Jena and issued an edict implementing the above structure, which the Wilhelm von Humboldt University faithfully continued. It is also worth noticing that the gradation of university organizational levels remains unchanged. The aforementioned gradation in its traditional form was implemented by the German Minister of Education in 19th century. Its presence strictly regulated research centers and academies (in contrast to university life) by administrative imperatives issued by countless commissions. How does that compare with the challenges of the postmodern present time in Poland? The question is indeed legitimate, we shall try to give answer to the above question, even if partially.

Along with slow but visible vanishing of politicization and nationalization of university, we can also observe the vanishing of radical universalism of enlightened rationalism. It seems that in times of current globalization national identity ceases to be primary intellectual material, and ideals, which laid the foundations for the project of a national university and matters less and less. It seems that

universalism of another sort takes the place of the above, namely universalism directed inwards, making the idea of university being associated with the processes of a technologically developed society, which narrows knowledge and science to the needs of global market economy. As a result, we can observe a gradual disappearance of that what for Humboldt was the basics of a culturally educated human being namely reference to traditions of neohumanism based on models of ancient culture. One question recurs consequently; if it is possible for the fascination of the Greek culture to find its continuity in esthetic and ethic spirituality of our times. The question is quite important in its nature, as penetrating general educational cycle ranging from the youngest school years to university, it influences the plot and quality of education of modern human being. And this in turn is invariably conditioned by the unity of science and teaching what Humboldt grew into a symbol of the principal idea of university education. In principle, the general concept of university functioning as enclave was supposed to result from the above unity. At the same time it was to be the place where truth was equivalent for ancient tradition, on which it was growing, after all. So, unlike in case of past, comprehensive general knowledge, based on the best ideas of ancient Greek *episteme*, where solid education for the sake of education itself as something superior to with regard to detailed sciences, nowadays university provides relatively narrow competences, on a scale never seen before. Intellectual uniqueness, which usually accompanies this trend, may pose danger of emergence and functioning of society, which from now on, can be called an information-communication society, in which research and education institutions absolutely report to the pressures of economic nature. Hence, the alliance of economy and politics, in fact giving rise to specific structures of “civic society”, becomes at the same time a specific form of “education capital, generating various forms of “academic capitalism”. No wonder that developed countries of Europe (Poland seems to be a disgraceful case as a result of reducing quotas for the development of science), spare no expenses in universities treating them as a great investment of capital, prognosticating hope for lucrative investment for the future. It triggers of a situation, in which nationalization is replaced by liberalization, and Humboldt politicization of knowledge and science by – supranational economy. In fact, the breakthrough in this situation depends on the fact that “paradigmatic revolution of thinking” emerging from it, another after Copernicus and Kant, kind of demythologizes – making use of already worn out terminology Max Weber – the whole modern reality, giving it simultaneously the characteristics of modern thinking and acting, losing at the same time the great tradition of culturally educated society, being the pride of modern Europe, formed, as it is said, by the Humboldt model of university. Its gradual but more and more visible disappearance causes us to the situation in which, instead of reading “the great book of the world” in the privacy of our own office, turned on ancient reminiscences, we discuss its content loudly, publicly and sometimes in a controversial manner. That is why the visible emergence of university, especially in recent times, from the spirit of postmodern globalization are not solely characterized by theoretical nature. Since any interference in the structure of the world inevitably carries in itself an element of survival. It does not yet mean that the general problem of knowledge is narrowed down to natural sciences with possibility of their technical and technological use. Nevertheless,

there exists something that testifies to considerable role of humanistic cognition. The above allows to assume that since the establishment of The Institute of Psychology in Vienna in the second half of the 19th century, initiating arduously but categorically the dynamic development of specialized sciences through the establishment and development of Freud's psychoanalysis, liberating the science of human being from the dominance of pure natural history, critical thought about the world of human life, robed in hermeneutic thinking, much more preferred by German historical school, and less by nomothetic Marburg neo kantism explaining, was at the gates of cultural science perceived just as idiographic science. Resulting in the new vision of the world with historical thinking being the basis for it, they transfer judgment of the world from *a priori* forms of logical-nomological description to cultural plane of historical judgment of phenomenon. Along with it, the need of *historical consciousness* triggers off the need for joining in the current of changes, which are dependent on the strength and needs of substantialist mind but procedural mind. Its eventfulness preceded by extra theological understanding of history, moreover marked by fallibility of events, disrupts rationality of metaphysical certainty, becoming not a system of well-ordered values but more an open project, in which axiological centrism changes into historical interpretation. One does not need a great degree of perception to realize that at least since Dilthey antinaturalistic revolution, hermeneutic reading of Freud, deeply changing the understanding of human being that is a special kind of knowledge, on one hand giving the sense to individual human life, but on the other hand, trying to assign the shape of ethical obligation to modern forms of human communication and cooperation.

Disseminating the above forms, which are straightjacketed by practical knowledge, becomes the primary task of academic didactics. Nowadays universities, like in the past, have an enormous potential of rational enlightenment. But the newly established universalism of "western rationality", which is being put in practice in front of our eyes, constitutes a universalism consolidated in humanistic *ethos* of human and citizen rights in their endeavour to become the citizen of the world. By verbalizing the above endeavour, they become a real confidant of intellectual leadership. Of course, they do lose a lot from their traditional independence at the same time becoming addicted to economical tendencies, but as a result they gain a chance of having influence on the whole economic and political life in the upcoming future. It causes that conditions, which blasted out the monoculture of Christian Europe, nowadays are heading to create new universalism. Still enlightened education is on guard of the above universalism as it is universities with their educational and research structures of area of public discourse that create an institution, which is able to overcome irrational absurdities of social life, causing that *universitas* one more time shall bring back and then maintain *universalitas*. Today's education quite loosely resembles ideals of the old university. Both the notion of mind and truth, goodness and beauty acting on its behalf, has undergone a far-reaching transformation. As a result, on the one hand we experience transversal mind, in which universal categories of truth, goodness and freedom have blurred under specific forms of historical rationalities, and on the other hand, narrativism of hermeneutics together with difficult to reconcile metaphysical

understanding of values. Both in the former and the latter case, it creates an image, in which stable forms of structural mind have been shaped by enlightened Europecentrism through ages, are now giving way to diversification, among which rationality of truth, goodness and beauty is assigned to specific projects of knowledge. Apart from the fact that it creates a need to verify rational standards of science established in ancient times and continued by the tradition of Cartesius and Kant, it also creates a need to verify institutionalized forms of social life in the aspects of science, education and economy. From their point of view, modern concepts of Foucault, Luhmann and Welsch are presented as historically changeable forms of particularity, over which no superior institution has control. Certainly, it means that metaphysics must be replaced by pragmatism, among which the principle of usefulness, as the one, seems to reflect postmodern standards of science and cultural life. And if the role of mind is not definitely questioned on its basis, weakening only its universality, then it means that objectiveness of Platonic values is transferred to different area than before. Resigning from universality and giving way to transversality, in the context of openness to current events of social life, it verifies theory and practice of *wily mind*, in the meaning in which it treats contextuality and perspective as regulative ideas of new metaphysics. As a result weakened objective mind tolerates individual points of view on the basis which is completely devoid of hallmarks of necessity and absolutism. Hence, we can observe lack of axiological synthesis of individual aspects of social life as a part of homogenous understanding of truth, goodness and freedom results in losing traditional function of university. Along with it, university becomes dependent on not only economical tendencies, by creating personnel for economy depending on economic situation, which is, among other things, shaped by enrolment quota at academic faculties, but also on current demographic tendencies creating a new structure of the whole educational system. This - as well as non-existent, both in Humboldt and Heidelberg (based on Humboldt's) tradition of university - technical and empirical shaping of the world, though common nowadays, stands in open contradiction to the goals, which were assigned to a classical idea of university. It is more and more difficult to think that they would be able to, in extent similar to the past, make use of intellectual liberation. More often, being dependent on economical tendencies through economic and political connections, universities are looking for other ways of exploring truth in greater depth. Usually it takes on a form of struggling with progressive irrationality of public life, which is dangerous to university itself as well as institutions being on guard of it. That is why it is very important that looking for new enlightenment in the era of modern globalization is to be accompanied by rational truth.

One has still to remember that the above processes must be accompanied not only by its new understanding but also a new type of activities propagating it, however, by deepening the process of abandoning university dogma, in which searching for knowledge itself was not conditioned by the possibility of instant use, we are condemned to opportunistic accumulation of truth. Today, not mentioning universalism of knowledge as cultural core of educating society, we concentrate on narrow specialties in technical manner, that is in categories of practice interpreting reality. So, it seems that the times, in which cognitive passion (creating the nature of knowledge) of a lonely scientist looking for the sense of the world is sinking into

oblivion. The above is being replaced by “production” of knowledge by specialists of a relatively narrow specialization and often results in the loss of spirit of what is only seemingly perceived as useless and unnecessary. It leads to a situation in which the attitude to science makes knowledge the primary criterion of its social and practical use. “Ordered” by specific institutions appropriating the right to marketing “production of knowledge” only in humanistic sciences it is able to prove its timeless dignity.

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FREE MOVEMENT OF PERSONS AND CURRENT MIGRATION CHALLENGES IN THE EU'S FRAMEWORK

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Abstract

The topic of the article is the EU's freedom of movement rules and the role of the current migration crisis as it play in the discussions. The migration flows are considered as new challenges to internal market, Schengen area and external border management, mainly as the reasons which influence the concept and principles of free movement of persons in the EU legal regulation. We illustrate how the migration flows lead to discussion at the European Union level about the limitations of free movement of persons, contrary to the liberal development in the last sixty years.

Key words: free movement of persons, migration, recognition of qualification, education

Free movement of persons is one of the fundamental freedoms in the European Union single market. This freedom was established by the European Economic Community Treaty (1957) and its development was connected mainly with the proactive approach of the European Court of Justice. This is also confirmed by public opinion survey, when respondents agree with the position, that „EU's freedom of movement provisions” are as much an economic concept as they are a symbol of what the EU represents. Therefore the current situation regarding

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freedom of movement is set within a wider context, arguing that it has been a core feature of European integration (albeit in a weaker form) ever since the foundation of the European Economic Community“[<http://www.lse.ac.uk/europeanInstitute/LSE-Commission/Hearing-4---Free-Movement-of-Persons-&-Migration-REPORT.pdf>].

HISTORICAL DEVELOPMENT OF THE CONCEPT OF THE EU FREE MOVEMENT OF PERSONS

The basic idea and initial justification of free movement of persons was to strengthen the building of common market and to encourage people to travel to find jobs after deconstruction in Europe in the post WW II period. The idea of mobility of persons within the territory of six founding member states should have helped accelerate economies of founding countries as well as to prevent situation as had happened before the WW II.

The system of free movement of persons was at the beginning established in a way to regulate free movement of workers, which should be understood as the part of the common market and the economic character of European Communities, the EU predecessor. It was later spread by the case-law of the European Court of Justice in a way to provide freedom of travelling, working and studying to citizens of member states, as well as family members of EU member states. The territory of free movement was open also to countries and their citizens regarding European Economic Area treaty (EEA) signed between EU and Norway, Liechtenstein and Iceland. “There's also Switzerland, which has a bilateral deal with the EU when it comes to border controls” [<https://www.weforum.org/agenda/2016/09/free-movement-of-people-explainer/>].

While firstly it was introduced as part of the EU internal market it was extended with the Schengen Agreements in 90s. We have to consider its roots, free movement of persons was primarily guaranteed to the EU citizens, later to their family members and now the whole concept is facing the migration and connected movement of persons (workers, asylum seekers, refugees) and their rights. The EU representatives understood, that “It is also inexorably linked to European citizenship. However, real difficulties have affected the free movement of Europe's citizens. Closely associated with the building of the Internal Market it seems to have suffered the loss of impetus by the latter and also the serious consequences of the crisis. It is also struggling due to rising concern about external migratory pressure and the enlargement” [<http://www.robert-schuman.eu/en/european-issues/0312-the-free-movement-of-people-in-the-european-union-principle-stakes-and-challenges>].

Founding treaties in its original version presents regulation of the individual mainly as an economic actor who contributes to the productive process. Follow in the framework of building the single market, the legal system seemed to consider individuals more as production factors than persons. This optic was changes after the adoption of the Amsterdam Treaty, when the humanitarian reasons were introduced as those, which justify free movement across internal borders of the EU member states. Amsterdam Treaty also presents for the first time new ways and regulations of cross-border movement for asylum seekers, refugees and displaced persons [Baldoni 2003]. Situation in the Europe, especially after 2008 and first modern wave of migration flows initiate the work of the European Commission and

member states in relation to existing legislation on protection of external borders in Schengen area.

EU LEGAL FRAMEWORK ON FREE MOVEMENT OF PERSONS AND “EUROPEAN JUDICIAL OPTIC”

The principle of the free movement of workers is guaranteed by the Article 45 of the Treaty on the Functioning of the European Union (hereinafter as TFEU), following by extensive number of secondary law. The Court of Justice of the European Union (hereinafter also as ECJ or European Court of Justice) had adopted huge number of decisions and contributes to wide understanding of free movement in its case law.

At the beginning of the legal regulation in the European Communities rules solely focus on employed persons and job-seekers. The range of persons entitled to exercise the right of free movement of persons was actively spread upon ECJ ruling, as in cases identifying term “worker” (Hoekstra 75/63), and related elements of the term’s evaluation (Case 66/85 Lawrie-Blum, Case 196/87 Steymann, Case 53/81 Levin), or starting to identify specific position of frontier workers (Case C-149/92 Scholz, Case C-212/05 Hartmann) and providing legal protection within the single market of work-seekers (Case C-316/85 Lebon).

The huge number of decisions led to the adoption of secondary legislation, especially Family Directive (2004/38/EC), Regulation No 492/2011 on the right of citizens of the Union and their family members to move and reside freely within the territory of the Member States, which are together with current primary regulation in Article 21, para 1 of TFEU and Article 45, para 1 of the Charter of Fundamental Rights of the European Union understand as legal framework of this freedom.

While the legal framework looks especially after the Lisbon Treaty as the stable one, the development in the member states and also current migration flows influence the work of the European Commission. In 2015 the Commission announced a specific document Labour Mobility Package with the aim to achieve better coordination of social security systems and to review Posting of Workers Directive within the European Employment Services. Building of a strong social insurance system without discrimination based on nationality looks closer after the Package adoption as even before. Unfortunately this Package is not interlinked with the immigration policy, which should reflect the principle of balanced approach, as stated in Articles 79 and 80 of TFEU. According to Article 80 TFEU, „the principle of solidarity requests fair sharing of both responsibility and the financial implications of measures agreed upon between the Member States. After the Lisbon Treaty came in force, the ordinary legislative procedure applies to both illegal and legal immigration policies. Provisional measures, however, to be instituted in the event of a sudden inflow of third-country nationals, are to be adopted by the Council alone, after consulting Parliament“ (Article 78(3) TFEU).

As stated in the annual evaluation report of the Committee on Regions, the European Commission acts actively in relation to migration, when adopted the “Return Directive” (2008/115/ EC), setting out common EU standards and procedures for returning illegally staying third-country nationals, including promoting consistent and fundamental rights-compatible practices, improving

cooperation between Member States and enhancing the role of Frontex (the European Agency for the Management of Operational Cooperation at the External Borders of the Member States of the European Union), which was established in 2004. Moreover, Directive 2009/52/EC specifies sanctions and measures to be applied in Member States against employers, who infringe the prohibition on employing illegally staying third-country nationals. For 2016, the European Commission has announced to review the so-called “Blue Card Directive” (COM(2014)287), which lays down the conditions of entry and residence of third-country nationals for the purpose of highly qualified employment“ [<http://cor.europa.eu/en/welcome/Documents/Update%204%20June%2015/06%20Free%20movement%20and%20migration.pdf>]. This presents the final adopted steps in the moment influencing the substantial legal development in the EU within free movement of persons, including migrants and their family members. Procedural issues were regulated later regarding to the concrete circumstances of the case and the whole legislation process on the EU level was much more sensitive than the “migration legislation” before.

MIGRATION CRISIS AND EU RESPONSE

Since 2014 Europe has been facing a so-called migration crisis, when migrants and refugees coming from Africa, the Middle East, and South Asia “have presented European leaders and policymakers with their greatest challenge since the debt crisis. The International Organization for Migration calls Europe the most dangerous destination for irregular migration in the world, and the Mediterranean the world's most dangerous border crossing. Yet despite the escalating human toll, the European Union's collective response to its current migrant influx has been ad hoc and, critics charge, more focused on securing the bloc's borders than on protecting the rights of migrants and refugees” [Park 2015]. As the migration flows were not eliminated, and political situation in North Africa and Middle East is still very much floating and not stable, the European Commission in relation to more effective management of migration had adopted European Agenda on Migration on 13 May 2015.

The Agenda is built upon four pillars:

- reducing the incentives for irregular migration: the focus is on addressing the root causes behind irregular migration in non-EU countries, dismantling smuggling and trafficking networks and defining actions for the better application of return policies.
- saving lives and securing the external borders: this involves better management of the external border, in particular through solidarity towards those Member States that are located at the external borders, and improving the efficiency of border crossings.
- strengthening the common asylum policy: with the increases in the flows of asylum seekers, the EU's asylum policies need to be based on solidarity towards those needing international protection as well as among the EU

Member States, whose full application of the common rules must be ensured through systematic monitoring.

- developing a new policy on legal migration: in view of the future demographic challenges the EU is facing, the new policy needs to focus on attracting workers that the EU economy needs, particularly by facilitating entry and the recognition of qualifications.

Immediate actions include, among others, increased funding for joint operations and for frontline Member States, an EU-wide resettlement scheme, and operations in the Mediterranean to fight people smuggling” [https://ec.europa.eu/home-affairs/what-we-do/policies/european-agenda-migration_en]. In relation to proper implementation of the Agenda, the European Commission had proposed two implementation packages (one in May and the second one in September 2015) and later also two joint action plans, particularly focused on relation with Turkey (as one of the transit countries) and with western Balkans (both proposals were announced in October 2015).

WHAT DID AND SHOULD DO THE EUROPEAN UNION?

Legal proposals and new legislation presents only formal steps the EU does in relation to guaranteeing of free movement development. The concrete actions and steps look contrary to some of the EU successes in this area. The Schengen agreement is considered generally as one of the biggest success of the EU, when establishing common rules for protection of external borders. Instead of exercise of full range of Schengen area benefits, it became under strict criticism regarding the flow of refugees and migrants into the EU. “From September 2015, the sheer number of new arrivals prompted several member states to temporarily reintroduce checks at the internal Schengen borders. In May 2016, this went further when the Council — acting on a Commission proposal — recommended that five countries reintroduce temporary border controls for up to six months owing to ‘persistent serious deficiencies’ in external border management identified in Greece. While all the temporary border checks have been in line with the rules in the Schengen Borders Code [Regulation (EU) 2016/399 of the European Parliament and of the Council of 9 March 2016 on a Union Code on the rules governing the movement of persons across borders (Schengen Borders Code), which is a codification of Regulation (EC) No 562/2006 as amended], this marks the first time in the history of Schengen that temporary border checks have been instituted on such a scale. A further challenge to the passport-free Schengen area comes in the form of an increased terrorist threat, with the Paris and Brussels attacks highlighting the ease with which suspected and even indicted terrorists entered and travelled through the Schengen area. The ongoing challenges have served to underline the inextricable link between robust external border management and free movement inside those external borders and led to a series of new measures both to enhance security checks on persons entering the Schengen area and to improve external border management” [http://www.europarl.europa.eu/atyourservice/en/displayFtu.html?ftuId=FTU_2.1.3.html].

Although restrictions on borders were of temporary character they negatively influenced freedom of movement. Stricter security controls are also reflected in decreasing number of persons moving in the EU for the primary purpose – economic activity. For this moment we miss statistics on other purposes as the education reasons or other stated in the secondary legislation.

What concrete steps may be presented by the Commission in a way to shift the freedom of movement into the previous state of art and to accelerate again its development? Freedom may be exercised properly conform to provisions of the Treaty on the Functioning of the European Union in secure environment. The reform of the EU Common Asylum system, especially the amendment of Dublin Regulation may help make the system stable in relation to external challenges as well as the other problems national authorities are facing in migration. The financial sources allocated by the Commission to protect external borders are not sufficient, and these should be regarding to principle of solidarity allocated by all EU member states. One of the biggest challenges to freedom of movement is connected also to missing inclusion of migrants and people granting asylum to labour market. Once these persons become of legal status, the EU is obliged to guarantee them complementary rights regarding international legal regulations – in the area of education, social rights and health care. The problems are in the implementation practice, when there are not sufficient financial, personal and technical sources for a proper implementation. The another obstacle is qualification recognition, when especially asylum seekers and refugees are missing documents proving their qualification necessary to initiate process of qualification recognition, as precondition for proper inclusion to labour market in one of the EU member states.

What next steps should be then more done then agreed in legislation? The implementation practice needs again pro-active approach as in the previous period presented by the ruling of the ECJ. Today more than even before, the ruling should be accompanied by the European Commission and member states policies, proper and effective exercise of its competences to achieve common goals as identified and agreed in founding treaties.

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REVIEW

Milan Čáky, *Politický a štátotvorný význam Veľkomoravskej a Cyrilo-metodskej tradície* [Political and state-building importance of the Great Moravian and Cyril-Methodius tradition], pp. 325.

First of all, I have received this book as a courtesy from my colleague, doc. PhDr. Milan Čáky, CSc. He had no intention to ask me for a review. I have decided to do so after reading the introductory part of the book. The rationale for my personal selection is a multitude of logical reasons. First, there is a complete lack of academic and political writings or books dedicated to the political features of the Cyril-Methodius tradition and most importantly their heritage to the country and regions I (we) live in. The second reason is rather simple; I have studied and have been working at the institution that carries the name of both Christian missionary brothers. One of the other reasons is vested in the recent 1150th anniversary of their mission to Great Moravia. For more or less, it is an incredibly interesting publication pointing on the invaluable effect of the early missions to the region of Central Europe with the cultural, political, linguistic and religious legacy.

Most recent books dealing with Cyril and Methodius heritage were published either by historians analyzing their lives and activities during their mission to Central Europe or the other publications have exclusively religious context. The reviewed book combines these approaches and adds the political context and importance. The author has written 325 pages that almost exhaustively confront the Saints' missions with relation to the building of the Slovak history. The book is structured into nine uniformly arranged chapters with a preface both in the Slovak and English language. At the end of the publication we may refer to the list of the most important documents related to then political and ecumenical processes. The list of references also contains multiple sources, from Slovak Christian archbishops to academic scholars and historians at the Slovak Academy of Sciences (including authors Ratkoš, Kučera, Maršina as well as archbishops and cardinals of Slovakia). The reference list confirms the narrative and comprehensive structure of the book itself.

It is important to state that the author of the monograph is not a novice in the research area. Partial results of his current research have been published in three reviewed studies in *Studia Politica Slovaca*, a journal for political science, latest political history and international relations issued by the Institute of Political Sciences of the Slovak Academy of Sciences in Bratislava. Similarly, a foreign monograph has been published by the author in 2013.

The essential aim of the publication strives to examine the political relations established as a result of Cyril and Methodius activities in scope of the political development in Great Moravia. The major part of such relations are developed

multilaterally, but mostly on the level between the Great Moravian Empire and the Holy See, while enabling the progress in the foreign policy of Great Moravia - such as Svätopluk's efforts to gain a state sovereignty acknowledged by Rome. Similarly, the author's approach considers relations between Great Moravia and the internal state power as a part of establishing the power structures by means of promoting sovereign church institutions: Archbishoprics of Moravia and Nitra which serves as the basic link between the throne and Holy See. Another relation is based over the creation of a liturgical language for Slavs, moral and legal norms and Christianity deprived of the political pressure fueled by the Bavarian (East Frank) Episcopal Church. The author stems from these relations as the academic and historical background for his interpretation and thesis construction.

The book is based on a premise that the two missionaries are perceived in our society as those whose task was to introduce Christianity and to carry out the religious process for the Slavonic pagans, firstly to codify the new alphabet, to write liturgy in the language spoken by the people and, importantly, to establish a scholarship system (p. 13). This is also illustrated by the statement: "*The activities of Constantine and Methodius and the task of the Byzantine mission were at first of education, cultural and then of political importance resulting in the state sovereignty of the Great Moravian Empire that at that time was a state of our Slavonic ancestors. This political aim was achieved in the period of Methodius life*" (pp. 13-14). This statement clearly indicates the long-perceived historical, cultural and political legacy of the two missionaries which ultimately resulted in the Preamble of the Slovak Constitution adopted on September 1st 1992.

The first chapter of the book is devoted to the Slavonic ancestry and the influence of the Western Christianity as the central force in development of the civilization progress in the Carpathian basin. Here, the author states that Christianization of the Slavs is a result of a political compromise – *action politicus* in exchange to power influence of the French empire. These activities even predeceased the events of the Great Moravian Empire and have become one of the major cultural and religious contests of those times. The following chapter argues the reasons of the Byzantine mission in Great Moravia from the Christian, educational and political context. The author declares the power delegations and multifocal cultural and political influence from two centres – Rome and Byzantine. Thus, one of the solutions to guarantee the power distribution in the region was to acquire bishops and teachers who would have been able to spread the religion in an understandable way and language to Slavs. The liturgical language had become central issue of the Great Moravian Emperors as well as the political argument. With such arguments a vital role for a written language was essential as well. The second chapter also comprises the early life analysis of both missionaries and the author continues with a comprehensive analysis of the written word – Glagolitic as the result of the Constantine's initiative and invention. This caused a revolution in literacy and education of people. The third chapter rather repeats the progress of the adoption of a liturgical language for the Slavs and the spread of the mission of Thessaloniki bishops but discusses the Papal Bull *Gloria in excelsis Deo*, which officially confirmed the political and cultural reasons of the mission.

The fourth chapter considers the political activism and influence of Svätopluk, the sovereign emperor of Great Moravia. Here we are informed about rather incomplete

and non-comprehensive information on the political career of Svätopluk which is part of a controversy and different understanding among the historians, priests and analysts. The chapter also provides a story-telling method of the historical grievances towards Methodius, his imprisonment and reconciliation of the relations between the French emperors, Great Moravian political leadership and the Byzantine missionaries. The reconciliation is mostly visible in the following Papal Bull *Industriae Tuae* which belongs to the most important documents of the early Slovak history.

The following chapters offer an analysis of the internal and international conflicts over the systematic use of the liturgical phenomenon in Central Europe and ultimately selecting the future steps for the Byzantine mission. The author correctly argues how the betrayal, corruption and failures of individuals endangered the position and status of early Christianity and power distribution in the region as well as the existence of the Empire itself.

Despite the dissolution of the Great Moravian Empire, the legacy of the mission has lived up to date. It had rooted deeply in the Slavonic political thinking as well as the liturgy spoken by the language of the people enhanced the use of the Christian traditions – in the perspective of Slovakia, Poland and Balkan countries at least.

The second part of the book is devoted to the arguments and interpretation of the Cyril and Methodius tradition as a collective identity which is an update to all the writings and historical legacies available. The author quite comprehensively illustrates the memory of the tradition, its political legacy within the Slovak emancipation process in the early 17th century. A very influential eighth chapter directly focuses on the Slovak national emancipation using the sources from Great Moravia and Cyril-Methodius tradition. These activities are inevitably bound with Anton Bernolák, native of Trnava and his struggles for the language, the codification of the Slovak language and its modifications. This had become a source of national defense and identity enhancement during the Hungarian Empire and the group of activists around Ľudovít Štúr in 19th century which ultimately resulted in the adoption of two important documents – The demands of the Slovak nation and the Memorandum of the Slovak nation. This had also been the starting process of celebrating the mission of Cyril and Methodius in Moravia with the inspiration to set up the holiday of their incoming to the 5th of July.

The final chapter discusses the state-creational importance of the Great Moravian and Cyril-Methodius tradition. The Byzantine mission and the bishops had become integral part of the Slovak history, present and future. The first Slavic Pope John Paul II. claimed St. Cyril and Methodius as co-patrons of Europe as their dedication to pan-European perspective of positive influence.

After reading the book I have received plentiful information about the life and career of missionaries, their political and cultural legacies as well as the insights to the creation and investigation of the Slovak and also pan-European cultural effects and deficits. The author has used plenty of information sources including archive materials which are very beneficial to the ultimate contribution of the publication.

The author has proved to be well informed and studied in the respective field and there is hardly any historical imperfection that I would have claimed without being controversial or anti-systematic. The book is an illustration of how deeply the

tradition and work of the missionaries is rooted in the Slavic annals with a more narrow and interpretative influence over the current political and cultural developments in Central Europe and also beyond.

At the end, let me paraphrase the author who quite comprehensively depicts the contents of the book and its philosophy: *“The Great Moravian and Cyril and Methodius tradition had been a source of the Slovak national life for centuries. Both significantly determined the formation and character of the Slovak national culture, and the spiritual and political life of Slovakia shaping the modern Slovak nation as a political platform for the development of the Slovak Republic in 1993”* (p.14).

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