

LOCAL DEVELOPMENT IN THE CENTRAL EUROPEAN PERSPECTIVE

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**MAJOR COHERENCES OF THE CREATION OF SPATIAL
INEQUALITIES**

Spatial differences vs. economic growth

The creation of territorial differences has accompanied the history of human beings, since the migration and the concentration of the population were always due to economic, social or natural factors. Territorial differences in the early history, and later the creation of centrums due to the concentration of natural resources had significant impact on the increase of the gap between territories. Industrial revolution also gave a push to it. Economic crises and world wars deepened the existing spatial inequalities even further. Nowadays, in most of the developing and restructuring economies, spatial and regional imbalances show increasing tendencies in the mirror of economic activities, incomes as well as social indicators. Consequently, it is not surprising that politicians and economists show increasing interest on the increasing inequalities and their spatial dimensions. Increasing inequalities are naturally accompanying economic growth, however, it is debated whether it is a constant or temporary situation and what effect globalization and economic opening have in this regard. The development and economic growth of territorial units are influenced by both the natural environment and the production facilities available. We must not take out and underline only one factor or one certain group of factors (Faluvégi, 2000). In accordance, regional growth and imbalances as well as their causes are interpreted and explained by not only one theory. Agreed on it, economic growth theories have gradually come to the frontline, therefore several growth theories dealt with the factors of the creation of spatial differences.

Firstly, neoclassic growth theory needs to be mentioned. Its starting thesis is that the differences between the production factors disappear due to their mobility. It means that the income differences between the regions have basically impact towards equalization. This theory was interpreted as the theory of mobility of factors between regions in the study prepared by Richardson in 1969. As a consequence of this, according to the neoclassic theories, regions become equal, since the capital move from the regions with low return to ones with high return on investments, while the move of labour is with adverse direction. It moves from regions offering lower real income to regions with higher income (Hansen et al., 1990, Prescott, 1998, McGrattan-Prescott, 2000, Boldrin-Levine, 2002). The interpretation and acceptance of these models, due to the globalization and the

mobility of most of the services, provide increasingly important coherences nowadays, since the economic mobility, which was defined by Richardson in his theory, is still ongoing. Due to the international spreading of global multinational companies, we can observe economic trends that lead to the gradual recession of peripheries and the gradual strengthening of economic centers, thus having adverse effects compared to the ones at the time of the creation of the theory. Regional growth theories originated from neoclassic models, therefore the restrictions and assumptions had to be necessarily adopted. While the total employment, competition and unlimited mobility of production factors can be well explained and interpreted in the closed system of the national economy, we are facing difficulty if they need to be defined in regional dimension (Boldrin-Canova, 2003). There are significant differences existing in the use of production factors in the regions. Oligopolies and monopolies operating in the regions sometimes hinder the unlimited and free movement of resources in several sectors of the economy (Schatzl, 1992). The movement of capital and labour cannot be explained only by the differences in salaries and return on capital. Nowadays, the migration of labour is not only motivated by the differences in real salaries but other factors as well, e.g. job supply, the structure of labour market, subsistence costs, level of urbanization, real estate prices, rents or potential free-time activities, achievable social positions and the quality of education. Keynes, in his study released in 1936, examined the impacts of investments on salaries. He stated that the increase in the total demand is determined by the investments in the rate of savings. The increase in the income generated by one investment or other additional investments was much higher than the amount of investment. In case these factors are lined on a certain area, the creation of economic centers can be observed later on and their exploiting effect can be measured, creating a gravity zone around the centers. Domar (1946) and Harrod (1948) linked the incomes with the capacities and stated that there is equilibrium in the economy if the total demand increases by the same extent as the production capacity. This happens if the effect of the investments on incomes and capacities is the same. Nowadays these factors cannot be described in such a way because in most of the regional developments the concentration of resources can be observed, instead of the equalizing process. Based on the abovementioned, it can be stated that there are two different hypotheses regarding economic growth. According to one of the hypotheses, technological development work under relatively unlimited competition conditions leading to economic convergence. The other statement is that due to naturally spreading modern technologies, it is inevitable to achieve imbalances and divergence in growth after a while (Boldrin-Canova, 2003). Based on all this, we can see that economic growth involves almost automatic creation of territorial differences. If such is not analyzed and monitored continuously, serious territorial inequalities may occur. As examining the territorial growth theories, the

complementary effect by Hirschmann also has to be mentioned. Based on his researches, he came to the conclusion that every investment has forward impacts which is due to the further processing of outputs in related sectors. However, it has other impacts as well which refer to the demand for the products and services necessary for the investment or the investment-generated production. Complementary effect may emerge in the increase of demand, since income generated by the investment encourages the demand for products and services, leading to additional possible investments. Investments carried out in a certain area influence the infrastructural supply, the facilities and institutions availability in settlements, therefore they may generate additional investments to be carried out by the state or the local government, influencing the capacities and incomes and due to their complementary effect, generating further growth (Rogers, 1982, Grossman-Helpman, 1991). Based on the abovementioned, it can be stated that the territorial distribution of investments and their complementary effects and impacts on incomes may result in territorial inequalities, thus creating growth, resource-losing and stagnating areas. Several examples can be mentioned from Hungary. In the growth regions the income level of the population exceeds the national average, the development is dynamic, the volume of investments is gradually increasing and there is a significant export surplus in the local industry. The economic potential of the region results in continuous inflow of production resources through which the resource-exploiting effect of the region is increasing. In resource-losing regions the economic potential is gradually shrinking, the production volume is decreasing, the industrial investments are rare and the mobile production resources flow out of the region. The migration of labour happens in a selective way. Firstly the young, innovative and active population leaves the region. After that due to the decrease in the solvent demand the business sector loses from its significance. Stagnating regions halt at a certain development level and due to handicaps in competitiveness and erosion effects, the economy and society significantly shrink. Several examples can be mentioned from Hungary, where there are several regions with complex handicaps and multi-disadvantageous circumstances. Many of those regions are able even to maintain their stagnating status only with state support. In the development of spatial inequalities modelled by economic restructuring, the creation of export-basis theory was an important milestone. It says that the economic growth of a region mainly depends on the development of sectors producing for export, i. e. the money necessary for infrastructural developments is provided by the interregional demand for the region's economy. In the model of North, American Nobel-prize awarded economist (1955), the export of raw materials with limited availability may create the basis of economic development towards regions with higher development level. Incomes from exports are partly for expanding the export-basis and the improvement of production circumstances. Instruments for investments as well as

services are purchased out of the region, but the boosting of the export induces demand on the regional market as well (e.g. local suppliers). In sectors producing for export, internal and external savings are made which accelerate the growth, leading to the development of local economy (Lengyel-Rechnitzer, 2004). Plants built on the regional demand increase the internal savings, improving the competitiveness of the regional industry mainly in the markets out of the region, allowing the export structure to expand. Due to the diversification processes of the export-basis, the regional income increases significantly (Nikodémus-Ruttkay, 1994). Such growth mechanism – due to the various economic conditions of regions – lead to equilibrium in long terms, since due to the development of local economy and the increase in the standard of living, the take-away/exploitation effect of the development zone also appears. This theory of course may help the economic development of such regions that have their exportable raw materials but in such areas with lack of financial resources, it is difficult to build on. Numerous countries, including Hungary, do not possess many exportable goods, thus they need to find other ways/strategies to develop their economies. In the early 1970s, the global economic conditions changed, since the former sources of growth were exploited, the returns on production capital dropped, thus the willingness to invest moderated. Moreover, the effects of the oil crisis in 1973 were shocking. Increasingly serious tensions concentrated in the economic core areas of major industrial states, partly due to the fact that environmental problems have come to the frontline and partly because of the crisis of traditional production bases (Quah, 1996, 1997, Durlauf-Quah, 1998). In addition, the demand scheme changes due to the growth period, needs change, several new consumption items appear which become natural needs due to the spread of the institutions of welfare society. In this multi-variable system, the use of internal/endogenous potentials and the renewing and development of own strengths were seen as the new regional development strategies in many of the industrial countries (Korompai, 1995). As a consequence of such analyses, bottom-up, endogenous resource-based models have spread, thus bringing the regional potentials and endowments to the frontline of the new spatial policies. Therefore, the aim of the new regional development was not primarily the reactivation of resources of highly-developed regions, but the use of further endogenous resources and additional regional potentials. An important question has also been raised: how can the spatial factors be integrated with efficient allocation in the system of production and activities of a certain region to result in optimal operation under the given economic and social circumstances, since the regional potentials as endogenous resources vary on a wide scale. In a study published in 1990 by Rechnitzer, the starting assumption is that the interpretation of a unit structure of the geographical, environmental, historical, cultural, social and economic factors of a settlement, as well as the influencing factors on their activities may play significant

role in pushing the region on its modernization track. I also consider this approach as the most important phase to moderate the territorial inequalities, since the various internal endowments allow the creation of individual, specific development portfolios as well as the exploitation of various market (even export) potentials. Built on and further developing of all the abovementioned, theories called polarization theories have received larger scope by today. Such theories see the highlighting of diversities and focusing on differences as the nature and feature of developments instead of taking measures towards equilibrium, since

- endogenous growth factors differ (e.g. the quality and quantity of production resources vary, there are various sectorial structures, as well as different consumption and saving habits exist in the different regions),
- regarding the growth factors, there is strong dependence between territorial units (e.g. peripheries depend highly on centers, but we can think of the flow or exchange of services and products as well),
- there are several oligopolies and monopolies on local and regional markets which determine the production structure, the prices, as well as the business relations that become even stronger due to the globalization of the economy.

The followers of the polarization theory see the sectorial and regional polarization as the potentials of development, which occurs in series of imbalances and influences the economic development possibilities of the area. The advancing of growth-pole theory allowed that researchers could recognize clear relationships between economic growth and urbanization, thus we could get a more toned picture about the regional components of development. It is a help to elaborate the regional policy of developing countries, however the simplifications (e.g. assumption of one active center, conditions of receiving innovations, or the determinisms of developments), in my opinion, do not encourage the spread of the theory in practice, but after their acceptance new directions could be defined in development. It is how the centrum and periphery models might have been created as a solution for the problems of developing countries. Such theories mainly originate from Friedmann. His centrum-periphery model takes social, behavioral and political coherences into consideration in addition to economics, integrating the views of former growth models. Friedmann's model has brought new scientific findings, since he elaborated his theory considering territorial approaches. His starting thesis is that human activities and their social interactions restructure the territories, while the features of territories also influence such activities and relations. Development forms the spatial structure, while the spatial relations influence the development (Lengyel-Rechnitzer, 2004). Based on Friedmann's theory, Rechnitzer elaborated a centrum-periphery model, which opens new dimensions to the interpretation of regional economic growth. It is not only dynamizing the innovation, but it integrates the

spatial processes into interdisciplinary context. It proved that spatial inequalities lead to the creation of centrums and peripheries and they form a closed spatial system. Centrums depend on peripheries based on authority and peripheries should concentrate their resources to get over (Rechnitzer, 1994). The recent regional policy of the European Union has been paying increasing attention on the development of rural, underdeveloped areas as well as the efficiency of resource allocation, as it was published in the Barca report in 2009 (Barca, 2009). Fabrizio Barca, Italian economist highlighted the fact that the reallocation of sources should be directed to the old (developed) member states, causing several doubts. Based on all this, the development of innovation potentials of such territories may lose significance due to the use of additional funds, thus the slowdown of the development might be forecasted. At the same time, the withdrawal of funds from the periphery may cause economic and social problems in short terms. Based on the abovementioned, it can be clearly seen that recent economic space-restructuring processes were judged differently, therefore the new economic developments should follow new directions. However, we need to list up all those factors which determine and cause the irreversible break-off of areas in long term, as well as the impossible economic and social survival of the area's population.

Major coherences of spatial inequalities in europe

Spatial processes are interpreted in the European Union as series of long-lasting social, economic, cultural and demographic phenomena, which have area-specific imprint (Enyedi, 2004). According to the duration of their emergence, they can be long and short ones. They are created by the series of decisions made by the determining players of the phenomena: individuals, businesses, institutions, local governments, national governments, international organizations etc. (Farágó, 2007). Due to the continuous spatial changes, the spatial inequalities are inevitable and long-lasting. It is important to note that there have been various social responses to the appearance of territories with unfavourable conditions, including the prevention of migration and the improvement of unfavourable conditions (e.g. isolated location, infrastructural handicaps). General features of disadvantaged areas include poor infrastructure, low quality of services, lack of jobs. Consequently, the unemployment rate is high and the salaries are low. The migration of young generations from disadvantaged rural areas is also a common phenomenon, leading to the unfavourable age-structure in long-terms. Due to the shortage of high quality roads and highways, it is difficult to get access to rural areas, resulting in their isolation from the national economic and social circulation, which can be the obstacle in the new economic development approach. The Hungarian economic restructuring of the 1990s also contributed a lot to the creation of spatial discrepancies, since it was the time when the gap between the dynamically

developing centers and the underdeveloped peripheries speeded up (Dusek, 2001), not to mention the impact of revision of borders at the beginning of the 20th century on the spatial discrepancies. While examining the spatial inequalities, we need to highlight that the two basic components of the spatiality are inequalities and order (Nemes Nagy, 2005). The duality of inequality and configuration are usually equal to the duality in the expressions region and spatial structure (Szabó, 2006). Nowadays, in the researches on inequalities two basic questions are raised: how much are the spatial discrepancies and how do they change? Due to the developed information technology society of the 21st century, there are no places in the world about which we would not have information regarding the environment or the society. This allows the spatial researches to show real results (Jakobi, 2002, Dusek, 2003, Nagy-Káposzta, 2003). The harmonization of spatial elements providing the social basic functions and the social needs was carried out in different ways during the history. Both spontaneous and organized economic/social processes happen in the space used by the population. In one-centered countries, like France, Austria, Hungary, as well as in most of the Central-Eastern-European countries and partly in the United Kingdom there are dominant capitals existing, while peripheries perform poorly, the railway system was developed in a radial structure (serving the needs of the national center, the capital) and the cultural and political functions are also located in the capital (Berend-Ránki, 1987, Horváth, 2004). The rapid development of sectors with high demand of raw materials started in remote areas from former growth centers (Antwerpen, Venice, Florence, Amsterdam, Bordeaux), thus the population of such developing areas (North-and East-Anglia, Lorraine, Ruhr, North-Italy) has jumped. However, due to the migrations, other parts have become uninhabited. Industrial agglomerations in large cities were created at the turn of the 19th and 20th century and the monocentric spatial structure of several countries was also established at that time (Anderson, 1999, Nagy, 2003). Partial regulation of spatial development was included in the program of more and more governments between the two world wars. After the First World War, the new Central-Eastern European countries elaborated concepts to strengthen the cohesion of their areas that used to belong to other countries. Later, the economic depression of the early 1930s provoked state measures and developments in the areas hit by the crisis in Western-Europe and in the United States. The euphoria during the reconstructions after the 2nd World War helped to forget temporarily about the regional discrepancies, but at the end of the 40s overall regional development strategies were elaborated in the market economies. Eastern-European socialist countries also elaborated their own spatial development programs, though much later. The large economic upswing after the reconstructions related to the 2nd World War generated various processes in different parts of Europe. Traditional industrial centers and their regions got modernized, while peripheries lagged

further behind. Population migrating from such areas settled down in the large city agglomerations, increasing the social problems of the conurbation rings (Granberg-Kováč, 1998, Horváth, 1998, Nagy, 2002). The gradual economic development of the 50s-60s, the major political current and economic thinking as well as the economic policy of welfare state opened a new era in spatial development, too. The formerly hidden and “sleeping” spatial development has been replaced by an active state intervention policy. Based on the comprehensive assessment of both theoretical and practical experience of that development period, the tasks and aims of industrial and post-industrial societies have become clear and regional policy has become an important element of social- and economic policy (Yuill-Allen-Hull, 1980, Wadley, 1986). The developed countries have stepped into the phase of so-called structural adaptation. Spatial policies of Central-Eastern-Europe were clearly in favor of cities and against villages because of the ideologically disparagement of the role of infrastructure. Despite of the declarations, they supported the strong concentration of settlement system (Enyedi, 1998). The special characteristics of spatial economies, the concentrated cooperation of locations, the relationships in the settlements, as well as the characteristics of the settlement system expanded the scope of the economy (Illés, 1997, Rechnitzer, 1998). The processes were further accelerated by the fact that the political and economic changes in the Eastern-European countries in the early 90s, created a new situation in the European spatial structure. New markets had to be accessed, transportation networks had to be connected, the elements of the settlement network had to be linked and several other so-far unknown regional problems had to be faced (Nagy, 2009).

Nowadays, the public attention on the spatial inequalities has increased and is increasing in the European Union. The reason is that the discrepancies gradually rise, new forms are created, and thus the significance of spatial policy is increasing (Enyedi, 1997, Horváth, 2003). This general tendency is true in 2014 as well. The multi-stage enlargements of the European Union have brought the issue of territorial inequalities to the frontline. We can state that the economic and social space of Europe is very proportioned. The reasons for the differences in settlement networks, economic structures, education of the population, infrastructural supply are hidden in the history of the continent over centuries (Csite-Granberg, 2003, Nagy, 2009). Recent changes forecast two determining factors in regional policy in the early 21st century in addition to the self-governing rules of the economy: on one hand, the reforms regarding the organization, operation and finances of the European Union as well as its Eastern enlargement. On the other hand - partly due to the mentioned factor - , the creation of new division of labour in the countries and the decentralization (Michalski-Saranceno, 2000). However, the basic aim is

not expected to be modified, since spatial imbalances are the obstacles of economic growth, prevent the improvement of competitiveness, lead to social tensions and restrict the concept of a single Europe. Thus cohesion is the prerequisite of integration, requiring more harmony between the national and community regional policies, therefore encouraging the mutual interdependence. Its creation is mainly prevented by spatial inequalities and the centers and peripheries (due to the discrepancies). So the key issue of regional policy is related to the elimination of peripheral situation.

Major coherences of break off

Nowadays, the economies are undergoing such changes that modify the basis of global economic circumstances, since the former sources of growth ran down, the returns on capital dropped, thus the willingness to invest decreased, moreover, the financial crisis had shocking impacts. In the core areas of major industrial states increasingly serious tensions accumulated, partly due to the environmental problems, partly because of the crisis of traditional manufacturing bases. However, at the same time, due to the growth period of the last few decades, the demand scale and needs have changed, several new consumption goods have occurred that are considered as natural demand due to the spread of welfare state. Along with such globalization trends, significant economic and social erosion can be observed in the rural Hungary. Local communities have gradually lost their institutions which provide services and able to maintain the community, as well as their schools. The transportation infrastructure is run-down, activities based on natural endowments declined, environmental-friendly agriculture as well as the food industry based on traditions almost disappeared and the fund-absorption ability is very poor. Due to the abovementioned, the centrums continuously take the resources away from peripheries, therefore peripheries become poorer and the food-, water-, energy-, employment- and social dependence of the Hungarian society has become increasingly serious recently. Rural life in public thinking is now equal to disadvantaged situation. One basic objective in moderating the spatial inequalities is to reduce the spatial differences and to help the underdeveloped regions to catch up. It has already been mentioned above that several factors influence the spatial inequalities, but if they are present at the same time, it might cause unexpected and unprecedented spatial differences (Figure 1). Numerous analyses and studies highlight one of the most spectacular features of imbalanced demographic trends, namely the ageing of population. Young people sometimes leave regions to find better jobs and higher standard of living, therefore families break up and elderly people need to live far away from their young relatives. The level of qualification of young people staying in the region is basically low and is further decreasing, thus their individual life strategies do not have ambitions.

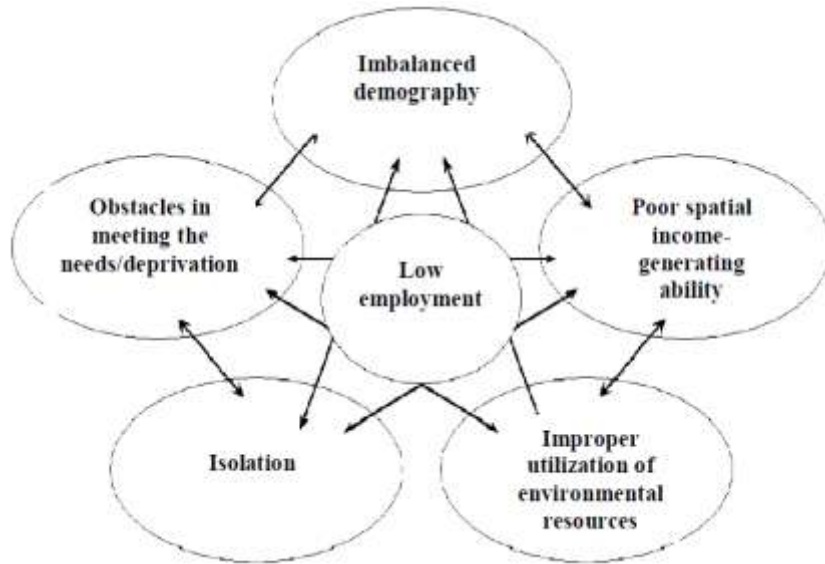


Figure 1. 5 reasons of spatial underdeveloped situation.
 Source: G. Fekete É. (2006)

However, at the same time, there is a special selective immigration to the region, which brings further conflicts and increasingly serious break off to the periphery. Consequently, it causes the spatial concentration of poverty, which sometimes goes along with ethnical concentration. Demographic trends have impact on all of the other factors, since the shortage of qualified labour decreases the spatial competitiveness of companies, it leads to the lack of regional income, poor capital-absorption capacity and the lack of investments. The lack of solvent demand and the inability to meet the requirements of economic scale make it impossible for the local services to survive. The lack of qualifications contributes to the isolation of the region as well. All this is closely related to the ability to self-organization and to the access to communication channels and information. The other key reason of underdeveloped situation is the poor income-generating ability of the region, i.e. the lack of capital and the poor performance of the economy. The limited local market does not allow the local businesses stable operation. They are not able to break into external markets either, since they do not have the necessary capacities and infrastructure. External businesses with a strong capital background do not intend to locate into such regions due to the low qualification of human resource, poor infrastructural background and insufficient business environment.

The problem is not only with the demand. The fundamental problem is that the quality of economic- and service supply of the regions lagging behind usually do not meet the requirements. The income-generating abilities of such regions as well as their income-maintaining abilities due to local purchases make the regions

unable to receive even external funds. The lack of regional incomes affects all the factors which are the causes of underdeveloped character. Since all the abovementioned results in the shortage of development funds, the devastation of physical environment, the difficulties in living and the insufficiency of transportation and communication. The low income of households and the poor quality of services available are the obstacles of meeting the needs. The reasons for low household incomes are the unemployment, the low incomes and the high rate of inactive population. Overall, it can be stated that the greatest problems in the regions lagging behind are the mass and deep unemployment, unmet internal needs, the gradually devastating services, the eroding natural values and the resulting conflicts. In addition, it needs to be mentioned that disadvantaged regions sometimes are not able to adjust to the global trends, thus there is infrastructural and financial insufficiency. Consequently, the catching up cannot be built on single schemes because of the complexity of problems, the various characteristics of regions. Therefore, due to the accumulation of problems, the handling the situation should have several components.

The need for endogenous development

In such a multi-factorial system, new and new development strategies have to be based primarily on the internal, endogenous potentials of the regions, as well as the renewal and development of own strengths. However, a question is raised: what can be expected from developments with bottom-up and endogenous feature? Based on the international and national experiences it can be stated that as a result of endogenous developments, new impulses may reach the target region, thus

- the natural, environmental, economic and human resources form a new unity. The reassessment of such factors may lead to growth.
- such development directions may occur that are able to absorb external sources and integrate them into the region.
- the newly-created jobs produce goods which concentrate income into the region, thus social crisis moderates (migration, ageing society etc.) and the probability of economic and infrastructural break-off drops.

Along with the integration of the abovementioned factors, the region's socio-cultural traditions, as well as the increasing involvement of population in the social decision-making may generate such community development that may lead to the appearance of former unused, unexploited resources.

Conclusions

Based on all the abovementioned, the major aim of the development of rural areas is the use and activation of endogenous resources, the use of spatial potentials. The basic question of development is how can the spatial factors be integrated (with efficient allocation) into the local economy and society to achieve optimal operation under certain economic and social circumstances. In my opinion, the theoretical roots of such developments are hidden in the generative growth concept, saying that local development results, local development capacities lead to the growth of larger territories. Therefore, the local comparative advantage-based economic developments can provide the basis for regional developments. Local potentials, as endogenous resources, vary on a wide range. A starting assumption can be that „a unit system of geographical, environmental, historical, social and economic factors and conditions of settlements and regions as well as the factors that influence the abovementioned conditions” (Rechnitzer, 1990) may play determining role in the modernization of the given area. Considering the system of factors that influence the development, endogenous resources as economic potentials can be related to the factors as listed below:

- capital-potential (available production-base and assets)
- absorption ability necessary for receiving funds
- presence and composition of operation capital
- extra income that can be spent without restrictions
- qualifications, age-structure and other features of labour
- quality of infrastructure
- geographical condition, distance from centurms
- state and quality of the environment, natural endowments
- market relations (demand factors), logistics possibilities, tertiary sectors
- socio-cultural conditions, ethnic and minority issues
- artificial heritage
- decision-making- and institutional system as well as power.

One endogenous factor can be found in another factor as well (directly or indirectly) or it may be created due to the interference of potential-components. In geographical potential the market potentials or relations of a region are already defined. This factor is able to characterize the potentials and barriers of transportation and communication infrastructure. The labour potential originates from the composition of the population; however, it defines the socio-cultural conditions and affects the capital as well. The settlement characters influence the capital potentials and the infrastructure, but have impact on the labour force and the

human dimensions as well. It can be seen that these endogenous factors can also be interpreted individually, but due to their inter-dependence, they have impacts on each other. Moreover, under certain social and economic circumstances, they may start active processes and thus the renewal of the regions (Porter, 1980). Spatial potentials may be related and may build on each other. Such relationships may open new activation scopes and may create additional endogenous resources.

Finally, it can be stated that spatial potentials include all the endogenous resources of regions. Their relationships, coherences, overlappings and networks can offer new dimensions in economic developments in case dynamic interferences are supported by exogenous factors, i.e. due to synergies, spatial renewal may have new development path. Based on the abovementioned, endogenous resources hidden in local characters have significant impact on the economic development of regions, as well as rural economies. Therefore, without strengthening and developing such factors, the economic and social periphery is expected to expand in the future and the spatial discrepancies are expected to increase. Overall, one – however, probably the most important – factor in the catching-up of disadvantaged regions is the local economic development based on endogenous resources.

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TAMÁS TÓTH , CSABA BÁLINT

**RELEVANT METHODS AND PROCESSES IN REGIONAL
PLANNING AND TERRITORIAL DEVELOPMENT**

Nowadays regional planning has gained mainly in relation to defining economic policy related to the improvement of the structure of regional and rural development and the increased tasks of financing these processes. Regional, territorial conceptions are decisive in Hungary and other European countries from the point of view of economic development and the functioning of economy influence EU and national processes. It is important to highlight the multiplicity and diversity of methods applicable to planning and development and to present the correlations between those methods, bearing in mind that this is only the beginning of the work and not the end. It is also very important to bring these issues closer to those interested in this scientific field, and highlight the correlations between the applicable techniques with the purpose of drawing attention to them. The aim of this chapter is to present the methods used in regional planning, programming and development, not only a national, but an international level as well. The main question therefore, is ‘What alternative could we adopt in Hungary in applying regional planning and economic development methods, especially concerning the systematization and systematic application of methods in development processes?’

The regional planning process

Socioeconomic programs cover multiple sectors and different goals. These programs aim at implementing economic and social changes affecting the whole region. To this end integrated strategies should be used that are directed at specific groups (such as communities, enterprises, employees or unemployed people). We must strive for a comprehensive effect by an

adequate combination of the various specific effects directed to different goals.

The complexity of the functioning of modern society and economy raises an increasing number of regulatory issues regional planning and development have become more important the second half of the 20th century. Regional development consists of a series of interventions aimed at correcting the spontaneous processes of regional progress.

Economic and social progress is naturally and in all cases unequal across the various regions, which implies that intervention is usually aimed at reducing regional and social inequalities. Therefore regional development interventions can only be successful if we are fully aware of the processes of the regional progress targeted by the intervention that we wish. The desired intervention is carried out within a suitable organizational and institutional framework, but it must be preceded by a careful and deliberate planning process.

On the basis of the above-mentioned factors, it has become clear that the goal of regional planning (to give as many good things as possible for as many people as possible) can only be achieved or approximated by a well-structured planning process and the use of proper methods, as it would be rather utopistic to assume that this goal can be 'achieved', though this should be our ultimate aim.

As a result of this effort, Tóth (2005), based on the work of researchers, has described the new approach to the planning process, by incorporating a wide range of planning methods and tools applicable for each step of the process; the list of methods is however incomplete, since the list of potential methods is probably inexhaustible and continuously expanding.

This is why we can use in system development the internationally accepted concepts and methods of **Local Economic Development** (LED) to elaborate development programs aimed at implementing economic structural changes and creating jobs in small Hungarian regions. It is with the adaptation of Imre Lengyel that this technique has emerged in the framework of Hungarian regional development, as nowadays; this issue is one of the focal subjects in economic sciences and regional research.

The economic success of any settlement depends today on its ability to adapt to the dynamically changing local, national and international market economy. The systematically elaborated LED is increasingly used worldwide

by settlements that wish to strengthen their local economic capacity in a given sector, and improve the investment climate as well as the competitiveness and productivity of local business sectors, enterprises and workers. The capacity of a community to improve its standard of living, create new economic opportunities and fight poverty successfully depends on its capability to manage LED processes and act effectively to meet the challenges of an increasingly competitive market economy.

LED was developed at the beginning of the 1970s when local governments realized that there was a constant movement of enterprises and capital between the different geographical regions in order to acquire comparative advantages. The fact that local communities assessed their respective economic infrastructures helped them to understand better the factors that facilitated or hindered economic growth and the increase of investments. With this newly acquired knowledge, local communities to develop their economic infrastructure and increase employment through strategically developed programs and projects that helped to overcome eventual obstacles and facilitate investments. Nowadays local economies must face even greater challenges.

LED strategic planning consists of 5 stages, each of them composed of 5 steps. The process is very flexible: any stage can be implemented parallel to another to meet local demands. Problems arising during any particular phase are not, necessarily the result of the current operations, but may originate from a previous stage that was not carried out efficiently. In that case both the previous and the next stages could be reconsidered and revised. LED is typically a 'live' strategy: it has to be modified according to the changing circumstances (Swingburg-Goga-Murphy 2004).

The following section presents the LED system supplemented with method groups applicable for each step of the process in order to facilitate more effective application through the provision of proper tools means and resources.

Local Economic Development (LED) process and applicable method groups

1. Organization

- 1.1. Choosing staff; appointing head of LED working group*
- 1.2. Establishing political policymaking procedure*

- 1.3. *Establishing partnerships between local stakeholders*
- 1.4. *Establishing relationships with various levels of government*
- 1.5. *Assessing organizational competence for devising LED strategies and projects*

Applicable method groups:

- Means of organizing assessment; sociological methods; judgment methods

2. Mapping out the local economy

- 2.1. *Reporting on processes affecting business life*
- 2.2. *Determining and restricting necessary data types*
- 2.3. *Preliminary analysis of collected data, locating information gaps, collecting additional data*
- 2.4. *Devising plan for eliminating information gaps*
- 2.5. *Data analysis, survey on local economy*

Applicable method groups:

- Economic indices; social indices; complex indices; means of organizing assessment; sociological methods; data analysis methods; mathematical and statistical methods; precise methods of parameterization

3. Devising the strategy

- 3.1. *Defining vision*
- 3.2. *Devising strategic goals*
- 3.3. *Devising operative policies*
- 3.4. *Devising programs*
- 3.5. *Selecting projects*

Applicable method groups:

- Means of organizing assessment; sociological methods; data analysis methods; mathematical and statistical methods; precise methods of parameterization; judgment methods

4. Implementing the strategy

- 4.1. *Devising comprehensive strategic LED plans for each program and project*
- 4.2. *Devising a particular project action plan*
- 4.3. *Defining an institutional framework for implementation and monitoring*

4.4. *Having efficient input at disposal*

4.5. *Defining task to be executed in the project action plan*

Applicable method groups:

- Means of organizing assessment, sociological methods, data analysis methods, mathematical and statistical methods, precise methods of parameterization, judgment methods

5. Revising the strategy

5.1. *Defining the 'what', 'when' and 'why'*

5.2. *Monitoring*

5.3. *Assessment*

5.4. *Institutional commissions*

5.5. *Reviewing strategy and planning process*

Applicable method groups:

- Economic indices, social indices, complex indices, means of organizing assessment, sociological methods, data analysis methods, mathematical and statistical methods, precise methods of parameterization, judgment methods

It is worth to analyse more in detail the first stage of the process presented in order to map out the correlations; it is obvious that all efforts must be coordinated during the various steps that may even run parallel. This concerns the 5 main steps, but the elements of step 1 as well.

In the initial phase of the strategic planning process, a person or an organization needs to assume leadership. In practice usually the local government assigns this task to a newly created or already existing department. In other cases a local economic development agency is established, which functions as an independent or semi-independent institution. In many cases the LED working group may even consist of a single person (in such a case the working group can be expanded by training colleagues).

Since LED covers a wide range of activities, it is of utmost importance for working groups to have a loyal and competent leadership. As local governments and less developed regions are typically suffering from lack of resources, there are no sufficient financial resources to implement all measures of the strategy at the same time. Consequently, it is important to

establish adequate priorities, ensuring at the same time the balance in satisfying the different needs. Therefore, a technical and decision-making mechanism must be put in place which sets priorities in line with the given circumstances.

An effective implementation of a strategy requires a firm political intention and support. If local political leaders participate in the elaboration of LED, the resources required for the strategy can be acquired more easily through this support. This means in practice that LED leadership and responsibility are assigned to a local political leader. This process is also supported by the fact that LED strategy reports must form an integral part of the annual decision-making period of the local government and/or local government association.

In our case, the local stakeholders are persons, enterprises and organizations from the private, public and the non-profit sectors that are able to participate in devising and implementing the strategy. These stakeholders should be involved in the entire LED process starting from the elaboration of the strategy to the implementation and monitoring. As a result, we can improve:

- ✓ credibility and equity (the process is public);
- ✓ efficiency (it is easier to understand real economic needs);
- ✓ effectiveness (local stakeholders can mobilize their own resources).

Finally, at the end of the first stage of the process, the competence of the organization to devise LED strategies and projects should be examined, as it is a huge challenge to create a suitable organizational framework for devising and implementing local economic development strategies. The following institutions could be considered:

- ✓ **Notarial bureau or city hall** – Advantage: it gains particular importance as it is supported by the most notable officials. Disadvantage: it is excessively subordinated to the political agenda of the mayor;
- ✓ **An already functioning institution or department** – LED could be subordinated to the main directives of the department;
- ✓ **Establishing an agency** – This solution can create an organizational background sustainable on a long-term as it is not exposed to political processes.

The spider web entropy as a new system analysis approach in regional researches

We are often faced with the question: what makes a development strategy sustainable? What is meant by sustainability, and whether there is a general approach that is suitable to describe the condition of these systems in any country or communities? All areas have different physical and mental characteristics, so a development concept, which is applicable in one country, could harm another country. Rural development can be identified as an interdisciplinary field of science, and it is built by a number of approaches due to the complexity of synthesized disciplines. These approaches often have roots in system theory, there is a strong need for their summation. The system theory is not a tool for development, but rather an approach to see the development processes differently. Not a single development can generate resounding success for a region or local area if the intervention was not prudent enough. The outcome of actions and reactions can be realized in numerous forms, so it would be impossible to model all the combinations, therefore a common approach is needed, which could serve as the basis for each intervention. No perfect formula exists for development ideas, and individual measures cannot be specified, namely it is easy to create distortions in communities with different problems.

The number of observed systems is infinite, so it is very difficult to categorize the types of systems. System theory is applied in many areas of science, and each science improved it in the direction of their own requirements. The system is a multitude of individual elements closely or loosely coupled. The connection can be regular or irregular, visible or invisible, positive or negative. The characteristics of the entire system are not determined by the separate attributes of individual parts and some traits may conflict with the whole system's characteristics. The parts are the elements of the system, but overall the system is determined by the behavior of links and relationships between the elements. Further, when we talk about a system, this definition is valid for system.

Due to the complexity of regional disparities it is not appropriate to start the investigation on the basis of a typical economic feature. Nagy and Káposzta (2006) point out that for instance the GDP calculation methodology is hampered by serious constraints under a certain regional level. According to Cypher-Dietz (2009) the income inequality is an inadequate indicator to determine the regional differences, since it is also influenced by other factors. Therefore, it is necessary to develop a complex system-based methodology, which takes into account the above-mentioned characteristics (Goda, 2012).

Two general approaches can be determined for studying the systems, the cross-sectional and the development approach. The cross-sectional approach analyses the relationship between two or more systems. It tries not to explore the detailed function of each systems, but also the relationships of various systems. The cross-sectional system-analysis approach helps us to understand the various outputs of relations and interactions between systems, highlights the importance of harmony between the various systems, and the constraints of economic, social and environmental systems' growth. The development approach tries to define the possibilities of change within a particular system, reveals that improper interventions can cause distortion in the system, and illustrates how the interventions in other subsystems affect the other subsystems. Examination and evaluation of the systems' subsystems can be made with functional, holistic and reductionist approach. The functionalist study approach is curious as to what larger system the given system can be the subsystem of, so tries to define functions in the system. When formulating the developments defining the functions within the system is essential. In order to let our development resources prevail in the most efficient way, we need to understand the function of the systems' subsystems and the potentials within. The holistic approach highlights the complexity of an area, and helps to ensure the system as a whole to be interpreted. The theory tries to take into account all the system elements involved in the developments, and seeks to describe the elements of these systems combined. It aims to understand the whole thing. The reductionist approach looks into the depths of the system, examines the subsystems of the system separately, divides the system into components, and attempts to formulate development plans from the aggregation of components. The depth-analysis of the components helps to find the smallest system-element that is worth investigating, and from the properties of this smallest element we can infer the characteristics of the other elements within the system. All the three approaches interprets the system as a subsystem, and is aware that the examined system is a subsystem of a larger system. (Walonick 1993, Goda 2012).

The general spider web theory

The spider web theory can be perceived as the synthesis of the five system analysis approaches. Let us consider a local community to be located in the center of the web and directly connected to five pillars. These five

pillars provide the spider-web of the local community. The pillars are the following: tourism/extern relations, social activity, local economy, infrastructure and environment. Each pillar is regarded as an open system that is able to interact with the environment, to influence, to absorb impacts.¹ These pillars are concatenated together like a spider's web. Let this spider-web be a new open system whose subsystems are the pillars.² If we want to implement development in a local community, we are not allowed to deal only with a single pillar and develop only one, because it will open up the web.³ The harmony within the system is sensitive, and due to a careless intervention this harmony disappears from the system. In other words, the spider web of the community behaves as sensitively as the real system. If a subsystem is touched in this system, it impacts the other subsystems and thereby alters the transformation process of the whole system. 'Something little like a butterfly's wing stroke can cause tornadoes on the other half of the world.'⁴ The systems are connected by three elements: the objective, the subjective and the adjusted cohesion. The sum of these specifies the transformational ability of the complete spider-web, the structure of these gives the spider web's orderliness (entropy). If the web is broken or the elements do not function properly, the transformational ability of the entire system is reduced. It does not mean that the system cannot operate, but rather that the system operation is not sustainable. These items should be examined and the status of each pillar to be mapped before starting the development. If we intend to understand the functioning of the web, it is important to find an entry point on it. Social activity is the most suitable for this. Social activity presupposes heuristic self-organization capabilities, such as in the case of endogenous development. If a community does not have a minimum of self-organization ability and willingness, the question arises that the development is worthwhile to get started at all, as if the development of a local community takes place without the presence of internal demand, there is a danger that this intervention does not lead to sustainability of the for the community, but rather to cause dependence. The exclusive exogenous development can cause damage in the community, and changes the sensitive

¹ The adaptation of functionalist system analysis approach

² The adaptation of holistic system analysis approach

³ The adaptation of development system analysis approach

⁴ The chaos theory deals with such simple non-linear dynamical systems, whose behaviour can not be predicted for a long time in advance, despite the decisive deterministic regularities. Such systems are sensitive to initial conditions, such as the butterfly effect.

circumstances. The development has to have socio-economic influence, which brings the local community together, involves local businesses in the economic cycle, activates local knowledge, creates unique specialties, raises local heritage, achieves the equality of opportunities within the population and reduces the differences between the developed and undeveloped areas. Each pillar has its political, economic, social, technological and environmental dimensions, of which the sustainability of pillars can be determined (Goda, 2012)⁵

Defining each pillar of the web is essential. Each pillar has its function within the community cobweb. The system of the external links is an open system because of its connection to the environment. As the tourism is strongly influenced not just by its environment, but the tourism itself has left its mark on the environment, therefore we can talk about input and output effects. Tourism is an open system composed of several elements, in relation to the wider environment. (Kovács, 2003a) The individual elements are functionally and spatially ordered, are related to the physical, technological, social, cultural, economic and political factors. The travelling people form the dynamic element (Black, 2006). The main role of external links in the local communities is the intake of external energies and materials. Many Hungarian researchers (Kovács 2003b, Dávid et al. 2007, Tóth–Dávid 2010) draw attention to the merger of the potentials of tourism and accessibility, namely the contact with the external environment. Both financial and mental refreshment will be resulted for the spider web. It inhibits isolation processes, helps the integration to external economies and societies. The social activity is a kind of abstract system which functions as an input port of the web. The level of social activity can be considered as a synonym of disposition to endogenous development. The social activity acts like a spider on the cobweb. It is responsible for the continuous development, if there is a damage to the web, then this is the pillar which can rectify the fault. The formulation of requirements condenses in this pillar, it plays a decisive role in the functioning of internal energy flows, the feedbacks happen in materialized form, as actions in this pillar. The social activity is only able to fill the role of the spider if confidence works within the pillar. In the local economic system the elements interacting with each other create the feature that the system is able to pursue an economic activity. So the local companies, businesses create local economic systems (Szakál 2000). Local economic system is organized by the local businesses. This pillar gives the pulsation, the achievement of better living conditions in the spider's web. Infrastructure is the system of all devices and networks which are required for transport and communication, so it is the system of terrestrial

⁵ The synthesis and adaptation of cross-sectional and reductionist system analysis approach

transportation, shipping, air freight, water and power distribution and communication networks. Furthermore, this pillar includes the primary supply systems, so particularly the libraries, internet cafes, medical centers and the postal service. The development of the infrastructure pillar is the most spectacular. Therefore, this pillar should be handled carefully. The rupture of the spider web can be caused the most easily by the fact that the infrastructural developments are not consistent with the other pillars. The environmental pillar is closely related to the natural environment. The regularities of the pillars are different as the functioning of local economy. The environmental pillar is not only meaningful to rural areas, urban communities have such a subsystem (Goda 2012).

Case study exemplified by the micro-region of Veresegyház (Goda- Tóth 2013)

The selected case study illustrates the new methodology using the example of Veresegyház micro-region. Several reasons supported the presenting of the case study of Veresegyház. Our geographical binding to the area is very close, and the detailed empirical researches following the situation analysis were thought further in this micro-region. After the situation report we received request from the leadership of the micro-region for pursuing further investigation. Our goal is not to describe the micro-region in detail, but rather to introduce the new methodology through the example of the micro-region.⁶ We consider the clarification of this logical framework very important.

Evolving of the input circumstances

To select the indicators we elaborated such an expert method, which interprets the primary and secondary meaning of the basic data collectively, and which can be easily supported with the regional databases. The theoretical background was provided by the basic principles of the reductionist system analysis, according to which we need to find the

⁶ The situation exploration methodology was tested in every NUTS 2 region (in a total of 23 small regions: Dabasi, Gyáli, Aszódi (2008); Rétsági, Budaörsi (2009); Téti, Edelényi, Ceglédi (2010); Gárdonyi, Gyöngyösi, Kecskeméti, Kőszegi, Szekszárdi, Szobi, Váci, Veresegyházi, Szolnoki (2011), Kisteleki, Tamási, Mezőcsáti, Sárospataki, Dombóvári, Mórahalmi (2012)).

characteristics from whose status we can infer to the operation of the subsystem, and by the evaluation of these characteristics we can describe the function of a system. We determined 16 characteristics for each pillar: with 8 pieces of internal basic indicator and 16 pieces of external indicator. So in all there are 40 pieces of internal and 40 pieces of external indicators in the spider web. In any case the objective indicators (primary content) come from settlements' databases, which are aggregated on micro-regional level. Based on the secondary content of the indicators we developed another database. On the principles of the functional system analysis approach it is necessary to be able to reflect the opinions of the local actors in the situation analysis in addition to the objective statistical data. Not only to draw conclusions from the basic statistical data, but to rely on empirical experience.

In the micro-region of Veresegyház eight settlements are located⁷, all of which were included in the research. The questionnaires were not targeted at the entire population, but at the actors who can actively shape the future of the region. Three segments got the request by settlement: local governments, entrepreneurs and civil organizations (foundations, associations, local action groups, churches). The response rate was 20%, which can be regarded as sufficient in the view of the research. Although Veresegyház plays an important role in the life of the micro-region, it was over-represented in the responses, which is decisive for the future evaluation of the results.

The objective regional indices and sub-indices of the pillars

From the forty selected, previously projected indicators we formed sub-indices. The objective regional index (ORI) shows the relative position of the studied small-region's indicator value within the region where the small-region is located. We defined the relative position as we extracted the minimum of the values of small regions located in the region from the value of indicators of the studied small region, then we divided the obtained value by the difference of the maximum and minimum of the values of small regions located in the region. The ORI becomes dimensionless by this operation. The so-obtained value is between 0 and 1.

⁷ Csomád, Erdőkertes, Galgamácsa, Órbottyán, Vácegres, Váckisújfalu, Vácrátót, Veresegyház

With this operation it is possible the indicators to be compared and to define their relative position within the region. The relative position shows the objective saturation of each sub-index. Similarly to the researches of Obádovics-Kulcsár (2003) and Lipták (2009) our methodology differs from the methodology used by UNDP and the international scientific literature. Predetermined values at international level were not given as minimum and maximum, but we used extreme values in a particular territorial unit as base. Some experts (Husz 2001, Kristóf 2008, Lipták 2009, Mozsgai 2011 etc.) call this process normalization, but statistically this calculation is much more regarded as standardization of data items for the extent of deviation. By default, a value close to 1 indicates the high development level of the territorial unit's sub-index, whereas the value close to 0 means a low level of development.⁸ Due to the fundamental properties of them, certain indicators with lower values are considered as preferable ones (e.g. unemployment rate). Therefore, these indicators' result of basic ORI calculation has to be extracted from 1. The so-obtained value becomes comparable with the values of the basic case.⁹ When investigating the small region of Veresegyház, in five cases¹⁰ the opposite meaning had to be formulated for the ORI, and it had to be withdrawn from 1. There are some special indicators, in case of which it can not be determined clearly whether the high or the low value is considered to be appropriate, in these cases a theoretical optimal value has to be determined. Our earlier researches confirm that the most advantageous for these special indices is to determine a point of theoretical optimum at first. Two basic cases have to be distinguished: the first case, when the indicator is

8

$$ORI_{p_{ij}} = \frac{X_{p_{ij}} - X_{p_{imin}}}{X_{p_{imax}} - X_{p_{imin}}}$$

where: $ORI_{p_{ij}}$: The j objective regional subindices of pillar i

$X_{p_{ij}}$: index value j of pillar i in terms of microregion in the researched region

$X_{p_{imin}}$: The minimum of index value j of pillar i in terms of microregion in the researched region

$X_{p_{imax}}$: The maximum of index value j of pillar i in terms of microregion in the researched region

$$^9 ORI_{p_{ij}} = 1 - \left(\frac{X_{p_{ij}} - X_{p_{imin}}}{X_{p_{imax}} - X_{p_{imin}}} \right)$$

¹⁰ Number of registered job seekers, Number of job seekers registered for more than 180 days, Number of permanent migrations, Total expenditure for regular social aid, Nature conservation penalty + environment protection penalty

below the theoretical optimum, in which case the theoretical optimum will be the maximum value applied in the basic formula; the second case, when the indicator is higher than the theoretical optimum, this time the theoretical optimum will be the minimum value in the basic formula.¹¹ After the calculation of each sub-index every pillar's objective regional index can be defined. The ORI of the pillars can be expressed as the arithmetic mean of sub-indexes formed from indicators belonging to the particular pillar, which determine the objective saturation of each pillar.¹²

Table 1: The applied basic data for ORI calculation

Pillar	Dimension	Indicator	Data-owner/Database
ENVIRONMENT	Political	Houses involved in selective waste collecting	KSH TSTAR (2009)
		Number of houses involved in regular waste collecting	KSH TSTAR (2009)
		Communal tax of enterprises	TÁKISZ (2009)
	Economic	Sum of KEOP payments from 2010	NFÜ (2011)
		Utilized solid waste of settlements (total with recycling, composting, energy use) / Total amount of removed solid waste of settlements	KSH TSTAR (2009)
	Social	Number of houses involved in regular waste collecting	TÁKISZ (2009)
		Environment protection penalty + nature conservation penalty + soil burden fee	KSH TSTAR (2009)

¹¹ if $X_{p_{ij}} < X_{p_{iEO}}$ (theoretical optimum), then $ORI_{p_{ij}} = \frac{X_{p_{ij}} - X_{p_{imin}}}{X_{p_{iEO}} - X_{p_{imin}}}$, if $X_{p_{ij}} > X_{p_{iEO}}$ (theoretical optimum), then $ORI_{p_{ij}} = \frac{X_{p_{ij}} - X_{p_{iEO}}}{X_{p_{imax}} - X_{p_{iEO}}}$ where: $X_{p_{iEO}}$: The theoretical optimum of index value j of pillar i in terms of microregion in the researched region

$$^{12} ORI_{p_i} = \frac{\sum_{i=1}^n ORI_{p_{ij}}}{n}$$

where: ORI_{p_i} : objectiv regional index of pillar i

$\sum_{i=1}^n X_{p_{ij}}$: Sum of indices of pillar i

n: Number of indices in pillar i

INFRASTRUCTURE	Technological	Secondary public utility gap: number of houses connected to public sewage system, number of residences connected to public drinking water pipeline network	KSH TSTAR (2009)	
	Political	Territory of protected natural areas	KSH TSTAR (2009)	
		Length of the fastest route to motorway junction in case of optimization by time (km)	Geo-X Kft (2010)	
	Economic	Footpath and pavement	Magyar Közút Nonprofit Zrt.	
		Number of post offices	KSH TSTAR (2010)	
		Number of other groceries	KSH TSTAR (2008)	
	Social	Number of pharmacies	KSH TSTAR (2010)	
		Number of unemployed vocational school, technical school and high school graduates	KSH TSTAR (2010)	
	Technological	Average travel time of the direct bus lines to the micro-regional center	Geo-X Kft (2010)	
		Number of signaling home assistance recipients	KSH TSTAR (2010)	
LOCAL ECONOMY	Political	Business tax	TÁKISZ (2009)	
		Own current income - revenues from institutional activities	TÁKISZ (2009)	
	Economic	Number of registered business entities	KSH TSTAR (2009)	
		Own current income - VAT revenues	TÁKISZ (2009)	
	Social	Number of petrol stations	KSH TSTAR (2010)	
		ROP payments - economic development (2007-2010)	NFÜ	
	Technological	Number of internet subscriptions	GKIE NET Internetkutató és Tanácsadó Kft (2009)	
		Number of job seekers registered for more than 180 days	KSH TSTAR (2010)	
	SOCI AL	Political	Number of registered non-profit organizations	KSH TSTAR (2010)

	Number of family assistance services	KSH TSTAR (2008)
Economic	Number of nurseries (local governmental, private etc.)	KSH TSTAR (2009)
	Number of public educational institutions	KSH TSTAR (2010)
Social	Migration balance	KSH TSTAR (2010)
	The average number of regular social assistance recipients (excluding the data of on-call recipients)	KSH TSTAR (2010)
Technological	Number of daily direct lines to the micro-regional center	Cdata Kft. /Volán (2009)
	Number of General Practitioners	KSH TSTAR (2010)
Political	Number of historic preservation areas	Kulturális Örökségvédelmi Hivatal (2009)
	Own current income - local taxes - touristic tax (after residence + after building)	TÁKISZ (2009)
Economic	Total number of places in commercial accommodations	KSH TSTAR (2009)
	Number of guestnights in catering	KSH TSTAR (2009)
Social	Number of cultural events	KSH TSTAR (2009)
	Number of playgrounds, sports fields and resting places	KSH TSTAR (2009)
Technological	Number of restaurants and pastries	KSH TSTAR (2009)
	Length of bicycle road	Magyar Közút Nonprofit Zrt.

The subjective indices and sub-indices of the pillars

The essence of the subjective regional index (SRI) is each indicator to be commented by the local actors. The questions ask about the secondary content of the indicators, which have to be evaluated by the respondents on a scale of one to four. From the results of the questionnaires we calculate the SRI. For each question we sum the results of the responses, from which we extract the multiplication of the minimum value and the number of completed questionnaires. We divide the obtained value by the difference of

the multiplication of the maximum value and number of filled questionnaires and the multiplication of the minimum value and number of filled questionnaires. The resulting value falls between 0 and 1.¹³

Table 2: The questions asked in the questionnaire for SRI calculation

Issue	Question
Environment	How satisfied are you with the locality's selective waste collection?
	How do you evaluate the environmental investments in the locality?
	How typical is the pollution in the locality?
	How do you evaluate the water and sewage network's level of development in the locality?
	How do you rate the locality's environmental policy?
	What is the level of waste recycling in the locality?
	How satisfied are you with the waste treatment in the locality?
	How do you evaluate the nature conservation areas in the locality?
Infrastructure	How easily can the nearest highway be reached?
	How do you rate the availability of postal services in the locality?
	How satisfied are you with the availability of pharmacy services in the locality?
	How easily can Veresgyház be reached by public transportation?
	How appropriate is the roads' pavement penetration?
	How proper are the locality's everyday shopping facilities?
	How does the population's educational level correspond with the labor market demand of the region?
	How resolved is the social/health care of the elderly residents in the locality?
Local economy	How do you evaluate the local government's tax policy? (Primarily taxes for businesses in mind.)

¹³

$$SRI_{p_{ij}} = \frac{\left(\sum_{j=1}^n X_{p_{ij}}\right) - X_{p_{imin}} * n}{(X_{p_{imax}} - X_{p_{imin}}) * n}$$

where: $SRI_{p_{ij}}$: The j subjectiv regional subindices of pillar i

	How business-friendly is your locality?
	How is the area covered by petrol stations?
	How affordable do you consider the internet subscriptions?
	How do you rate the management operations of the local government?
	How do you judge the trade in the locality?
	How effective are the economic development programs?
	How do you judge the employment situation in the locality?
Social activity	What do you think about the activities of local NGOs?
	Are women's conditions of employment proper after childbirth?
	What is the impact of the immigrants on the life of the locality?
	How resolved is to achieve the locality by public transportation?
	How can the family support service provide the needs of people contacting them?
	How do you evaluate the functioning of community cultural centers?
	Assess that to what extent are the people in need for regular social aid?
	How proper can the GP of the locality satisfy the local needs?
Tourism	How satisfied are you with the tourist attractions of the locality?
	How do you rate the accommodations available for the visitors?
	Are you satisfied with the cultural programs held in the locality?
	How do you rate the catering units located in the village?
	How does the local government make the operation of tourism enterprises favorable?
	How attractive is the locality for foreigners?
	How is the condition of the public spaces (playgrounds, sports fields etc.)?
	How do you rate the locality's supply of bicycle roads?

After the calculation of each sub-index the subjective regional index of all pillars can be determined. The SRI of the pillars can be expressed as the arithmetic mean of sub-indices formulated from internal indicators belonging to the particular pillar, which determine the subjective saturation of the individual pillars.¹⁴

¹⁴

$$SRI_{p_i} = \frac{\sum_{i=1}^n SRI_{p_{ij}}}{n}$$

When determining the different regional indices, many problems have to be eliminated. Since each regional index is based on the dispersion extent, those indicators for which the minimum and maximum value were equal, had to be replaced by another indicator, as it makes no sense to carry out standardization to the zero dispersion extent. One of the dangers of standardization to the dispersion extent that the outlier extreme values can distort the specific sub-indices. Previous researches prove that the higher level we put our basic indicators, the less such outstanding values occur. Of course, the control of sub-indices is inevitable, but the outliers can be resulted from the number of phenomena, e.g. from the data entry, the unconventional activities or missing data series. The outlier may imply that the basic property of the indicator has not been properly defined and its aforementioned special theoretical optimum should have been determined. In this case we have to look up the theoretical optimum and perform the calculation again.

In the case of subjective regional sub-indices the dispersion extent has to be determined as the multiplication of the difference of the possible minimum and maximum values with 'n' (the number of respondents). If we do not use this calculation, it can easily happen that the dispersion extent takes the value 0. In this case the standardization to the dispersion extent also makes no sense.

The adjusted regional indexes of the pillars

The adjusted regional index (CRI) is calculated from the geometric mean of the objective and subjective regional indexes. The CRI is suitable to synthesize objective and subjective statistical data. The joint interpretation of ORI and SRI provides a more accurate image of the situation of the small region. We consider the information content held by the ORI and SRI equally important, so we regard the two indexes as equal. Using geometric mean is more preferable than the arithmetic mean, since the geometric mean calculation takes into account the distance between the two data. If the distance between ORI and SRI increases, we obtain a smaller and smaller

ahol: SRI_{p_i} : subjectiv regional index of pillar i

$\sum_{i=1}^n X_{p_{ij}}$: Sum of indices of pillar i

n : Number of indices in pillar i

value than the arithmetic mean. It points out clearly that not only the arithmetic mean of the two values is important, but how much the two values differ from each other. The more discrepant the two indices are, the lower the adjusted saturation level of the investigated pillar is. In theoretical case it may happen that the value of ORI_{pi} and SRI_{pi} does not comply with the basic requirements of geometric mean calculation, in which case arithmetic mean calculation should be applied.¹⁵

Correlation analysis

By correlation calculation we look for the answer that what linear relationships are there between the internal regional sub-indices (ORI, SRI). On this basis we examine the objective and subjective cohesion separately. With this calculation we can find answer for two fundamental questions. The first is that whether our basic data were properly selected, as if there are a significant number of $|r|$ values above 9 between the data series, it means that there are too much indicators between the basic data explaining each other. Second, what is the average correlation between an indicator and a pillar.

Objective cohesion

The objective cohesion expresses that how strong is the relationship between the statistical data (base of objective regional sub-indices) of the pillars. As the result of correlation matrix the correlations of the indices are not taken into account within a pillar, as the aim is to determine the strength of relationship between each pillar, and not to determine the strength of relationships within the pillars. The obtained 'ri' values appear as weights in determining the relationship between two pillars. We express the relationship between two pillars as the multiplication of the objective regional sub-indices and the associated 'ri' value. Thus, the relation of two pillars can be described as the mean weighted with the given 'ri' value of 'n' number of

¹⁵ If it is true that $ORI_{Pi}, SRI_{Pi} \in R_0^+$ és $ORI_{Pi}, SRI_{Pi} \in Z^+$, then $ARI_{Pi} = \sqrt[2]{ORI_{Pi} * SRI_{Pi}}$
if it is not true that $ORI_{Pi}, SRI_{Pi} \in R_0^+$ és $ORI_{Pi}, SRI_{Pi} \in Z^+$, then

$$ARI_{Pi} = \frac{ORI_{Pi} + SRI_{Pi}}{2}$$

where: ARI_{Pi} : the j adjusted regional subindices of pillar i

ORI_{Pij} : the j objectiv regional subindices of pillar i

SRI_{Pij} : the j subjectiv regional subindices of pillar i

OR sub-indices. On this basis the objective cohesion (OC) of two pillars can be expressed by a multi-step calculation. After completion of the correlation matrix the first step is the determination of the indicators' average correlation with another pillar.¹⁶ With the help of average correlations and previously calculated objective regional sub-indices the objective cohesion of two pillars can be written.¹⁷

From the correlation matrix calculated from objective regional sub-indices it can be diagnosed that the value of |r| value were higher than 0.9 in four cases of sub-index relationships.¹⁸ In our opinion these |r| values can be explained professionally, and the replacement of sub-indices is not necessary. Although statistically strong relationship has been diagnosed between the various sub-indices, as such they highlight different problems.

Subjective cohesion

The subjective cohesion (SC) expresses that how strong is the relationship between the data (the base of subjective regional sub-indices) of the pillars originating from questionnaires. The conceptual process of the calculation of subjective cohesion is the corresponds to the calculation of objective cohesion. We calculate the 'ri' values from the correlation matrix created from the responses to the questionnaire. The relationship between two pillars is expressed as the multiplication of each subjective regional sub-indices and the associated 'ri' value. Thus, the relation of two pillars can be described as the mean of 'n' numbered SR indices weighted by the specific 'ri' value. The method of 'ri' value's calculation is identical to the

¹⁶ If it is true that $rp_{i_j-p_{j_i}} \in R_0^+$ és $rp_{i_j-p_{j_i}} \in Z^+$, then $\bar{r}p_{i_1-p_j} = \sqrt[n]{\prod rp_{i_1-p_{j_k}}}$; if it is not true that $rp_{i_j-p_{j_i}} \in R_0^+$ és $rp_{i_j-p_{j_i}} \in Z^+$, then $\bar{r}p_{i_1-p_j} = \frac{\sum_{i=1}^n rp_{i_j-p_{j_i}}}{n}$

¹⁷

$$\overline{OC}p_{i-p_j} = \frac{ORI_{p_{i1}} * \bar{r}p_{i_1-p_j} + \dots + ORI_{p_{in}} * \bar{r}p_{i_n-p_j} + ORI_{p_{j1}} * \bar{r}p_{j_1-p_i} + \dots + ORI_{p_{jn}} * \bar{r}p_{j_n-p_i}}{\sum \bar{r}p_{i_n-p_j} + \sum \bar{r}p_{j_n-p_i}}$$

where: $\overline{OC}p_{i-p_j}$ is the objective cohesion of pillar i and j

¹⁸ Job seekers registered for more than 180 days – Registered job seekers: 0,98; Touristic tax after residence – own current incomes – local taxes: 0,93; Total number of places in commercial accommodations – own current incomes – local taxes: 0,91; Utilised solid waste of settlement – Territory of protected natural areas: 0,91

calculation used for objective cohesion. With the help of average correlations and the previously calculated subjective regional sub-indices the subjective cohesion (SC) of two pillars can be described.¹⁹ In the case of Veresegyház small region in the correlation matrix calculated from subjective regional sub-indices there were no |r| value stronger than 0,9 in any sub-index relation, however, there were seven such relationships with the |r| value of 0.²⁰ In such cases we did not determined the average correlation with geometric, but with arithmetic mean.

Adjusted cohesion

The adjusted cohesion can be defined from the joint interpretation of objective and subjective cohesion. The objective cohesion highlighted the strength of two pillars' relation on the basis of statistical data, the subjective cohesion reveals the relationships between pillars created from the respondents' point of view. For the relationship of two pillars the adjusted cohesion can be determined by the geometric mean of the objective and subjective cohesion.²¹ The correlation matrix studies point out that how differently the assessments of the primary and the secondary content of the indicators are. This is why we consider it necessary to perform the two analyses simultaneously, as well as their joint interpretation.

¹⁹

$$\overline{SC}_{p_i-p_j} = \frac{SRI_{p_{i1}} * \bar{r}_{p_{i1}-p_j} + \dots + SRI_{p_{in}} * \bar{r}_{p_{in}-p_j} + SRI_{p_{j1}} * \bar{r}_{p_{j1}-p_i} + \dots + SRI_{p_{jn}} * \bar{r}_{p_{jn}-p_i}}{\sum \bar{r}_{p_{in}-p_j} + \sum \bar{r}_{p_{jn}-p_i}}$$

where: $\overline{SC}_{p_i-p_j}$ is the subjective cohesion of pillar i and j

²⁰ Registered job seekers – internet subscriptions; Registered business entities – own current incomes; Job seekers registered more than 180 days – own current incomes; Family assistance services – own current incomes; Total expenditure for regular social aid – own current incomes; Number of houses involved in regular waste collecting – own current incomes; Number of post offices – own current incomes.

$$^{21} \overline{AC}_{p_i-p_j} = \sqrt[2]{\overline{OC}_{p_i-p_j} * \overline{SC}_{p_i-p_j}}$$

where: $\overline{AC}_{p_i-p_j}$ is the adjusted cohesion of pillars i and j

$\overline{OC}_{p_i-p_j}$ is the objective cohesion of pillars i and j

$\overline{SC}_{p_i-p_j}$ is the subjective cohesion of pillars i and j

Spider web entropy analysis

The mathematical fundamentals of the spider web entropy analysis is given by the objective, the subjective and the adjusted cohesion. In the entropy analysis the conclusions are drawn from the cohesion results. Three states are distinguished: spider web with low, medium and high entropy.²²

Each pillar has four points of contact to the other pillar. We do not analyze the pillars' relation with themselves, so it always assumes a fix value in this model. A total of twenty connections are displayed in the figure, which correspond to ten real relations, as if the relationship between two pillars appears twice, which contain the same information. The model shows the relationships inversely proportional. If the correlation is getting close to 0, the tear in the net becomes visible.

Spider web entropy analysis in the small region of Veresegyház

Based on the objective cohesion all the pillar-relations of the Veresegyház small region have high entropy. The biggest tear on the web is in the relationship (21%) between the tourism/extern relations and the social activity pillars. Although the relation of the infrastructure and the social activity pillars, and relationship between the environment and the local economy pillars shows complete rupture (47%), yet these relationships can be considered as the strongest ones in the spider web of the small region, based on the objective cohesion. For the spider web as whole high entropy is characteristic, which means that there are complete ruptures in the spider web, the relationships between the pillars are not clear and not detectable. The small region has the potential for sustainability, but in its current condition it can not provide by itself.

On the base of subjective cohesion the spider web of the small region has a more balanced structure. Only the relationship of local economy and social activity (45%) of the ten pillar-relations has a high entropy. Medium

²² if, $\overline{AC}p_{i-p_j} \vee \overline{OC}p_{i-p_j} \vee \overline{SC}p_{i-p_j} = 1$,
then the relation of the two pillars has **low entropy**
 $1 > \overline{AC}p_{i-p_j} \vee \overline{OC}p_{i-p_j} \vee \overline{SC}p_{i-p_j} \geq 0,5$,
the relation of the two pillars has **medium entropy**
 $0,5 > \overline{AC}p_{i-p_j} \vee \overline{OC}p_{i-p_j} \vee \overline{SC}p_{i-p_j} = 0$,
the relations of the two pillars has **high entropy**
where: $\overline{OC}p_{i-p_j}$ is the corrected cohesion of pillars i and j
 $\overline{OC}p_{i-p_j}$ is the objective cohesion of pillars i and j
 $\overline{SC}p_{i-p_j}$ is the subjective cohesion of pillars i and j.

entropy is characteristic for the spider web as a whole, which means that there are partial tears on the cobweb, the relationships between the pillars are not always clear and sometimes not visible. The small region has a potential for sustainability, but not in its current state. The two types of entropy analysis show significantly different results, so we consider the determination of adjusted cohesion inevitable, which interprets the two analyses together. In our view, the state closest to reality can be obtained from these values.

Based on the adjusted cohesion the spider web of the small region displays a substantially different image, than the two previous entropy analysis. There are two of the ten pillar relations with medium level of entropy, the rest of the relations have high entropy. The strongest relationship is perceptible between the local economy and infrastructure pillars (52%). The relation of infrastructure and social activity shows a partial rupture as well.

The spider web of the Veresgyház small region shows an unstructured overall image, which is unable to transform the already existing resources properly. Our previous researches prove that the problem of an area is not the lack of proper inputs, but rather that the transformation ability of the region does not allow the transformation of the inputs. The transformation ability of an area and spider web entropy of the area are inversely proportional to each other. The lower the web entropy is within a region, the higher the transformation capability is.

The examination of the relationships between pillars is necessary to be able to determine that at which points the developments are worth starting in the region. The strategic objectives can be formulated along two principles. First, such development concepts must be defined in the small region, which aims to rectify the ruptured pillar relations. According to these, in the Veresgyház small region the greatest emphasis should be put on the relation of tourism/extern relations and social activity pillars, and the relationship between tourism/extern relations and environment pillars when formulating the development ideas. As a second step using the spider web entropy we can find that pillar relationship, which can be a chance to break out for the small region. In the case of Veresgyház small region it is the relation of infrastructure and local economy pillar. Based on the situation analysis a preliminary strategic set of objectives can be prepared for the small region of Veresgyház, which can provide some directions for the local actors in the formulation.

Summary

The limitations of spider web entropy analysis

- it does not define specific intervention, but strategic directions
- due to the difficulties of the basic data's availability the subtlety of the system can be distorted, and the web entropy analysis is not able to eliminate these distortions
- not in every case the most appropriate basic data can be found for the characteristic intended to examine, the lack of interest of local actors (e.g. passivity, improper contact list) impairs the credibility of the final results
- the system is only partially able to highlight the unique local skills; the studies build on external capabilities that are constantly changing, so the cyclic monitoring is inevitable

The advantages of spider web entropy analysis

- the new methodology helps to determine the directions of development, with active and in-depth systematic analysis in the life of a small region in a relatively short period of time
- it identifies such roots of problems, which are determined only partially or with considerable effort by this type of researches
- we can measure the interactions of the effects of particular interventions
- it provides an applicable guideline for the regional researchers to carry out a research
- the multi-level and multilateral examination of the problems helps the formulating of real development strategies
- it is may be possible to establish a nationwide sub-regional monitoring system, which facilitates the dynamic investigation of research results
- by involving the local actors it can promote the support of elaborating exact sub-regional and regional programs

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HENRIETTA NAGY

LOCAL ECONOMIC DEVELOPMENT WITH SPECIAL FOCUS ON LOCAL CURRENCIES

Introduction

Spatial development measures – from the regional resources point of view – can be planned in two different ways. Either the *missing resources are provided from external sources*, i.e. investors are attracted to the region, or *local investments are supported* by huge amount of money. In the latter case, we intend to *discover the own resources* and utilize them as efficiently as we can or enable the local people to do that. It is obvious that local businesses can be the perfect ones to meet the needs of the local population. The two abovementioned approaches may be combined in the spatial development. Moreover, the most efficient solution in practice is the optimal combination of the two.

Demand-, and supply-oriented strategies

In the spatial development strategy of Hungary, the *dependence on external resources* is the most common, which might not be the most suitable solution for the regional imbalances. Such strategies are called *supply-oriented development strategies*. By now, it is proven that lasting and sustainable results cannot be achieved with solely external resources because decisions on external resources and economic factors are mostly made without involving the local community, thus the interest of the local community might not be considered and such decisions may destroy the commitments of local population to the local aims. In many cases, the involvement of external financial sources results in fast and short-term boom and almost immediate decline, afterwards. Furthermore, the external resources usually target the more-developed regions, since the economically and socially handicapped regions do not have the sufficient infrastructure (physical, human etc.) to receive the operational capital. Therefore, external resources themselves are not the expected solutions to prevent the break-off of such regions.

Considering the abovementioned, *internal (local) resources* are becoming more and more important, however, their *exploitation is sometimes overshadowed*. According to the demand-oriented strategy, the local strengths have to be in the focus and they need to be improved further. However, in the bottom-up approach it is sometimes difficult for the local population to list up the local strengths and potentials on which the developments can be built on. In many cases, the local population cannot even see the hidden values and potentials, so the expertise of

external professionals is necessary to achieve success. We often forget the fact that if the goods are kept within the region and are given to local players, eventually they serve the best for the whole community. Internal resources may include human resources (labor force, knowledge, ambition and cohesion), as well as natural and economic resources. Such goods are gaining more and more importance nowadays (in the period of gradual urbanization) like clean environment, no stress, healthy food, environment-friendly energy sources, unused local minerals as well as forgotten traditions. Similar resources are e.g. cooperation, close link between local society and the economic players as well as the exchange of goods. All these can be observed in both urban and rural areas – even if to different extent. *Local economic development* may be an applicable tool in dynamizing economic resources even for such places where general, common economic development tools have not been successful (Czene – Ritz, 2010).

Spatial sustainability, spatial competitiveness

However, it is not only the disadvantaged regions where such methods can be applied. In order to achieve real success, a balance should be reached in using internal and external resources. It is aimed in the basic document of the spatial policy of Hungary, so called National Spatial Development Concept (NSDC) as well, which introduced the concept and aim of *spatial sustainability* to discover, protect and develop the local resources. Therefore, local development strategy, which focuses on internal resources, is favorable not only for the given region but outside of it as well, since it provides stability and development potentials. It also reduces the travel-, transportation- and emission needs that appear out of the region, moderating the environment- and social load.

According to some experts, *spatial sustainability and spatial competitiveness* are contrast, since the first is about strengthening the autonomy of the region and encouraging the circulation of information, energy, money, products and raw materials within the region as long as possible, while the latter one is usually emphasized rather in Western-Europe. However, the abovementioned contrast seems to be virtual, since the right-interpreted spatial competitiveness means that every region should find their own competitiveness factors. Autonomous local economy – based on internal resources – may play key role in such processes and may be an important competitiveness factor. Local economy in general is located in a settlement or a micro-region, which uses its own resources in a sustainable way, coordinates its activities according to its resources. However, local products and services may be sold on external markets, but the primary aim is to meet the *local* (internal) *demand*. In such cases, external market represents the location of the sales of internal surplus (Czene – Ritz, 2010).

Local economic development concept

The local economic development is a complex process and has various tools, so it is not surprising that there is no generally acknowledged concept or definition either in Europe or in the world. „Local economic development is a conscious interference by the local community into the economic processes to achieve sustainable local development” (Lengyel, 2010). Thus, local economic development is more than just the local allocation and distribution of central/state economic development funds.

It requires new methods and should define new focuses. One of the basic principles of local economic development is to know the various endowments, conditions and resources as well as economic and social structures of regions. In addition, the integration of economic, social, cultural and nature conservation activities plays much more important and more direct role. The expression “*local*” reflects the territorial unit of the measures taken. A primary objective for local economic development is to expand employment of local people on a permanent, long-term basis by helping them to create their own small businesses and by creating local markets for locally produced goods and services.

As a supplement or even a contrast of globalization, localization i.e. the evaluation of local conditions and values gets more importance. Due to the intensive involvement of the national economy in the world economy, the effects of globalization directly reach certain regions and settlements which may result in defenselessness in some cases. While focusing on local conditions, we must not forget that each and every settlement and community should survive and act competitively not only isolated local markets but on the global market as well.

It can be observed in rural areas at an increasing extent, while their economic power is being lost resulting in increasing spatial- and rural policy actions. *Defining and implementing the economic development directions adjusted to local endowments and resources* may gain important role in the creation of the economic basis in such areas. *As restructuring the local conditions*, encouraging entrepreneurship, cooperation between businesses, strengthening the consciousness of the population, supporting the direct links between farmers and consumers, as well as strengthening community actions can all be realized. Concrete aim is to allow the *results of economic activities be used locally* either in the form of products, services or jobs or income. It means that local economic development is not simply local, but *economic development with local interest*. It aims to support the local market through encouraging the local businesses and economic activities to meet the *interest of the local community*.

Therefore, its aim is not exclusively of economic feature, but definitely of community and social one, meaning that it aims to *improve the quality of life of local population and to increase profits by all means*. Thus, it can be called as local

community economic development referring both to the methodological and theoretical point of views. In an ideal situation, it is carried out based on *local initiative*, but external expertise cannot be avoided especially at the beginning.

It depends on the fact whether the area has ambitious and committed experts who as “engines” can generate the organization and launching of the process and whether the trust capital is available which is crucial for activating the local community.

Cooperation has a significant role in local economic development. One of its features is that in the framework of local economic development, *local (economic and social) players cooperate* to achieve more active local business activities matching the local conditions and meeting new demands. Joint thinking and actions of the business sphere, municipalities and the local population may enable the community to preserve their own values and potentials based on special local conditions under ever-changing external and internal circumstances. It is also about their improved adjustability. It is always a *proactive adjustability*, which protects and maintains the local values, traditions and resources as well as meets the demand of local population and complies with the requirements of *environmental, social and economic sustainability* (Czene – Ritz, 2010).

Benefits, forms/fields of local economic development

Local economic development has numerous benefits that have spatial development and rural development significance as well:

- generates local business activity;
- has job-preservation and -creation role;
- activate the local community, expands the local cooperation network;
- leads to sustainable use of local resources;
- strengthens local identity and local patriotism;
- improves the population-keeping ability of the settlement as well as its livability;
- renews the urban-rural relations (Czene – Ritz, 2010).

Local economic development can be carried out in several ways and forms. However, most of the actions are related to local products, local businesses but in most cases the initiatives have to be started at changing the way of thinking of the population and encouraging change in their behavior and attitude towards the competitiveness potentials.

Usually it is not money issue whether a successful strategy can be realized or not, but the approach of local population to changes, improvements and new

actions. Therefore, *communication* plays a very important role in local developments.



Figure 1. The tools of local economic development, Czene-Ritz, 2010

In underdeveloped rural areas - facing social and economic difficulties - complex rural development activities need to be carried out which exceeds agricultural production and farming. The aim of the developments is to establish sustainable systems which uses the special local resources efficiently and maintains local value, therefore it promotes the *complex catching-up* of areas lagging behind. So gradual expansion of the functions of such areas and involving new resources (e.g. tourism, alternative income-generating activities) are inevitable. Moreover, in many cases total shift in functions is necessary (e.g. establishing housing and touristic functions). In addition to the new functions, the renewal of traditional agricultural and food industry functions may provide perspectives in such regions (e.g. processing industry on local products).

One of the fundamental principles of economic and social catching-up is that the *rural areas* should be able to keep their population, especially the qualified people. Appropriate life- and working conditions are key factors as well as the infrastructural conditions and advanced *access to public services*.

Major challenges of different rural areas

It is important, however, that developments should be based on local identity, traditions, local values and last but not least on extended cooperation and

partnership. Despite of the fact that there are several *rural areas in Hungary that are lagging behind with similar economic and social indicators, the way how they got to the same underdeveloped situation is not the same*. Therefore, researchers and experts need to focus on researches to find out the reasons for the recession of such rural areas. It is the only solution to find the appropriate development measures and actions. Despite of the common goals and principles, *rural areas are not homogenous* at all. Conditions are *area-specific*, so solutions have to be adjusted to the specifications.

For instance, in **tiny settlements**, the most serious threat is becoming uninhabited, which might cause the disappearance of institutions, businesses and public services; the natural and built landscape is demolished, the traditional land use (animal husbandry, horticulture, vineyards and orchards) loses scope. Problems addressed in such areas e.g. ageing population, unemployment, social and ethnic isolation. Thus the most important tasks of rural development are to improve accessibility, to promote remote-working and distance-education, to provide appropriate healthcare and education services. In addition, to promote traditional small-scale industry and handcrafting, small-scale ecological farming and processing as well as to develop the tourism-related infrastructure and services so that complex touristic packages could be offered.

Farmhouses on the Great Plain of Hungary have lost their functions related to traditional agricultural farming. The buildings are ruined, the infrastructure is underdeveloped and most of them face severe economic and social difficulties (subsistence difficulties, low standard of living, segregation and crime etc.). Their renewal can only be realized through establishing new functions for them (modern farming, holiday and housing functions, catering, tourism), while preserving the values which are represented by them (heritage, conventional farming, close to nature feature etc.).

Regions habited by mainly minorities should build on the common culture and strong community, allowing spatial- and settlement-development which is based on traditions and special endowments. In order to keep the population, the *national and cultural identity and the spatial coherence* have to be strengthened. In addition, the development of social life and the culture related to their mother tongue is inevitable.

The renewal of such areas should be based on minority traditions, individual cultural values in developing the demand for alternative heritage tourism.

In areas with **high share of Roma population**, segregation, the low level of qualification, the high unemployment rate, the health conditions of the population are the most serious problems. In the abovementioned settlements, complex development strategies are needed that deal with the challenges of employment The

self-organization of community, the preservation of culture, the Roma inclusion and the integration of Roma and non-Roma population should be addressed.

Areas with **rich natural landscape and cultural values**, represent increasingly important role due to the increasing demand for healthy living environment, recreation, keeping the traditions as well as demand for handcrafts, artworks with special local characters. In such settlements, the most important task seems to be to protect the values and avoid further damage (caused by industry, agriculture, urbanization, transport as well as intensive tourism sector). Based on the abovementioned, we can see that there are no samples, single schemes which are suitable for addressing the various challenges experienced in the regions. Every time a local development strategy is prepared, the special local conditions need to be discovered and mapped that can serve as a good basis for strategy-making.

Legal background of the development of rural areas

The Act on Regional Development and Regional Planning in Hungary was passed in 1996. The goal of this law was to ensure that Hungarian regional policy is compatible with the EU system of goals and instrument for development. The law itself is quite general, and the details are being ironed out in practice and through implementing regulations.

Hungary's territorial breakdown by statistical micro-regions for regional development, consisting of 174 units, was disclosed in the Annex of Act CVII of 2004 on **multi-purpose micro-regional association of municipalities**, as amended in 2007.



Map 1: Statistic micro-regions in Hungary, National Central Statistical Office, 2014

Based on Act CVII of 2004 the micro-regional territorial breakdown was revised between 1st October 2006 and 30th March 2007, as a result of which 174 statistical micro-regions for regional development were established on the initiative of municipalities and the number of micro-regions is 175 at present.

Regarding the incentives for IMC we can separate **two periods**: the period **before 2010** and the **period after the approval of the new Constitution and the new act on local governments**. In the name of regionalization, an extremely dense organizational network was created both at subnational and micro-regional level. The aim was to enhance cooperation among different sectors and levels. For want of anything better, para-state institutions were made for the tasks of regional development, so-called development councils operated at four levels, i.e. national, regional, county and micro-regional level. One lesson to be learned was that the para-state development councils operating with the dominance of actors of public administration proved to be unsuitable for reaching the integration of the fragmented local and territorial actors. On the other hand, the cooperation willingness and ability was high among the public elite. After 12 years of strong state regional policy it was recognized that the vertical branch of multi-level governance did not work, despite the fact that local governments cooperated in a large number of cooperation organs (Józsa-Nagy, 2014).

The institutional structure of regional development has been often criticized, nevertheless, despite all its malfunctions, it had some positive features for the local governments.

In the system with broad responsibilities, emphasizing the unquestionable primacy of the local level, the cooperation willingness of municipalities striving for sovereignty was rather weak. The spatial development councils operating at different levels inspired their member municipalities for cooperation and the articulation of their interests. The special scale of this interest articulation was the so-called statistical micro-regions (LAU1 level). LAU1 level was the spatial unit of integration as **statistical micro-regions** and the formulation of the **multi-purpose micro-regional associations (MMA)** responsible for the implementation of public services by the municipalities was managed on LAU 1 level too. Both the statistical micro-regions and the multi-purpose micro-regional associations formalized the cooperation of municipalities (in fact they consisted of the same municipalities). After a long time, a positive integration of municipal and spatial development organizations was brought about and the overlapping between the members of the two micro-regional councils remedied the problem of unnecessary organizational parallels (Józsa-Nagy, 2014).

Within a few years, MMAs covered the whole territory of Hungary and within their frameworks municipalities provided the majority of basic health, social, public education, children and family protection, educational and public collection

(library) services. Seemingly it was the ideal state of cooperation among the municipalities: all municipalities were forced to cooperate as they were only eligible for central budgetary supports if they provided services jointly (Pfeil, 2014).

As regards the horizontal cooperation institutions of the local governments, they still follow bureaucratic governance methods and they do not need relationships to either the economic sector or the civil and other non-governmental organizations. In fact, in the organization of the public services the state gave municipalities less and less freedom every year (Pálné Kovács, 2009).

Regarding the mezzo-level, counties had broad competences before the changes in 2012, namely in the field of social, public education, public collection, youth protection, sport and public services with considerable financial sources allocated. It is also worth to mention that in public administration legal regulations only allowed local governments to participate in the associations formalizing the cooperation of municipalities.

The legislator has still not allowed the establishment of associations governed by public law for the cooperation of municipalities and county self-governments. The connection between the county and the municipalities was also missing in the form of the inter-communal associations. Before 2004, in the cooperation of actors at micro-regional and local level, the vertical relations were stronger than the horizontal ones.

Municipalities in Hungary

The Hungarian municipalities are relatively small, and they have a wide responsibility. In Europe there are two types of local government systems: the Northern European type with large local governments, but with wide range of responsibilities, and the South European-type with small local governments with narrow responsibilities. The local government system in Hungary is considered to be very fragmented, which causes a huge cost on the economy. Hungary established a system where local governments are no longer agents of the central governments. Hungarian local governments are not agents of the central politics, but the politics has always tried to intervene into the local issues. The centralist tendencies exist in government based on the view that "local governments have more freedom than is necessary". In the intergovernmental fiscal system, the grant allocation based on discretionary decisions gives room for political interventions (Józsa-Nagy, 2014).

Therefore, we need to see that municipalities, which are the motivators of local economic development in most cases, are not in an easy situation. Due to limited financial resources and several obligatory and optional tasks, especially in tiny settlements, municipalities might not be the most efficient activators of development. However, successful initiatives are usually generated by local famers

and small-scale businesses. One example for such good initiatives might be the introduction of local complementary currency.

Local complementary currencies

Money was created to fulfil two basic functions. On the one hand, it is a measure of value, therefore it aims to be able to express in a universal system the price of goods; on the other hand it is an efficient commerce tool – while in the case of barter we can only do business with partners who possess the goods or services which we need.

But by using money as an intermediate tool, the trade system becomes more flexible, and also, the movement of money and goods can be separated in time. Beside these roles, money can give the opportunity to accumulate and to speculate (VÁTI, 2010).

The creation of local money was primarily motivated by the fact that the global financial system is greatly uncertain, furthermore, that it does not support the local economies. But the operation structure of local money possesses those special characteristics which support the improvement of the local economies. Local money is an alternative currency which is used in a region limited by borders (it may be a settlement, a micro-region or a region), and which helps the spontaneous or artificial development of the local economy. It can usually be found in the form of printed banknotes, but some of them exist in an electronic form. Compared to most of the currencies it is different in some ways; for example, this kind of money is operated voluntarily (it is not obligatory to accept it, and the service providers can join freely to this system). And of course, as its name implies, it stays in local economy and vitalizes it. Its issuers can be self-governments, non-governmental organizations, civilians or a group of enterprises (Tóth, 2011).

Unlike official currencies which typically flows from less-developed to well-developed areas, local money creates that missing tool of commerce which can be spent at the local small-and medium sized enterprises and farmers by its local users, supporting their profitable operation and survival and local jobs. In the same time an opportunity is created for the improvement of the local economy by strengthening the cooperation between local enterprises (Jancsó, 2013).

One of the unique features of the local currency system is that it functions as a demurrage system. Holders of the papers issued within the currency system must face the depreciation of the currency, mainly determined by demurrage (Kennedy – Lietaer, 2004; Lietaer, 1999). The demurrage of currencies usually depends on the given currency. There are local currencies that have no demurrage (such as the Swiss WIR), therefore its holders can buy products or services at the same nominal value at any given time. The demurrage of the given instrument is in most cases determined on an annual basis, but quite frequently on a monthly basis

as well (Lietaer, 1999). Loss in value is an essential characteristic of local complementary currencies, as this serves as the engine of economic blood circulation; demurrage prefers consumption over savings.

Another unique characteristic of the local currency system is that local currency always remains in the local economy; there is no capital export, therefore a significant part of the local economy's wealth remains protected. Goods procured from or exported to another domestic region or abroad cannot be offset with local currency as economic players outside the region do not accept it. Part of produced revenue, therefore, stays in the region, as opposed to being withdrawn through various financial transactions (Kennedy – Lietaer, 2004; Ziegler, 2009). Main features of local complementary currencies are linked to regional economy. The use of the currency outside the region is not possible or is limited according to determined principles.

Complements the national legal tender and is a secondary currency, which enterprises are not obligated to accept. Its use is not automatic and obligatory among local economic players or entities. A local currency is a type of currency that is used instead of other forms of payment, and is also in competition with them (with cash, deposit money, credit card, etc.).

The value of local currencies is fixed by a relevant statute. Usually one unit of a local currency equals a similar unit of the national currency, meaning that the exchange rate of the local currency is 1:1. Exchange rate may be modified in inflationary environments. Subsidiarity is a key basic principle of the system. The local currency system contributes to improving the social environment of people living in the agglomeration or greater catchment area of the settlement or town, and the increase of the social capital – primarily trust – of the community (Tóth, 2011).

Since the middle of 2008 the financial crisis – with all its antecedents and consequences – has undeniably had a great impact on our economy and economic activity. For many of us it is just now becoming clear how complex and opaque the world's financial systems are. Due to the crisis, the role and significance of money is once again a topic of increased interest, as the goal of each and every economic entity is to mitigate the consequences of the recession.

Since the beginning of the 21st century, turbulent globalization processes have necessitated the creation of well-thought out and diversified regional strategies. In such an environment, an appropriate strategy could be reliance on a local currency system, which might significantly contribute to minimizing unfavorable effects. The question arises whether Hungary can be pulled out of the trap of the financial crisis by applying the local currency method.

Increasingly often we hear about the budding initiative of the Sopron Kékfrank. Local economic players have high hopes regarding the project meant as a regional economic stimulator, though there are many who have voiced concerns. In

the current economic situation, each initiative can be considered a forced path, but the introduction of a local currency can also mean the way out of the crisis for certain communities. However, the frequently mentioned economic stimulation actually stands for more than just the above; it is about the organization of the subsistence market and the possibility of becoming self-sustaining.

Observing the operation of local money in practice, it can be said that since it does not have positive interest, it is not worthwhile to accumulate. Therefore its turning rate is faster than of the official currency, which helps the revitalization of the local economy. Nonetheless, there are some difficulties related to local money as well. The primary problem is that even in the case of the most successful international models only a few people know about those currencies. It is indeed a problem to be taken into consideration, because this tool of economic development can only be successful if it is accepted at as many places as possible, and the variety of services and goods provided by the enterprises is as wide as possible, so the needs of the consumers can be satisfied. One of the main reasons behind people not knowing about this currency is the lack of trust. This obstacle is further strengthened by its difficult way of use (Tóth, 2011).

The first civilian users of the local money use it deliberately. These are the people who are willing to put other criteria before the price of the goods and services. It makes a lot of sense, because the locally produced good quality products may cost more – even considering their benefits – than the goods available in supermarkets, but in time, after the forming of a usual and permanent circle of consumers, prices can consolidate. Thus, on the long run it will become worthwhile for the consumers, even considering their prices. The source of awareness usually lies in environment-awareness or provincialism (Jancsó, 2013). Providing employee benefits and cafeteria in the form of local currencies would give the best opportunity for the expansion of this economic development method.

Hungarian examples for local complementary currencies

Kékfrank

The city of Sopron (Hungary) and its surrounding area has decided to boost its economy with the help of “Kékfrank”, a local currency.



Figure 2. Kékfrank from Sopron, <http://www.kekfrank.hu/>

The HA-MI-ÖSSZEFOGUNK (IF-WE-UNITE) European cooperative society from Sopron was the first cooperative society that set out to stimulate the region as well as the region across the border through a local voucher system in 2009. This means that economic players have joined the initiative from across the Austrian border as well. The HA-MI cooperative society aims to help enterprises from the Sopron region by introducing a local currency, and therefore have created a fully secured medium of exchange that strengthens trust. According to the concept, the liquidity of enterprises and the satisfaction of needs and demands could all improve, capacities could be utilized at a higher level, and as a result more services and products can be exchanged (HA-MI, 2009a)

The organization was established with a 100 members, who needed to buy a share for 100 Euros. The establishers and joining participants pledge to accept and use the voucher in their enterprises. In Hungary you need to have the 100% of the released currency backed up by official currency. The organization invested the counter value of the “Kékfrank”. The “Kékfrank” works in the traditional paper form and electronically as well. If the new currency could exchange just 15-20% of the official currency, it would mean billions of forints worth of boost for Sopron’s economy.

From a legal standpoint, the Kékfrank is issued by the HA-MI cooperative, and members can purchase the vouchers in the savings cooperative designated by the issuing cooperative, which holds and pays interest on the Hungarian forint counter value of the Kékfrank amount. Interest revenues are divided among the cooperative and the members. The Kékfrank shall be launched both as a paper-based and an electronic currency.

As the Kékfrank itself does not bear interest, it is in no one’s interest to accumulate it, and as a result it can circulate faster than national currency and could boost the local economy if users conduct exchanges among each other using the Kékfrank. If residents around the Sopron region can conduct their purchases with the Kékfrank, they will increase the turnover of enterprises in the region that are also cooperative society members, as they are also acceptors of the complementary currency (HA-MI, 2009a). As another option, the currency can also be used to provide bonuses to personnel and employees. In this case, the private person does not have to be a cooperative society member, as the person in question is a user, and not an acceptor of the complementary currency. All supporters share in the moral success of the cooperative society, however, only members, members of the acceptor system and users of the Kékfrank share in the profits (HA-MI, 2009b). The Kékfrank voucher is therefore a complementary currency that is used as a medium of exchange in addition to the Hungarian Forint, and that operates in accordance with Hungarian laws (HA-MI, 2009b).

Suskások

It's a swapping club, operating in Hungary, A club, where products and/or services can be exchanged. The foundation of the exchange is TRUST. The members trust in themselves and they trust each other. The purpose of the Suska Club is to use a special currency that circulates amongst its members, thus it raises creativity and encourages cultivating new abilities and talents. They acknowledge one's ability to create value for the community and for the individuals as well. The club stimulates doing activities and creating goods / services that gives pleasure to the individuals and thus to the others. It creates abundance within the local community, however, it enables the members to exchange things with other fellowships as well. It supports the booming of the local production and encourages creating fruitful personal relationships.



Figure 3. The logo of the Suska Club, <http://www.suska.info/?#>

Suska is a tool for exchange. Suska is an inflation- and interest-free currency. It's a swapping instrument: one-hour long work equals 60 suska, but the participants of the exchange may agree on other price as well. The deal on exchange is always based upon the two participants' free will. Using the suska is an excellent tool to enhance your consciousness, to undertake your personal responsibility, and to unfold your creative abilities. Members themselves are the source of the suska. If they need it, they create it, and its backing is their work itself. There is no central accounting and there is no central settlement (<http://www.suska.info/?#>).

The community does not accept any support from external partners because they believe that external money is equal to external intention. The members are motivated by the passion for change and their belief saying that exchange based on trust creates wealth within the community. The aim of the group is to use a currency which stimulates creativity and encourage people to develop new competences. You can become a member if you create valuable products and services. The amount of suska available always depends on the necessary amount for transactions, thus the concept of interest (gaining money without work) loses its meaning. Suska is not a printed "money toy", rather a book where you record your purchases and sales.

Prices are set by the sellers, the customers can decide whether they want the products/services or not. This may provide opportunity for bargaining between members.

Lendítsekk

This is an initiative which is introduced in Gödöllő, in the city of our university (approx.. 25 kms from the capital, Budapest). After successful examples, in my opinion, such example also need to be mentioned where - despite of the good idea regarding local development - the program has not brought the expected results.



Figure 4. The logo of Lendítsekk program, Lendítsekk magazine

LENDÍTSEKK program was launched in Gödöllő, in March 2011. The idea behind was that everyone who joins the program can benefit either as a customer or as a seller/retailer. Customers may get discounts, while retailers, shopkeepers may get new customers and it provides income for the settlement due to the increase in turnover. The program is run in an easy way, since those who buy the book of vouchers, can get 10% discount from the sum if it exceeds 5.000 HUF.

The initiators expected from the program to stimulate the economy of the city and its agglomeration and strengthen the link between the urban population, establishing local patriotism, to expand the potentials of buyers and traders. The owners of the book of vouchers may decide when and where they wish to use the possibility of reduced prices before the expiry date of the coupons. There is no maximum amount of purchase as using the voucher, however, it does not substitute official currency! Vouchers cannot be used while buying products at discount prices or on sale. The constant discount possibility may encourage faster transactions in the economy, more customers in the shops. There are more than 100 shops and businesses where you can use your voucher. Actual list of shops and coupons are regularly released in the Lendítsekk magazine printed in more than 12.500 copies.

It cannot be used for paying, it can only be used to realize the discount prices. You need to pay for the products purchased with cash. However, you can use

it as many times a day as you wish. When using the coupons, the customer has to sign the coupon and give it to the retailer who signs it and stamps it, which proves that it is used in a proper way.

Products which cannot be purchased at discounted prices with the coupons (mainly national and exported products):

- motorway tickets,
- cigarettes, cigars,
- medicine,
- public transport tickets,
- cell phone cards,
- newspapers except if the shopkeeper agrees so.

Unfortunately, the Lendítsekk program has not achieved success in our city. In my opinion, it is because it was not generated by the local farmers and retailers, but an organization. The third party wished to “force” customers and businessmen to use this kind of coupon instead of using simply their money or credit cards. There are several elements in the system which make the purchase more difficult and complicated (which is not a motivating factor). In addition, the marketing and communication of the program was not adequate, since most of the local people, living in the city, did not have any information about this initiative. The communication could have been more visual and definite, more targeted. So this concrete program proves that even if the idea seems to be mutually beneficiary for buyers and sellers in the local economy, it is far not enough. Such ideas need to be integrated in a complex strategy serving the real demand and based on the real local conditions.

Conclusions

One of the most effective means of ensuring long-term competitiveness and decelerating the outflow of local resources is to introduce and use a local currency. This phenomenon is completely new in Hungary and its legal background is inadequately developed, but several European experiences show that with adequate preparedness, and the active participation of the population and economic organizations it can offer a real alternative for local developments.

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MELINDA MOLNÁR

**THE SUCCESS FACTORS OF SETTLEMENTS, PARTICULARLY
THE
MEANS OF LOCAL GOVERNMENTS**

Introduction

It is generally believed that successful settlements can come into being where the citizens are also prosperous and successful; thus where the growth, the improvement of the quality of life appears also in the life of the community and of the individual. In this case the citizens are obviously content; they can create the properly multilateral and complex expression of interest (Bódi-Bóhm, 2000). However, this scenario cannot be considered as a standard. Interpreting the success of settlements as the set of individual successes is a bit simplifying and idealistic. The individual successes do not always provide clear communal values. There is not in every case a long-term sustainable development behind such a success.

Success cannot be reduced to one sole factor. Although in the first place the public opinion interprets the success of the settlements from an economical viewpoint, in fact the success of a settlement is depending on several economical-social factors. The field-research done in Hungarian settlements also prove this. The factors determining success are thus complex. Every factor that influences the local condition of existence and the quality of life has an effect on the development of the settlement, thus also on its success (Ludescher 2010). According to Bartik (1995) and Čapkova (2005) the emphasis is on the positive quality of life besides having a sustainable development. Behind the successful settlements stands a stable economy and community, and active local governments. This is the basic of the successful local economic policy.

The goal of local economic policy

The key objective of local economic policy is the development of economy. However, this seemingly simple objective raises some issues. First of all, is the development of local economy an isolated goal, perhaps an objective in itself or should it be interpreted in a broadened context? There are several approaches in the related literature. Syrett (1995) defines the development of local economy while keenly separating it from the definition of local initiatives. While he uses the local development of economy term for the general, local level development process, he

describes the execution of special activities and the creation of enterprises as local economic initiatives. From this conception it ensues that while the local development of economy can be initiated by an external effect, for instance external investments or the central economic policy of government, the local economic initiatives are initiated always on the local level. Nevertheless, G. Fekete (2005) talks about the deliberate intervention to the process of ongoing changes when speaking about the development of economy. According to Mezei (2006 A), the development is an intervention resulting the improvement of quality, where the ultimate goal is to increase the population's standard of living. In fact, the ultimate goal of development is not only to increase the standard of living but optionally its maintenance or even the slow-down of deterioration. Bartik (1995) and Čapkova (2005) also put forward the improvement in the quality of life, which they find available through job creation and enterprise development. The development of local economy is thus such an effect to the social and economic environment, where the ultimate goal is to improve or maintain the local quality of life, if possible. In this sense the general success of the settlement can be measured by the success in the development of local economy.

Local governments and the development of local economy

Local governments always have a role in the development of local economy, which is different in each country. They are thus typical participants of the initiatives concerning the development of local economy (Bennett–Krebs, 1991; Norton, 1994; Bartik, 1995; Horváth–Péteri, 2001). Bennett and Krebs (1991) nevertheless state that the local governments can perform this task only in co-operation with other public figures (governmental offices, developmental agencies, regional authorities) and non-governmental participants. Others (Felbinger–Robey, 2001; Syrett, 1997, Horváth, 2002) approach the role of local government in the development of local economy through the co-operation of local economy developmental actors. Although it is true that the development of local economy goes beyond the range of the local government, we should now review - based on the survey of Mezei C. done in 2006 - why there is a need of the local government's engagement in the development of local economy. (Mezei, 2006 B)

- The local community also expects from the local governments to help the developmental procedures of the local economy, due to the fact that the development of local economy is a communal interest.
- The local government has the opportunity to create regulations which might motivate local entrepreneurial activity.
- In many cases the local government is the only serious actor regarding the solution of local employment problems, because the enterprises on their own are weak.

- The expansion of the revenues from local taxes is an important objective of local governments.
- Due to the fact that the local governments possess essential information about the settlement, they are in a good position, so their coordinating role is pre-determined.
- The improvement in the quality of life as an ultimate goal is inconceivable without the engagement of local governments.

When we speak about the effect of local governments in local economy, we should begin with the fact that in the European post-communist countries the municipal system was established after some 40 years of a one-party state, centralized authority. This implied that due to the fact that the one-party state system intended the local authorities to have only an executive role, the essence of self-government had to be learned again in the past 20 years. However, it is probably not accidental that in Hungary the local authorities credit outstanding importance to the current priority of governmental aid policy.

Thus the pressure of compliance to the central government exists even today. (Péteri 1996, Mezei 2006A) Nevertheless, it can be stated without doubt, that after the change of regime, from the beginning of the 90's the local governments undertake an initiative role in the development of local economy (Péteri, 1996), though the opportunities change from time to time. The fact that the local government roles and means change from time to time implies that the effect of the local governments in the local economy also changes.

When we try to embrace the effect of local governments in the local economy, it is important to know that due to the fact that the tasks obligation of each local government might be diverse (dependent on the size of the settlement, population and other conditions), the possible tasks of the local government, and along with this the means of the local governments cannot be identical. Neither on the level of obligatory and optional categories. There are functions which can be undertaken voluntarily with respect to each municipality, but might not be obligatory at other municipalities. Another important fact is that local governments do not merely concentrate on the obligatory duties because they are responsible for the development of the whole settlement (Péteri, 1994). Moreover, the success of a local government is in many cases not judged by the obligatory municipal duties, but based on the not compulsory (but necessary) duties, like the development of local economy (Mezei 2006 A) Nevertheless, it is also true that the work of the local governments cannot come down merely to the representation of economic rationality. Nonetheless, it cannot go without it. It is not obvious even today, how much space local governments need regarding the development of local economy. There are some extreme approaches which question even that whether there is sense in talking about the development of local economy, or the development of local

economy should be rather interpreted as part of regional processes. Faragó (2004) sees the intervention opportunities so limited that he views the local governments' acting in the local economy reasonable only in case of an inefficient market. According to Péteri (1994) the effect of local governments' to the local economic processes is limited, but still, his opinion is that the intervention must be attempted. He believes that the following intervention opportunities are at the disposal of local governments: establishing premises for the enterprises, providing tax incentives; giving advice (for instance to the start-ups); obtaining credit; granting guarantee; capital insurance with private investment; training; information service; introducing effective service-organization methods (Péteri, 1994). After the change of regime an obviously positive shift can be seen in Hungary on the level of settlement self-government, thus the local government can enter the development of local economy with newer and newer intervention fields, however, it can be also said that generally the financial and legal background means a narrow cross-section. Furthermore, the bigger and smaller settlements do not have the same opportunities.

The adaptability of the local governments; do the local governments have the adequate means for a real effect in the development of local economy?

As we mentioned earlier, the objective of the local economy is quite diverse. The objective is to maintain and improve the local quality of life, to which the following acts are essential: preserving the values and traditions of the settlement; maintaining a high level of the settlement's services, and expanding them if possible. Among the constantly changing conditions those settlements can be really successful, which are able to adapt to their surroundings. To develop adaptability the local governments have to know well the environmental factors they are subjected to. It is worth viewing the real factors systematically. In this process the PESTEL-analysis²³ method known from economy assists. This analysis gives a full overview about the environmental factors, although its use in the municipal sector is slightly different from the for-profit sector. It is worth defining the advantages and disadvantages of the settlement during the analysis, whilst we mark the special local problems, and estimate the region's development potential.

If we had managed to create an inventory of the real factors, then during the next step it is necessary to review the diversified roles of the local governments, and the means which belong to them. When we speak about the role and means of the local governments, we should not forget that these can strengthen or even weaken each other's effects. They exist also separately but in practice they cannot be separated for the most part, and they function in interaction with each other.

²³ From the initials of the following words: **P**olitical, **E**conomical, **S**ocial, **T**echnological, **E**conomical, **L**egal

According to our experience seven roles can be identified at the municipalities. These are the following: political, owner, norm setter, official, market, employing communicator roles. (Lendvay-Nagyné Molnár 2013)

Different means with different levels of range belong to the different roles, respectively. However, it is important to note here that in order to apply the different means for the different roles there should belong such, in many cases distinct attitudes, which cannot be implemented always by the same actor, thus by the local government. In many cases an anomaly can be caused by the fact that the local government is norm setter while being an owner at the same time. In the following we review the certain functions and the means available.

The primary role of the local government is the political role. The priority of this role arises from the fact that in the democratic system this is the basis of the local government's functioning. Its essence is that the voters bestow the power needed to direct local issues. This role is exercised by the local government principally when creating the strategies, which shape the life of the settlement (settlement developing and asset management strategy, public education action plan, etc.). But it is this role from which local governments proceed when they work on creating arrangements with other settlements (twinning association agreement, founding EGTC²⁴). This role is a strong role, regardless of the size of the settlement, because the proper planning and strategy development, creating partnerships is inevitable in the life of local governments. The lobby-role can also be regarded as a political role, which is an important part in the involvement of capital needed for the development of economy. The communication with the local communities is also a political role. A good example of this is when the local social capital joins their forces, and an initiative, for instance, a city (village) beautifying initiative is started. Usually, this influences significantly the local political environment, enlivens the public life and the economic participants. Such initiative was the local cooperation in the case of Tihany, where the result was that in 2014 the village won the European Village Renewal Award.

The second role of local governments is the owner role. However, this relates closely with the political role of local governments. The management of public affairs could not be imagined without the management of the community's wealth. Local governments use this role when they manage the movable and immovable property owned by the local government, and when they handle corporate shares.

The third role, the norm setter function can also be derived from the public authority function. Namely because local governments' have a legislation option. In

²⁴ EGTC: European Grouping for Territorial Cooperation, the cross-border organization of settlements

some cases it is specifically their duty. The statutes about local taxes are made using this right. Perhaps one of the most significant elements of the local economy's development is tax politics, due to the fact that local authorities have relatively big freedom in the field of tax levy and tax rate, as well as in the use of tax incentives. Moreover, the size of local tax revenue limits highly the local governments' room of manoeuvre, because the freely disposable resources are pretty limited, and the state aids do not guarantee completely the cover of maintenance costs. The consequence of this is that the developmental opportunities of the local governments and the future of their own revenues relate closely. It is especially important in the case of voluntarily taken tasks, like the development of local economy, where only the "remaining amount" gets to finance this field. By combining the several leviable taxes and by shaping certain incentives the local authority can influence the tax burden of local enterprises. The implementation of the building rules is also a norm setter function. A good example for the norm setter function's local economy stimulator solution is the taxation of non-agricultural, unbuilt building sites with an objective of settlement development. This is a method which is used in many settlements in the Budapest agglomeration. Its main point is that the investment property ownership is made thus more costly, thus stimulating actual economic utilization. As a result, those enterprises can settle which pay local taxes (business tax, land tax, municipal tax), and workplaces, which provide income, can come into being. It can be easily reasoned that the norm setter role is a specifically effective means from the part of the local government to stimulate the local economy, because they affect the development of local economy directly and indirectly. It has to be noted, however, that for instance under the circumstances of the economic crisis the norm setter role can have sometimes unwanted consequences. The reason for this is that, for instance, very often the not sufficiently well-capitalised owners (especially the local small-and medium enterprises) cannot fit the laws or regulations adequately, which undermines them, or they suffer at least some competitive disadvantage.

The fourth role of local governments is the official function. To this field belong some price authority (water and sewage, district heating as well as mass catering service fee) issues and more, local monitoring checking functions. The official function, as the developmental means of local economy in Hungary can be illustrated with some rather, more or less legal examples. For example, such was the practice, when the concerned local governments hampered the realization of specific investments until an agreement favourable for the settlement was made. In Hungary this problem was solved by the legal instrument of area development agreements. Today the owner is obliged by the resulting contract to develop at the settlement if needed and to arrange a cash payment in a given case in addition to developing the concerned area. As compensation, the local government agrees to

change the classification of areas in favour of the investor and to issue the necessary permissions. As I see it, these means should be rather used to observe local laws, but the present circumstances go beyond this self-limiting interpretation. The resulting laws generate both obligations and rights, and if they are observed, then a predictable investment environment can be created, which stimulates the investment climate.

The fifth role of local governments is the market role. It is important to highlight that the local government is present in the local economy as provider and customer. It is customer, when it is a procurer, for instance of the supply of local enterprises, but it can be a provider, when it supplies local enterprises and it is a competitor to local enterprises. What concerns the market role of local governments, the Hungarian experience shows that the majority of local authorities seek the opinion of local enterprises before defining the developmental objectives, but the framework of a formalized, day-to-day communication between the two participants have not yet been formed in the majority of settlements (Mezei 2006B). The local economy stimulating effect of the market function of local governments does not need to be explained, but still, the directed management of the local enterprises is quite difficult. The reason for this lies in the limits of the competitiveness of local economy. Some enterprises with national coverage can often give much more favourable offers than local enterprises, due to the competitive advantage originating from economies of scale. Nevertheless, there are some good examples. Such a good example is the food purchase from local producers, which serves especially well the functioning of local mass catering in Hungary, which cannot be regarded useful only from an economic aspect but also from a social viewpoint. In many settlements the local government appears on the market as a competitor. A good example of this in Hungary is Kazincbarcika, which, in addition to having a mass catering based on high capacity kitchens owned by the settlement, runs a restaurant and delivers food. This activity seriously challenges local restaurants. It induces a healthy competition, slightly keeps down prices, and thus its positive social effect is indisputable.

The sixth role of local governments is employing. In the majority of settlements which have weak economic power base this is an especially important role, because in a particular case the local government might be the biggest employer. This means that it is an active participant of the local labour market. In Hungary, the municipalities are by all means determining participants of the labour market. In addition to the traditional municipal forms of employment (public-sector employee, civil servant, anyone subject to the Employment Code) new municipal forms of employment appeared in the recent years in Hungary. The so called public works programme is one of this kind. Within its framework, particularly large

amount of people are given a job and a living. This is important regarding the local society's source of income but it is also advantageous due to the fact that as a result, the condition of public spaces improve in the settlements, several public tasks are assigned, and if not en masse but a number of persons can get back to the labour market.

The seventh role of local governments is the communicating role. This is a quite important task of local governments, though it is also true that only with communication no success can be achieved. A settlement can be successful in the long term only if its own (internal) image, thus the opinion of the people about their own settlement is positive. To achieve this, the local governments have a serious agenda on the level of communication. However, the settlement management needs to know how the locals perceive their own settlement, what do they regard as their strengths, weaknesses, dangers, opportunities. While the local governments have to work up thus a positive internal image, acceptable by locals, the external image also needs to be shaped. This means that the settlements have to create their own image; they need to make themselves attractive and interesting. The local economy stimulating effect of the communicator function is shown by the different settlement-marketing solutions, which show, however, different degrees of success. A positive example in Hungary is Sümeg and the "constable's institution" - though in this case we should be speaking less of a settlement-marketing than rather a touristic attraction marketing. However, positioning Szentendre as the "city of women" was virtually unsuccessful; there was not enough will nor enough money to achieve a decent result. The wider parking spots made specifically for women appeared rather as a marketing gag than as a settlement-shaping force.

The practical experience is that there are no universal means which fit to the particular objectives and local conditions, and guarantee success anyway. Therefore the participants in the development of local economy - actually the local governments as well - try to use every possible means which is at their disposal. The experience in recent municipal success stories is that on the field of economy stimulation the most widely used means is the political and the norm setter. This is not utterly surprising if we take into consideration that this is the widest social, relational and strongest will-expressing means. The employing and the official role means are slightly more focused. What concerns the means of the market and owner role, a close coordination is needed in every case. The use of communication means look particularly focused.

Adapting to the environment

The settlements and the surrounding social, economical sphere are constantly changing. Among the continuously changing conditions those settlements can be truly successful which are able to adapt to their environment.

Adapting to the environment can be interpreted in a political, economical, social, technological, nature-geographical and legal sense. The PESTEL analysis is based on the research concerned with the adaptation to the six factors. With this analysis we can get a good general survey about the acting factors. It helps us also in regional planning, because with its help the wanted development goals can be determined more precisely. However, this analysis does not explain, how one can be truly successful through the viewpoint of the examined acting factors. What kind of means can be used for this?

The settlements as autonomies due to their far-reaching role-system possess means of different characteristics, which can strengthen or even weaken each other's effects. One part of the instruments used by the settlements are unique (e.g. local taxes, local communities, etc.), whereas other instruments (e.g. administrative legal regulation) work alike everywhere. The success of a settlement depends also on finding their effective means and how well they use it.

Factors of success

On the basis of our field experience the following factors can be seen as the factors contributing to the success of the well-working settlements: useful local conditions, innovation seed (initiative force) , genuine management of the settlement, synchronization between the innovation seed and the management of the settlement, acceptability of the plans for future in the mind of the local people, active local community, positive shadow-effect, accessibility of the transportation, positive internal image, positive external image (Molnár M. 2014) (Figure 1.).

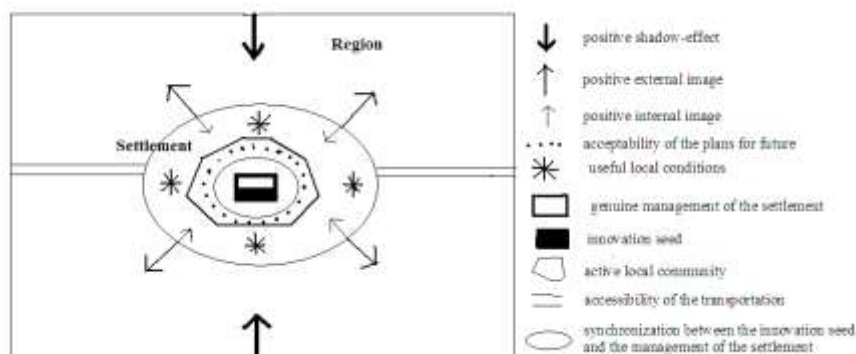


Figure 1. Factors of Success

Source: own editing, Molnár M. 2014. pp. 68.

The **useful local conditions** are such material things, regional circumstances, human resource-elements, which represent unique values in every

settlement. To put it into other words, these sources are the settlement's material, mental and spiritual values. The wealth of the settlement can be counted among the material values, including the national wealth and the private means. Due to its nature the national wealth for the most part is nowadays charged with problem-solving and often with mortgage, thus it is difficult to mobilize it. Regarding the private means it can be said that they can be accessed usually only with the approval of the owner. Nevertheless, both kinds of these properties contain the possibility to create value. The typical method of the economical development of the wealth is converting it into money, the burdening, taking into the collective business (PPP constructions). But changing the development possibilities belongs also here, by this means overestimating wealth (e.g. regrading agricultural territories, or the alteration of the building possibilities). Similarly, the settlement's revenues can be regarded as material values, which secure the funds of everyday functioning, but along the proper scheme sources can be detached for other value-creating goals. The local communities' mental capacity and relations capital can be seen as mental values. Among the settlement's mental treasures are for instance the local architectural values, but the local historical values, which were accumulated by the local population can also be counted here. Thus to prosper locally explicit and also tacit knowledge is essential. The settlement's spiritual values are also counted as significant treasures. The genius loci manifest itself alike in the architectural environment, in the cleanness of the settlement but also in the speech of the people, their relation to each other and to the guests. (Figure 1.)

However, the useful local conditions in themselves make no settlement successful. For this result it is necessary to have such an active initiative force, **innovation seed**, which undertakes to implement the local values in the service of the settlement. It is a lucky situation, when there is **synchronization between the innovation seed and the genuine management of the settlement** thus they cover each other. This means that shaping the directions of future-serving changes, innovations and the acceptability of the plans for future in the mind of the local people meet in the work of the local management of the settlement thus strengthening each other. It is less lucky and leads often to failure (for instance to by-elections) when the innovation seed and the local management do not support each other. Similarly, crisis can be caused when the social acceptance of the managed innovations is locally modest, namely it **has no adequate approval in the local society**. (Figure 1.)

It is a very important, successful determining value of a settlement, to have a "seed" which unites and moves the community and if people representing various interests, values can connect to this. An **active local community seed** is thus needed. The community's internal structure, dynamics is a value, which can turn

into a strategic resource when helping in mobilizing the local economical, social resources. In the active local communities, however, it is often a problem that only a narrow company is active in truth. This can be a problem due to the fact that in such a society the beneficial effect of the building of society by the active seed is not felt in the wider community. In itself the activity of a narrow community seed cannot result in a lasting success if behind it there is no adequate support from the part of the local community. The communal activity serves properly the success of the settlement only where the whole of the local community or at least the majority of it is supportive. (Figure 1.)

The so-called “**shadow-effect**”, when evaluating it as the factor determining success we start from the examination of a larger region determining the settlement’s success. Our starting-point is that a settlement can be successful if that region, where it exists, is strengthening its efforts, secures support, and it has partners in geographical proximity to exploit the opportunities (Piskóti 2012). Nevertheless, the shadow-effect works not only in a positive sense but also in a negative one. We can experience this when the settlement possesses extraordinary potential but the medium, with which they are in geographical connection, holds it back, does not let it develop. (Figure 1.)

Usually the **accessibility of transportation** is also an important factor of success. It is a fundamental advantage if the economical centres are easily and quickly accessible (with public transport and/or individual transport). The accessibility of the economical centres is a key issue not only for the role of employment in the centre but because the economical centre also secures the educational, cultural, health, etc. provision belonging to the higher quality of life. (Figure 1.)

A settlement can be successful for the long term only if it has an own **internal image**, namely if the people living in the given region have a positive image from their own settlement. Nevertheless, a positive image can be built from a miscellaneous and controversial image. This needs adequate community building, well-defined goals; such ones as everyone can undertake, with which everyone can identify themselves. The head of the settlement has to be fully aware of the fact how the locals see their own settlement, what they regard as their strength, their weaknesses, dangers, opportunities. (Figure 1.)

The **external image** is also significant from the viewpoint of the settlement’s success. It is important that the settlement should be generally known, preferably with a positive content. It cannot be expected from every settlement to have a popularity identical with a touristically much frequented settlement. Nevertheless, it is important that every settlement should build its external image according to their conditions/opportunities, and to communicate it properly to the appropriate group. The external image of the settlements takes form thus partly with

conscious communicational activity, partly with the not necessarily controlled common talk. When shaping the external image with conscious communication the aim is to create the settlement's own image, and to learn how to display itself, make it attractive and arouse interest in others. (Figure 1.)

Case-study

On the basis of our field experience the following factors can be seen as the factors contributing to the success of the well-working settlements: useful local conditions, innovation seed (initiative force), genuine management of the settlement, synchronization between the innovation seed and the management of the settlement, acceptability of the plans for future in the mind of the local people, active local community, positive shadow-effect, accessibility of transport, positive internal image, positive external image

Now comes the analysis of a specific Hungarian location, based on the aspects above mentioned. The basis of the analysis is a village seminar research done in 2011 at the Economics and Social Science Faculty of the Szent István University at Gödöllő. This analysis included a comprehensive collection of statistical and field information in the small village of Baks, in the county of Csongrád. The village is located 35 kms north from the biggest city of the Southern Great Plains, Szeged. The population of the village in 2010 was 2095.

During the analysis we assessed the situation of the labour market, highlighting the importance of agriculture, transport accessibility and trade supply, the functioning of the non-governmental organisations and those public institutions which are the most important for the residents of the village, but also the opportunities in tourism and a mental map was also created. Besides the statistical data the result is based on the information given by almost two dozens of interviewee and by 155 households which were given a questionnaire.

Accessibility of transport

Despite the fact that the village has no transit traffic, and thus having a no-through-road characteristic, the village is not unfavourable from the aspect of accessibility. The main reason for this is that the Kistelek slip road for the M5 motorway can be found 16 kms away from the settlement which secures good accessibility both in the direction of Szeged and of Budapest. Its public transport rests on buses, because the train bypasses. Regarding this fact, there is only one settlement part which can be considered problematic: namely Máriatelep, which is separated even physically from the core of the village (it is approximately 2 kms away from the village core). The source of the problem is that not every bus goes into Máriatelep, which means that those who want to travel have to walk in to the centre (Murinkó 2011).

Positive shadow effect

Baks belongs to the subregion of Kistelek, which has one of the highest tendering activity in the Southern Great Plains region. The wider surroundings of the settlement are recipient for every initiative which has a chance of tender.

Useful local conditions

The village is traditionally an agricultural village. The basis of living was granted by an agriculture built on a well-functioning horticulture. However, after the change of regime this sector could not be renewed due to the facts that the market narrowed down, the farmers have no pool and the young people do not tend to continue the legacy, these risky agricultural ventures (Mihály 2011).

The other living of the village could be tourism. Baks is located next to Ópusztaszer which is a key tourist site in Hungary. According to the tradition, it is the spot where the alliance of the settling Hungarian tribes was concluded. Today it is an important historical place of pilgrimage for Hungarians. Currently, the village gains almost nothing from this opportunity, although it has some catering establishments, inns which rests on this. Regarding tourism, additional useful conditions could be the sights of the surrounding Pusztaszer Natural Park, or the fishing lake waiting for development or the planned House of Folk Antiques (Topa 2011).

Genuine management of the settlement

Based on our field experience it is clear that the genuine management of the settlement is not secured. The mayor became the leader of the settlement with the support of a political party in 2010. At that time an independent nominee had a close duel (differing in just a few votes) in the settlement. After recounting the votes the current mayor was legalized, however, the tension could be experienced also at the time of our research in 2011. The settlements was at the time ungovernable, due to the fact that the majority of the village council was not a supporter of the mayor, thus the council work was not progressing. In the end, at the beginning of 2012, the village council disbanded itself, and called a new election. In the course of the elections the current mayor won again (again with some minor difference in votes), but now with a more adaptive village council.

Innovation seed (initiative force)

There are several innovation seeds in the village. One of them can be linked to the supporters of the current mayor. The other group is independent. One leader of the latter group was the main challenger of the mayor in the elections of 2010 and during the off-year elections in 2012. This group controls the social, non-governmental organizations of the settlement (Kozma 2011).

Synchronization between the innovation seed and the management of the settlement

Based on our experience there is no synchronization between the innovation seeds and the management of the settlement. The management of the settlement has its own concept about what is good for the village. It does not cooperate at all with those who think that another step would be beneficial. The mayor himself worded that “first of all, he has to serve his own voters” (and not the whole of the village).

Acceptability of the plans for future in the mind of the local people

Due to the fact that the plans are not created resting on a wide social basis but by a narrow team created by the mayor, the social acceptability of the decisions is meagre. A good example for this is the establishment of the so called Settlement-house. The main aim of the Settlement-programmes originating from England is that these houses should function as a community centre where the badly or not socialized minority is taught to self-care, to motivate it, and to facilitate the social integration of the target group. To achieve these goals different activities, camps and courses (for instance cooking classes) are organized, which are adjusted to the age group, and secures access to services, which are nowadays indispensable (e.g. internet access, library use). Using the European Union tender funds which were won by the settlements of Kistelek subregion, the Settlement-house was built in Baks, in the section of Máriatelep in 2011. During the realization of the tender, the decisive fact of choosing the location was that within this subregion only here can be found a bigger, spatially concentrated gypsy community. (Approximately 15% of the population in the village is gypsy.) The institute was established by transforming a former house, wherein the following units were created: a not too large community hall, a kitchen, an office, a tiny room with a computer and a plumbing. The community house functions on the practical basis of Settlement-houses, thus first and foremost with the aim to integrate and build the community of the gypsy minority. However, the acceptance of this definitely good idea has some difficulties. The judgement of the institute, which was opened during our research in 2011, was quite controversial by the target group (gypsy community) but also by the village as a whole. One part of the gypsy parents and grandparents with small children living in Máriatelep disapproved that the house is small, and moreover it is located next to a busy road; it is a building with no courtyard or large space. It cannot serve community purposes. Their opinion is that a community-friendly environment, playground, park should have been established around the house. The opinion of the majority in the village was also miscellaneous: 26% of respondents deemed it good, whereas 21% did not deem it good that the house was established. Approximately one quarter (27%) of the respondents did not have an opinion on this matter, but they said that they were worried about the multifunctional community house located in the village centre; what is going to happen with it. Their fears were proved to be

true: the community centre serving the whole village had to be closed down in January 2012, and the Settlement house was also closed down in 2013 (Kozma 2011).

Active local community

The community organization is quite layered in Baks, although not everyone in the village has the same share in it. For this reason it is important to determine what types of organizations there are, just as what activity the locals have in this. Comparing the number of non-governmental organizations to the low population of the settlements, it can be said that there are lots of NGO-s; Baks had 10 different NGO-s functioning in 2011. These cover the residential demands, because they were born as an answer to the arising needs, based on the interests of the local people. The range of self-organized groups is vivid: there were created traditionalist, sport, cultural, social and neighbourhood-watch associations. What concerns activity, according to our questionnaire, 115 from the 155 households stated that they are not members of any civilian group. 28 belonged to one organization. There were 10 people who belonged to two organizations, and there was one person, who was the member of three, and another person, who was the member of 4 groups. This notion is tinged by the fact that 51 respondents could not name any non-governmental organization. In addition to having an excessively layered community-organization the sacred community is also layered. This historically Catholic village admits such small churches as Jehovah's Witnesses, Faith Church and Love of Christ Church (Lankó 2011).

Internal image

The internal image of Baks is not unambiguously positive. It became clear during the mental mapping that for instance the local judgement of the three settlement parts of the village, which have their own names (Szőlő, Major, Máriatelep), is not unified. In the course of our research we asked people what they think about their own and about the other two settlement parts. The judgement of Szőlő (which is the village centre) was in every case positive, which means that the people living there and those who live elsewhere deem the local conditions there the best. Major (which is located further off the village centre but still in the village core) was deemed clearly favourable only by those who live there and by the underprivileged people of Máriatelep. Máriatelep which is inhabited 95% by gypsies is seen by the locals and by the other settlement parts unfavourable (Kistamás-Molnár 2011).

The diverse social conditions are shown also by the fact that on the course of our questionnaire very different answers were given to the questions concerning the factors of the same social and economic conditions. Not only was this true between the groups of different social status but also between those who live in different settlement parts (for instance regarding public safety, traffic). The

raggedness of local society is enhanced by the existence of ethnical divergence, of a segregated gypsy area.

External image

The external image of the settlement is not completely devised, however, when comparing with the already “devised” Ópusztaszer, the results obtained per unit of time in the query system of Google is in practice not fewer in the case of Baks (705.000 search results) than in the case of Ópusztaszer (458.000 search results).

On the whole, the example of Baks shows several success components: one might as well say that the accessibility of transport, the shadow effect of the environment and the variety of the useful local conditions in the settlement is favourable. An additional positive condition is that it hasn't got only one but more innovation seeds. It's a pity that they cancel each other's effect. It is also a pity that the leader of the settlement wants to serve only his own voters, and not the whole of the village. This way co-operation cannot exist, which would multiply the opportunities of Baks. It is a likewise positive component that the community is very much alive, although the activity could be improved. Nevertheless, this would need the local society to have a more coherent positive internal image. Currently, the settlement pays more attention to the external image than to the internal image.

Conclusions

Overall, the objective of the local government's economy developing acts is to harness the available resources according to the objectives of the settlement. The economy development objective of local governments is generally to improve the local quality of life which can be achieved via adapting to the environmental factors. In order to do this the settlements have to map these environmental factors. The mapping helps to determine the present situation and the economy development target system. The Hungarian local governments, assigned to their diverse role system, possess means of several different characteristics, which can strengthen or even weaken the effect of each other. If used systematically, the concerned settlement's economic development may be available in accordance with the pre-recorded target system.

The settlements have different opportunities in the field of the development of local economy, which are dependent on many factors, including their size or population. As a result the local governments do not work with the same roles and means. Although there are model strategies, every settlement has to find their own recipe to influence their local economy.

One part of the means used by the settlements is unique (for instance local taxes, local communities, etc.), whereas other means (e.g. administrative law) work everywhere the same. When developing local economy, the available means are

used seldom in themselves; mostly we can see a consciously developed combination of them. The consciously developed or accidental combination of means used have various effects. The success of a settlement depends on whether they find their most effective means and whether they can use them effectively. Regarding the reviewed means, it is important to stress that they can have a significant effect on the functioning of local economy separately, although if affecting each other, the result can be superimposed. Nevertheless, it is also true that the uninspired or inconsistent use of means may weaken each other's effect or even completely cancel them.

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ROLE OF THE SOCIAL ECONOMY IN LOCAL ECONOMIC DEVELOPMENT - A THEORETICAL OVERVIEW

Introduction

The significance and actuality of local economic development (LED) cannot be questioned regarding the development of the Central-Eastern European regions (see e.g. Nagy and Káposzta, 2006). The development of micro-regions in Hungary are carried out along the priorities represented by associations of local governments, organizations set up by local players of several settlements to achieve common development and the economic action groups of rural development. The essence of all the efforts is that the aims to be achieved and the related strategy are defined by local people. The territories require various development strategies due to their special conditions. It is also important which programs can be implemented with the contribution of the local population (G. Fekete, 2000).

The social economy has received increasing policy attention in recent decades, particularly with regard to its contribution to employment. Much has been written about the potential role of the social economy as a solution to unemployment (see e.g. Westlund, 2003). A number of statements from the European Union (EU) indicate as well that the social economy is given increased attention as a means to create new employment. It has been estimated that social economy organisations (SEOs) together account for 6-6.5% of aggregate employment in the European Union (Monzon and Chavez, 2012; OECD, 2013).

The economic and social significance of social economy enterprises is widely recognized. Their importance is also growing in the face of new emerging needs. The aim of the Commission's policy towards social economy enterprises is to guarantee to them a level playing field in which they can compete effectively in their markets and on equal terms with other forms of enterprise, without any regulatory discrimination and respecting their particular principles, modus operandi, needs, particular goals, ethos and working style (EC, 2014a)

Based on the above mentioned this paper tries to find the common section between local (economic) development and social economy, giving an overview on literature concerning the topic, analyzing the terms and main features of local-, endogenous-, community based development, the importance and characteristics of social economy, emphasising the possible role of social enterprises, especially social or community based farming in the development of rural areas in Europe.

Local economic development

Local economic development (LED) offers local government, the private and not-for-profit sectors, and local communities the opportunity to work together to improve the local economy. It focuses on enhancing competitiveness, increasing sustainable growth and ensuring that growth is inclusive. It encompasses a range of disciplines including physical planning, economics and marketing. It also incorporates many local government and private sector functions including environmental planning, business development, infrastructure provision, real estate development and finance.

“The aim of LED is to create the economic capacity of an area so that it could provide the future of the economy and the appropriate standard of living for the population. This is a process in which the state, the local government, the private and the business sector work together to create more favourable conditions for the economic growth and the labour market” (Swinburn et al., 2004: 11. p.).

The role of LED is gradually increasing, since nowadays the local economies need to face more and more difficulties, such as globalization, economic crisis, national and regional challenges and their negative impacts (see e.g. Horska et. al. 2012). The aim is to meet the demand of the community, however, the cooperation of the community and the positive attitude to the developments as well as the common responsibility are inevitable (G. Fekete, 1998).

LED refers to the endogenous development approach as well, because according to Picchi (1994: 195. p.) *“endogenous development is to be understood as local development, produced mainly by local impulses and grounded largely on local resources”*. In contrast to the exogenous model, the benefits of development tend to be retained in the local economy and local values are respected (Slee, 1994). Terluin and Post (2001) emphasised the importance of local resources, local activities, local actors and the integrated approach in endogenous development.

Within rural policies the emphasis has long been shifted towards rural diversification, support for indigenous business, encouragement of local initiatives and local enterprises, provision of suitable training and bottom-up approach (Lowe et al., 1995). From “local point of view” the main advantages of bottom-up approach are the following:

- local actors have a better knowledge of local challenges that need to be addressed and the resource and opportunities available,
- therefore they are able to mobilise local resources for the development process in a way that does not happen with top-down approaches,
- this gives local actors a greater sense of ownership and commitment to the projects, which allows them to make the best of the local assets (EC, 2014b).

.Based on LEADER program, which has become an important element of rural development policy since 1991 with a high level of acceptance all over Europe, the EU put a big emphasis on community-led local development (CLLD) in the 2014-2020 programming period. CLLD is a tool at local level in developing responses to the social, environmental and economic challenges including the civil society and local economic actors in designing and implementing local integrated strategies that help their areas make a transition to a more sustainable future. It can be a particularly powerful tool, especially in times of crisis, showing that local communities can take concrete steps towards forms of economic development, which are smarter, more sustainable and more inclusive, in line with the Europe 2020 Strategy. Community-led local development shall be:

- focused on specific sub-regional areas,
- led by local action groups composed of representatives of public and private local socio-economic interests,
- carried out through integrated and multi-sectoral area-based local development strategies,
- designed taking into consideration local needs and potential, and shall include innovative features in the local context, networking and, where appropriate, cooperation.

The Commission expects CLLD to facilitate implementing integrated approaches among the European Structural and Investment Funds (ESI Funds) concerned to achieve at local level the 11 thematic objectives set out in the CPR²⁵. The Commission encourages the use of CLLD as it also allows local communities to take ownership of the objectives of the Europe 2020 Strategy. In line with the Common Strategic Framework Member States shall promote the development of local and sub-regional approaches, in particular via community-led local development (EC, 2014b).

The social economy

While the decline of the welfare state has been an important trigger in stimulating the growth and development of the social economy, other factors including changes to local economies, the exclusion of some vulnerable groups and a gradual move away from traditional conceptions of civil society organisations towards more dynamic, issue oriented organisations have also contributed to the reinvigoration of the sector. Social economy organisations have moved to fill the gaps left by the market and the state, and have shown themselves to be innovative,

²⁵ Regulation (EU) No 1303/2013 of the European Parliament and of the Council of 17 December 2013 laying down common provisions on the ERDF, the ESF, the CF, the EARFD and the EMFF and laying down general provisions on the ERDF, the ESF, the CF and the EMFF and repealing Council Regulation (EC) No 1083/2006 is referred to as CPR.

adaptable and responsive to local needs when provided with the opportunity and environment which enables them to fill their potential.

In Central and South East Europe, social economy organisations have played an important role in addressing the complex issues which the post-1989 transition period raised for both communities and for individuals (Noya and Clarence, 2007).

Based on Wallace et al. (2004) the informal economic activity in the transition countries of East-Central Europe was important in the socialist era as well as it is in the present market economy of these countries. *“The most autonomous and least integrated forms of household economic behaviour are the social economy and the household economy. Increasing dependence on these economies in these countries is associated with older, poorer people and those in peripheral areas. It leads very often to withdrawal from public and social life”* (Wallace et al., 2004 in Papp, 2011: 52. p.)

Sik (1992) argued that with the decomposition of the socialist system and with the population experiencing inflation, economic recession, pauperization of low-income people and erosion of the middle-income groups (like most of the transition countries), the formerly significant second economy can (and most likely will) transform into an even wider informal (third)²⁶ economy. In rural areas, due to the extremely rapidly rising unemployment, a combination of subsistence, petty commodity farming may often be possibility for survival.

The social economy is something of a contested concept, and intra-national differences in terminology and usage make it difficult to derive a consistent definition. There is however some consensus, particularly among continental European countries, that the social economy includes co-operatives²⁷, associations, mutuals and foundations. This derives from the French legalistic approach to defining the social economy, first employed in the 1970s (Monzon and Chavez, 2012).

Social economy means a sector of economic activity, which is *“not registered...and not uses money as a medium of exchange”* (Henry, 1982: 461. p.). Based on Papp (2011) who examined the large and diverse sector of economic activities outside formal economy, social economy as a part of informal economy is

²⁶ It is not uncommon to find that terms such as “third sector”, “third system”, and “social economy” are used interchangeably (see Noya and Clarence, 2007).

²⁷ Les and Jeliazkova (2007) highlight co-operatives, a vital part of the social economy in western Europe, North America and Australasia, confront significant hostility in Central and South East Europe and remain underdeveloped. This is a result of the use of the co-operative form during the Communist era as quasi-autonomous state bodies, which served to bring the form into disrepute, hindering its development in the post-Communist era.

an indistinct object of the social sciences, with a great number of vague and overlapping terms related to it.

Gershuny and Pahl (1981) divided the term into two distinct categories. They identify a household economy as “*production, not for money, by members of a household and predominantly for members of a household, of goods and services for which approximate substitutes might otherwise be purchased for money*”. They also identify the communal economy, which is “*production, not for money or barter, by an individual or group, of a commodity that might otherwise be purchasable and of which the producers are not principal consumers*” (Gershuny and Pahl, 1981 in Henry, 1982: 461. p.).

By Giegold and Arhelger (2011) social economy is a form of economy, which aims to achieve objectives other than profit. While commercial enterprises engage in economic activities to generate profit for their owners, social economy enterprises engage in economic activities for the sake of the activity they are engaging in. This means that social economy enterprises stand out due to their function and form. This form may be reflected in their legal form, and most often this is the case. But not all social and solidarity enterprises take specific legal forms. According to Henry (1982) social economy means the type of economic activities, which are not parasitic to regular economy, not monetized, not registered and accounted, but legal.

An International Labour Organization (ILO) report described the social and solidarity economy as “*a concept that refers to enterprises and organizations...which specifically produce goods, services and knowledge while pursuing economic and social aims and fostering solidarity*” (Fonteneau et al., 2011: vi. p.). Notably, the European Commission have defined the social economy as including co-operatives, mutual societies, non-profit associations, foundations and social enterprises (see EC, 2014c). Similarly, with regard to organisational form, the social economy was said to be comprised of associations, co-operatives, mutual organisations and foundations by Noya and Clarence (2007).

Moulaert and Nussbaumer (2005) point to the importance of democratic co-operation, reciprocity and equality as key principles within the social economy. Fonteneau et al. (2011) meanwhile suggest that some of the operating principles common to this sector are:

- participation, whereby members or users have a role in ownership and/or decision-making,
- solidarity or inclusion,
- innovation, which arises from their responsiveness to continually changing needs,
- voluntary involvement and autonomy, and

- a collective dimension, involving people coming together to address identified needs.

Analyzing SEOs and for-profit enterprises Borzaga and Tortia identified that the main difference between them is the overall aim of their activities, “*which in the case of SEOs has an explicit social dimension, rather than simply the pursuit of profit, and its distribution to owners, being the ultimate goal*” (Borzaga et al., 2007: 31. p.).

Based on Defourny and Delveterre (1999) the social economy includes all economic activities conducted by enterprises, primarily co-operatives, associations and mutual benefit societies, whose ethics convey the following principles:

- placing services to its members or to the community ahead of profit,
- autonomous management,
- a democratic decision-making process,
- the primacy of people and work over capital in the distribution of revenues.

In their study Westlund and Westerdahl used the term “new social economy” meaning that it forms a component of the third sector²⁸, that economic rather than purely idealistic activities are the principal concern of these organisations, but that other values are prominent as well. Adding the word “new” they emphasised the difference compared with the established cooperative movement, mutual life insurance companies and summed up the characteristics of the new social economy as follows:

- constitutes an economic field alongside the profit-maximising parts of the market economy and the activities conducted in the public sector,
- does not belong to the established producer or consumer cooperative movement or other classical mutual economic activity,
- has local roots and has a democratic structure (one man one vote or similar form of ownership and influence),
- the legal form shifts and is of subordinate importance (Westlund and Westerdahl, 1997).

The role of the social economy in Europe

²⁸ The term “third system”, derived from the European Commission’s 1997 pilot action “Third System and Employment”, has subsequently been broadened out to include all organisations that place a limit on profit distribution. This highlights the important distinction between the US and Europe, and the divergent paths they have taken. The label “social economy” has maintained this distinction (Noya and Clarence, 2007).

From the village farmers who set up a co-operative to market their produce more effectively, to the group of savers who set up a mutual-fund to ensure they each receive a decent pension, by way of charities and organisations offering services of general interest, the social economy touches a huge range of individuals across Europe. There are more than 11 million jobs in the social economy across Europe, but membership of social economy enterprises is much wider, with estimates ranging as high as 160 million (EC, 2014c).

According to Evans and Syrett (2007: 60. p.), “*there is strong evidence that the social economy is an important and growing contributor to the overall economy of Europe*”. Meanwhile Noya and Clarence (2007) suggest that SEOs can play an important part in fostering social inclusion. Job creation is one means by which this can be achieved.

Social economy enterprises represent 2 million enterprises (i.e. 10% of all European businesses) and employ over 11 million paid employees (the equivalent of 6-6,5% of the working population of the EU)²⁹ out of these, 70% are employed in non-profit associations, 26% in cooperatives and 3% in mutuals. Social economy enterprises are present in almost every sector of the economy, such as banking, insurance, agriculture, craft, various commercial services, and health and social services etc. (EC, 2014c).

OECD analyzed the distribution of SEOs by sector of operation in 2011. SEOs were heavily concentrated in service sector industries. The most popular fields were social assistance services (26%), education and training services (21.1%), work integration (19.6%) and culture and recreation (16.2%), while 5,4% of total SEOs operated in “Agriculture, forestry and fishing” (OECD, 2013).

Defining social enterprise is itself problematic and definitions - and indeed the nature - of social enterprise vary within and between countries (Kerlin, 2010). Delimiting the social economy and defining social enterprise are somewhat problematic, even within national contexts: at the international level this complexity is compounded by intra-national differences in legal structures, political contexts, business cultures, welfare provision arrangements, community norms, discourses about the social economy, and other factors. Some such differences were highlighted by Monzon and Chavez (2012) in their study of the European social

²⁹ Based on Monzon and Chavez (2012) in 2010 the social economy in Europe employed over 14 million people, equating to 6.5% of the EU’s wage earning population, however the authors are careful to highlight that differences in the way that data are collected within countries and at different points in time mean their statistics (and particularly comparison between the two points in time) should be treated with caution. Nonetheless it would seem that the social economy makes a sizeable contribution to aggregate employment in the EU.

economy, which showed for instance that the level of acceptance, or recognition and understanding of the social economy differed between European Countries.

Noya and Clarence suggest that social enterprise refers to “*any private activity conducted in the public interest, organised with an entrepreneurial strategy and whose main purpose is not the maximisation of profit, but the attainment of certain economic and social goals, and which, through the production of goods and services, brings innovative solutions to problems such as social exclusion and unemployment*” (Noya and Clarence, 2007: 248. p.).

A social enterprise “*is a private and autonomous organisation providing goods or services with an explicit aim to benefit the community, owned or managed by a group of citizens in which the material interest of investors is subject to limits. Attention to a broad or distributed democratic governance structure and multi-stakeholder participation is also important*” (Mendell and Nogales, 2009: 94. p.). The authors also point out that the social enterprise concept has become broader over time, and now incorporates co-operatives, non-profit and community-based businesses (Mendell and Nogales, 2009).

Social economy enterprises are characterised by a strong personal involvement of its members in the management of the company and the absence of seeking profits in order to remunerate shareholders capital. Due to their specific way of doing business which associates economic performance, democratic operation and solidarity amongst members, they also contribute to the implementation of important Community objectives, particularly in the fields of employment, social cohesion, regional and rural development, environmental protection, consumer protection, and social security policies (EC, 2014c).

Defourny and Nyssens (2008) suggest that work integration social enterprises (WISEs), which help low-qualified unemployed people who may otherwise be excluded from the labour markets, are one dominant type of social enterprise in some European countries. However, that work integration is not the objective of all SEOs, and there has been an expansion of social enterprise activity in other areas such as the provision of social and personal services in fields such as mental health, housing, health care and training. Such activities are likely to generate employment, but this is not necessarily the main purpose of the organisations undertaking them.

The composition of SEOs’ income sources varies considerably both between and within countries. Nevertheless, international research on non-profit organisations identifies three main revenue sources: income generating activities (including fees for services, sales, membership fees, rents, investments, business ventures, etc.); government funding; and philanthropy (including financial donations and in-kind support. As well as financial donations, philanthropy also includes the donation of time and other in kind resources, for instance through voluntary work (Salamon et al., 2003).

An important element of support for social economy organisations in Central and South East Europe is the idea of public benefit status which has been implemented in countries including Bulgaria, Romania, Poland, Latvia, Hungary and Lithuania. Whilst the form may be different, and the status may be awarded in framework legislation or other, specific legislation, the purpose of granting social economy organisations such status is to provide them with greater benefits than other organisations and to assist them to fulfil their contribution to wider society (Noya and Clarence, 2007).

Social economy entities are enterprises - in the majority micro, small and medium sized enterprises (SMEs) - and, as such, they are part of the Commission's enterprise policy aiming at promoting enterprises, in general and more specifically SMEs, independently of their business form. The EU policy in this area aims at creating a favourable regulatory environment for social economy enterprises so that they grow and prosper alongside other enterprises. The common characteristics of social economy enterprises may be summed up as follows:

- they contribute to a more efficient market competition and encourage solidarity and cohesion,
- their primary purpose is not to obtain a return on capital. They are, by nature, part of a stakeholder economy, whose enterprises are created by and for those with common needs, and accountable to those they are meant to serve,
- they are run generally in accordance with the principle of solidarity and mutuality and managed by the members on the basis of the rule of “one man, one vote”,
- they are flexible and innovative (they meet changing social and economic circumstances),
- they are based on active membership and commitment and very frequently on voluntary participation (EC, 2014c).

The social economy consists of an ensemble of activities and organisations, emerging from collective enterprises that pursue common principles and shared structural elements:

- the objective of the social economy enterprise is to serve its members or the community, instead of simply striving for financial profit;
- the social economy enterprise is autonomous of the State;
- in its statute and code of conduct, it establishes a democratic decision-making process that implies the necessary participation of users and workers;
- it prioritises people and work over capital in the distribution of revenue and surplus;

- its activities are based on principles of participation, empowerment, and individual and collective responsibility (Neamtan, 2002).

The social enterprises operate nowadays on four main fields which were grouped by Giegold and Arhelger (2011) as follows: Improving employment and social cohesion (worker cooperatives, social service providers of the social and solidarity economy); Finance for people, not profit (cooperative banks and credit union, microcredit, mutual insurance societies, regional currencies); Sustainable Infrastructure (social and cooperative housing, infrastructure cooperatives); and Fairness for producers, consumers and nature (community-based agriculture, retail and consumer cooperatives, fair trade)

Agriculture and social economy

In recent years social farming activities have come to the attention of an increasing range of rural stakeholders. This is the result of a growing perception of the role and potential positive impact of agricultural and rural resources on the social, physical and mental well-being of people. Social farming also represents a new opportunity for farmers to deliver alternative services to broaden and diversify the scope of their activities and their role in society. This integration between agricultural and social activities can also provide farmers with new sources of income and enhance the image and utility of agriculture in the public eye (EC, 2010).

While there is no universally agreed definition of the concept of social farming, there is broad agreement among practitioners, researchers and other stakeholders that it concerns all activities that use agricultural resources to promote, or to generate, social services in rural areas (Di Iacovo and O'Connor, 2009).

While social farming can primarily be located within the concepts of multifunctional agriculture and social care, it encompasses a broad range of stakeholders from different sectors, institutions and constituencies. Such stakeholders can range from local, regional and national authorities associated with all of the sectors outlined above to service-users of social farms and their representatives, farming organisations, rural development actors and service providers associated with health and social care services (EC, 2010).

A hallmark of social farming across Europe is the diversity which exists in terms of structure and organisation; the profile of the service users; the nature of the activity; the stage of development; and the institutional and policy environment. For example, social farms can be differentiated on the basis of their organisational form ranging from family-based, privately-owned social farms, to social co-operatives operated by third sector or non-profit organisations, or institutional farms operated directly by public bodies in arenas such as health, social care, justice or education.

Social farming initiatives can address a range of target groups or service users (EC 2010).

Turning to the broader issue of how social farming can impact on rural areas, Di Iacovo and O'Connor cite a number of ways. Fundamentally, it has the potential to further broaden, diversify and add value to multifunctional agriculture. It offers the opportunity for the creation of new markets for farmers through the transformation of public goods or positive externalities into private and semi-private goods. Social farming can be seen as a way of promoting innovative patterns of rural development that are rooted in local resources and processes of change. More specifically, social farming offers clear opportunities for diversification of on-farm activities, while also represent an opportunity to reduce the lack of services in rural areas and to re-design them in a more innovative way (Di Iacovo and O'Connor, 2009).

Based on several research studies undertaken within European projects the paper of the European Network for Rural Development summarized the broad benefits of social farming. Due to its interdisciplinary nature, social farming has the opportunity to be interconnected with a number of different sectors in rural areas such as agriculture, enterprise start up, welfare, health and environmental improvements. This multi-functional nature enables social farms to develop a range of benefits, including:

- Additional sources of income for farmers - Social Farming activities are important sources of diversification for farmers and as a potential new source of income for the farming household. The availability of this new opportunity can be crucial especially for small farmers. This new activity can provide the additional income required to enable these small farms to continue, thereby reducing the risk of land abandonment and helping to preserve local nature and cultural traditions;
- Enterprise start up - many Social Farming projects are established as new enterprises based on farms rather than as a farm diversification themselves. These new enterprises offer employment opportunities to local people in rural areas, reducing the commuting phenomenon and the loss of young people that continues to be a significant problem;
- Improvement of the quality of services offered in rural areas is one of the most important benefits Social Farming initiatives bring to rural areas. The accessibility of services in many rural locations remains limited however the implementation of Social Farming projects enables access to a range of services for people with disabilities, children and elderly people;
- Enhancement of the efficiency of the welfare system - in many countries the welfare system is experiencing an increasingly difficult financial situation, and in some cases is less able to respond to the specific

needs of service users. Social Farming initiatives have the ability to offer services better tailored to these specific needs than the welfare system is able to achieve. Clients are able to experience a real working environment, enjoy activities specifically designed to meet their needs, take responsibility for farm activity and interact with a range of people outside of their specific client group. This improves their social capability, and enhances their self-esteem;

- Environmental improvements - many Social Farms practice environmentally sensitive farming methods and so have the potential to impact positively on the landscape and biodiversity of rural areas. Social Farming initiatives have a more general role in improving the viability and vitality of local areas including enhancing their reputation, generating increases in economic activity and importantly improving the general public's impression of agriculture and agricultural areas (EC 2010).

Community-based farming is farming supported by an organisation of local producers and local consumers. The produce is distributed primarily to members of the organisation or other local dwellers. Commonly, these organisations take the legal form of associations or, sometimes, cooperatives³⁰. Several arguments support community-based farming:

- First, local producer and consumer organisations contribute to sustainable agricultural production and distribution. They shorten supply routes and thus reduce energy costs and pollution, especially when their produce is regional and seasonal. Additionally, community-based farming often uses regionally adapted and organic production methods promoting biodiversity;

- Second, community-based farming leads to more transparency, since consumers and farmers maintain closer relations. Consumers can have immediate insight into the production process;

- Finally, community-based farming can help overcoming the demographic challenge in European agriculture. Especially for young farmers it is more attractive than industrial production.

The core function of an agricultural cooperative is to improve the bargaining power of their members. As soon as an agricultural cooperative represents a significant part of producers, they have more power in negotiations and can achieve better prices when selling their produce. If cooperatives respect the principles of the social and solidarity economy, they respect the principle "one person, one vote". They serve the interest of farmers with high production levels as much as farmers

³⁰ Classic agricultural cooperatives on the other hand unite only farmers, helping them to distribute their produce, either to processing enterprises or to retail chains.

with lower production levels. So, without cooperatives especially small farmers would be in very weak bargaining positions and forced to give up their farms. Thus, to some extent cooperatives have been helpful in slowing down the process of industrialisation and concentration in the agricultural sector (Giegold and Arhelger, 2011).

Social economy and local development

Grefe highlights the ability of social economy organisations to meet local needs and also their capacity to adapt and respond flexibly to changes at the local level which makes such organisations so important to local development. This is more than simply the benefits of operating at the local level, but is a result of the intrinsic features of social economy organisations. Local development, if it is to be effective, requires positive links between the various dimensions (economic, social and environmental) of local development, a positive relationship between all of the actors involved, social capital, and an agreement on the long-term approach to be taken (Grefe, 2007). It is these very points which give social economy organisations such a valuable role in the local development process. The ability of social economy organisations to make linkages to, and across, the various dimensions of local development is important because it enables an over-arching vision to be developed. The focus is not upon one dimension, or one type of activity only, but on the conjunctions between

dimensions and activities and the potential positive, and negative, outcomes. This not only aids the development and implementation of effective policies and programmes for local development, but also assists in generating other results, such as building greater levels of social capital within communities and fostering social inclusion (Noya and Clarence, 2007).

By traditionally presenting itself as an alternative to the market and to public production, the social economy has always claimed to play a pioneering role in the allocation of resources. From an empirical perspective, various links appear between local development and the social economy. It is generally agreed that local development needs:

- a synergy between the various actors in a given territory,
- a positive association of economic, social and environmental dimensions,
- an agreement on long-term development prospects,
- social capital to consolidate the partnerships.

That is why terms such as local development, good governance, partnership and sustainable development are intertwined and mutually dependant (Grefe, 2007). Due to their very nature, social economy organisations can flexibly adapt to local development needs. Not committed to maximising financial profit, social

economy organisations can take into consideration the values and expectations of actors in the field of local development, and the long-term effects of decisions, as well as define actual development strategies. There are three main processes through which social economy organisations contribute to local development, namely that: 1) they are able to consider the external costs resulting from a split between the economic and social dimensions and act as a lever for integration; 2) they offset information asymmetries and stimulate new productive behaviour; and, 3) that social economy organisations reduce moral hazards and create trust and social capital, which may in turn encourage the implementation of interdependent projects.

There is no single, “one size fits all” approach which can ensure the viability of the social economy and any attempt to import an approach without considering national, regional and local specificities is unlikely to meet the needs of the social economy.

The most suitable concept of local development usable in social economy context is one in which development is not merely the growth of aggregate variables, such as production and employment, but is the composite result of demands and needs coming from social actors. The above mentioned bottom-up approach to local development, where development is the endogenous result of objectives expressed at the local level, has long been put forward by authors (e.g. Sugden and Wilson, 2002; Sacchetti and Sugden, 2002), and its integration in the role of social economy organisations is required (Noya and Clarence, 2007).

Local economic development is not simply just “local”, but it is based on local interests and needs. It’s goal is to support local market by encouraging local enterprises and economic activities for local communities. It’s aim is therefore not just economical, but basically social and community based: improving the quality of life of local people instead of maximizing profit at any cost. Therefore “*referring to both the conceptual and the methodological approach it could be called community based local economic development as well*” (Czene and Ricz, 2010: 16.p.) This is why it becomes clear that social economy and local economic development have common characteristics. Both has the same roots and are characterized by the primacy of social objectives, however they are not considered as being completely overlap each other. The social economy initiatives could surpass the locality and LED does not solely focus on the non-profit sector. G. Fekete (2011) identified the common elements of these two terms as follows:

1. Social enterprises: especially important in case of the lack of profit-oriented enterprises, parallel with significant local resources and free labour force that could be utilized;

2. Preference of local products: supporting local entrepreneurs in addition to the interests of ecological benefit (reduction of transportation distances, reduce the use of chemicals, GMO avoidance) and local consumers.

- direct sales of local producers assumes the evolving conditions of local markets (bypassing intermediate trade) and of on-site sale methods, and reveal of local products,

- strengthen of local and regional self-sufficiency by providing capacity and coordination for covering full range of local consumer demand with local products contributes local livelihood in two aspects - in one hand ensures good quality goods and in the other increases local revenues - that may result in further expansion of the local market,

- conscious shopping also contributes keeping money in locality and strengthening local producers.

3. Services meeting local needs: local jobs and better living conditions could be provided partly by social care, personal and household services (e.g. child and elder care, cleaning, gardening, maintenance), and partly by settlement maintenance activities (maintenance of public spaces, public services, public transport, operation of the communication channels etc.);

4. Fair financing: solutions for capital deficit as the biggest problem of local people aim at avoiding interest charges at least partially and replacing cash flow as well.

Trust and local networks as social capital have a determinate role in each items listed above. The presence of social economy as a part of local answers given to global challenges is influenced by local nature of social, economical and environmental space. In rural areas social economy demands inevitably local cooperation. It is the condition of the right scale and concentration ensuring economic viability. The relative strength of traditional communities helps the social aspects, meanwhile the closure of local networks, the smaller weight of NGOs and the distrust against new things could become barriers (G. Fekete, 2011).

Conclusions

With greater levels of uncertainty, as a result of economic, geo-political and social forces, the social economy has the potential to address the needs of local communities as they respond to these forces. Within the European Union, the key issues of slow economic growth, unemployment, inequalities within and between countries, the impact of enlargement and migration, and the implications of an aging population, are identified by Lloyd (2007) as important in our understanding of the possible role and contribution of the social economy.

The social economy offers an approach to local development, which provides potential for a new vision and additional elements compared to traditional approaches. It does this by widening the structure of a local economy and labour market by addressing unmet needs and producing new/different goods and services, and by widening the focus of the local development process by taking into consideration the variety of its dimension and in building the required trust (Noya and Clarence, 2007).

Social and community based farming can have beneficial impacts on the viability of rural areas and there is significant potential for the sector to be developed further. Rural development programme (RDP) funds combined with strategic National Rural Network support do therefore have a significant role to play in supporting sustainable growth in the sector and should be targeted at the following types of activity:

- Bring local actors together with Local Action Groups to develop understanding of the sector and identify social farming as an explicit target group within their delivery plans.
- Develop national, or where more appropriate, regional support networks involving key stakeholders from all the relevant sectors including health and social care. Harness the network to provide a policy lobbying role, raise awareness and understanding of the sector, deliver training and educational courses, develop quality criteria, and act as a “match making” service for social farms.
- Disseminate key RDP information to all existing and potential social farming initiatives, and circulate this information to RDP fund administrators.
- Provide mentoring support to new and existing social farms to provide funding advice and support as well as specific business advice.
- Consolidate existing research, identify key gaps and conduct further relevant research to build the evidence base of the beneficial outputs and outcomes of social farming. Expand this research to provide information on the economics of delivering social farming initiatives. Develop a shared and accepted definition of social farming.
- Develop a network of Best Practice farms to support the dissemination of information to sector practitioners and importantly the health and social care sectors. This activity could be co-ordinated at a European level.
- Work trans-nationally to develop cross boarder initiatives which further support the growth of the sector. With each country following a

similar development pattern social farming provides an ideal opportunity for successful transnational co-operation.

Finally, summing up the theoretical overview it can be stated that community based local economic development could be the common area of local economic development and the social economy. From this point of view, social economy enterprises, cooperatives and community based (or social) farming are able to contribute to the local development strategies in rural areas of Europe.

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WITOLD JEDYNAK

THE INFLUENCE OF CATHOLIC PARISHES ON THE EMERGENCE OF LOCAL COMMUNITIES IN RZESZÓW

Introduction

The contemporary society is a mass society. Industrialization and urbanization effectively disrupt the coherence of a local system, and individuals fall under the influence of the state macrostructure. Also, dynamic migration processes make the link with one's place of residence weaker. The differences between a city and a village disappear, thus cultural, social and spatial unification of human habitats. Due to the intense process of mass society emergence, that seems to be one-way, irreversible and definitive, interest in localness arises, characterized by the sense of social ties and individual cultural identity. In local communities, usually inhabiting a small area, strong bonds occur, resulting from common interests and needs as well as from the sense of belonging to the inhabited place. Local communities are formed by people interacting and interrelated on a particular territory. These people have common interests and a sense of group and spatial identity. (Sowa, 1989, pp. 23-24; Starosta, 1995, pp. 19-20).

In Polish society, a Catholic parish has played the key role in establishing local communities, always. Its most important and specific feature is the bond between the believers, strong identification with the local religious community and its territory. Regarding that a Catholic parish has a community-forming character, the author of this paper intends to present the influence of Catholic parishes on the emergence of local communities in the city of Rzeszów. This city is an interesting subject of sociological research. Since 1945, the number of Rzeszów residents increased sixfold (29,500 in 1945). The city was practically built anew, as over 70% of its residents were migrants from the nearby villages and towns. To the new inhabitants, Rzeszów was attractive due to the employment, educational and social advancement opportunities. The city grew and, at the same time, the church authorities established parishes that became the basis for local communities.

This paper is aimed at presenting the process of local communities emergence, based on Catholic parishes. The publication was based on sociological field research (in-depth unstructured interviews with the leaders of local parish communities) and secondary sources.

The localness of a Catholic parish

In Poland, a Catholic parish is a common and the most stable local social institution, well-established in the lives of cities, towns and villages residents. In a parish, an individual becomes a part of a religious community and is bonded with other believers. Parishioners are all christened residents on the parish territory. Their involvement in the believers community is full when they know, accept and live by the rules and values of the Church. Parishioners take part in religious practices and acknowledge moral standards, thus accepting patterns of behaviour characteristic of Catholic communities. What is more, they also participate in joint activities, undertaken for the parish sake, that enable establishing normalized and quite long-lasting interactions. Parishioners have a sense of subjective and intentional involvement in a local social and religious community, so they identify themselves and feel closely connected with the parish (Firlit, 1998, pp. 34-35, Firlit, 2000, pp. 107).

Many believers perceive their parish as their little homeland, a private homeland as Stanisław Ossowski writes. It is a group (communal) correlative of social awareness that is related not only to people constituting this community, the first one in the life of every human being, but also to the territory this community inhabits. Basic components of a private homeland are: people and space (the land) being the objects of emotional attachment, known from direct experience, personal contacts and relationships. The attitude towards a private homeland is accompanied by a belief, resulting from faith, that the connection between a man and his homeland is a special one, predestined and deeply involving his personality. The emotional attitude towards a private homeland is supported by a moral obligation to love the region that is the private homeland. A believer is emotionally attached to their parish, their little homeland, because it shapes their social personality, even their life. The parish most important places are home, church and cemetery (Ossowski, 1967, pp. 217-226).

A Catholic parish becomes a local community if parishioners inhabiting its territory are closely connected by the joint religious and social needs, and by the sense of group and spatial identity. That is why, for a local parish community to function properly, the number of believers and the area are crucial. If the parish is to be the centre of social integration and a cultural identity creator, as well as a religious community that meets believers' religious needs and affects their attitudes and behaviour, it should meet particular requirements regarding the number of believers and territory. Usually, city parishes are not expansive, but overpopulation may be their problem. Too high population makes the parish unable to meet requirements necessary for local community emergence. So when preparing a pastoral strategy for Rzeszów, the church authorities tried to create parishes

consisting of several thousand believers – communities that would be able to perform their basic functions (interviews: W-1, W-2, Majka, 1971, p. 91).

The development of parish structure in Rzeszów

In Rzeszów, there is a close correlation between the city and parish structure development. The spatial and demographic development of the city is accompanied by the transformation of Catholic parishes structure. In 1949, Rzeszów and nearby villages constituted one parish. As new housing estates were built, the church authorities established independent units of church administration for their residents. At present, there are 31 Catholic parishes in the city. Their foundation resulted in the emergence of many local communities.

Two periods can be distinguished in the process of local parish communities emergence in Rzeszów. The first one fell at the time of communist rule in Poland (1945-1989), the second begun with the fall of the communist regime and civil society emergence. The city developed most dynamically during the first period. From 1946 to 1989, the number of city residents increased fivefold and amounted to 151,000. At present, the capital city of Podkarpackie is inhabited by 185,200 people (on 3 Nov 2014). At the same time, Rzeszów dynamic spatial development occurred. Since 1951, its territory expanded by fourteen times and now comes to 162.3 km² (Malikowski, 1991, pp. 151-155; Bonusiak, 2010, pp. 144-145; Rzeszów City Office (1); Rzeszów City Office (2)).

The process of new parishes creation was particularly complicated and difficult under the communist rule. According to the communist authorities, Rzeszów was to be a leading and model socialist city without new parishes or churches. Consequently, both the administrative authorities and security service reacted quickly and sharply to priests and laymen initiatives for establishing new parishes or building new churches. All such ventures were combated by the communist authorities. Both clergymen and laymen involved in creating new parishes and building new churches were oppressed by the communist authorities. Many people were dismissed from work or school, others were fined. Those most active were given prison sentences, usually suspended. The fall of the totalitarian regime was the beginning of the second period of Rzeszów parishes reorganization. The democratization of social life and civil society emergence favoured the development of parish structure which was untroubled and depended on the city residents' needs (interview W-3; Mac, 2007, p. 15; Ryba, 2007, pp. 37-38, Jedynak, 2012, p. 16-17)

Establishing new parishes, accompanied by cooperation between residents of each housing estate, led to parishioners integration. A strong bond between Catholic clergymen and laymen and acting for the common good resulted in the emergence of local parish communities and a network of parish churches, despite hard and

adverse conditions of the totalitarian regime. In 1991, in Rzeszów, there were 22 parishes with 156,800 residents. On average, there were 7,100 residents in one parish. Only three parishes had more than 10,000 residents (11,000, 11,6000, 15,000). All parishes had their churches where the local believers community could meet, pray and integrate. (Schematyzm 1991, pp. 262-282).

The change in the country's political situation after 1989 resulted in the development of Rzeszów parish structure and the process of building new churches was no longer hampered by the state or local authorities. Guided by the believers' needs, the church authorities founded five new parishes in Rzeszów. Furthermore, between 2006 and 2010, four rural parishes were incorporated in the city limits (Schematyzm 2010; Rzeszów City Office (2); Parafie w Rzeszowie/ Parishes in Rzeszów; Rzeszów Diocese).

Due to the reorganization of parishes and alteration of city limits, there were 31 parishes on 116.3 km² at the end of 2014, in Rzeszów. They were inhabited by 185,000 people. Statistically, an average parish covers less than 4 km², and an average number of residents in one parish comes to almost 6,000.

The emergence of local communities on the basis of Catholic parishes

Organizing church structure in Rzeszów as well as the social phenomenon of church building influenced the emergence of local communities, directly. The believers cooperation on parish creation and church construction strengthened the determination and sense of religious and local solidarity among the Catholics. Joint effort and involvement released the spirit of diligence, dedication and devotion, and improved self-confidence. Carrying out such a venture, financially and logistically overwhelming, required the parishioners' spare time and teamwork. Cooperation strengthened the bond between parishioners and enhanced positive relationship between believers and priests. Many people felt closely connected to their parish and church built with such great effort. Working together made it possible for human relationships to be built, enhanced the dedication to the common good and deepened attachment to their own parish even among the not particularly religious people. The involvement of almost all parishioners made the local community strong and integrated, and taught being active not only in the religious but also social and patriotic field. Many previously anonymous and uncommitted people joined in and took up various roles in their local parish communities (interviews: W-1, W-2, W-3, W-4).

Establishing parishes and constructing churches in new housing estates with a varied demographic structure was very important for integration and stabilization. Rural population migrating to the city was especially exposed to traditional local ties breakup and progressing isolation. What is more, the inhabitants of housing estates were exposed to negative consequences of industrialization and urbanization

which relativized attitudes, behaviour, and religious and ethical values. Establishing parishes made it possible to meet basic religious needs, and allowed to preserve the attachment to Catholic faith and tradition instilled at home. What is more, taking part in parish church construction gave an opportunity to develop new, long-lasting social relationships, integrate into new place of residence, strengthen the sense of stability and the bond with the parish, and provoked to put down roots, locally. Also, that participation intensified religious practices and influenced moral attitudes. Thanks to founding parishes and building churches, local communities emerged and developed in Rzeszów. At new churches, prayer groups, associations and fraternities were created, and their activity proved the increase of personal involvement in the life of a parish, local and regional community (interviews: W-2, W-3, W-4; Bełch, 1990, pp. 201-203; Bełch, 2003, pp. 226-227; Jedynak, 2010, pp. 16-18; Szereyko, 1994, pp. 92-104).

One of the then contributors, a member of the Catholic Action at the Rzeszów cathedral, remembers that those building the cathedral were convinced they also were building a local parish community: “We do not build walls only, but new life here, new group of people joined by work, care and place of residence. These people are to be a one, big family, for better and for worse, joined by mutual care, mutual help. Here, a new, beautiful life begins, a new Parish is born” (Rylski, 2010, p. 50).

Sociological research confirm that creating new parishes and constructing new churches in Rzeszów, especially during the communist rule, affected the Catholics integration, their religious and social activity. According to sociologist Marian Malikowski, who conducted research in Rzeszów at that time, conflicts between the local parish communities and communist authorities usually ended in the victory of church communities that became more integrated and reinforced. Due to the Catholics determination, churches were built despite official objections and security service interventions, usually at sites indicated by the church authorities, and the parishioners bond with the parish became stronger, they became more resistant to repression and showed greater solidarity. Each victory of believers increased their social status and prestige, whereas the communist authorities, “often undecided and acting <undercover>, wasted time and lost their authority in such conflicts” (Malikowski, 1991, p. 333). A similar assessment of the phenomenon of parishes emergence and churches construction is presented by Elżbieta Firlit, a religion sociologist: “Parish churches construction was [...] not only a building investment, requiring material input from local residents, but also a symbolic, ideological one, and, on the grounds of local social life, it contributed to the integration and solidarity of parishioners involved, and was an example of a bottom-up initiative and collective activity evading the institutional supervision of totalitarian state authorities” (Firlit, 1998, p. 118).

The link between creation of new parishes and emergence of local communities is also pointed out by Jan Draus, involved in parish ministry and a “Solidarity” activist. He is convinced that establishing new parishes and building new churches played a major role in the process of local communities emergence. “These facts, unprecedented, show the strength and ability of the laity, the parish resilience, the properly conducted pastoral work, as the development of churches was accompanied by the development of live Church, dynamic Church, Church responding to growing internal demands [...]. The hitherto pastoral work, inspired by the Catholic social teaching, resulted in laity actuation. Then, a rapid development of farmers, workers, intellectuals and others ministries occurred” (Draus, 1988, p. 14).

In the local parish communities of Rzeszów, a continuity of social processes is observed as well as their transformation and modification on the social basis directly connected to the group tradition. The past influences the lives of city residents who inherit particular values and customs. Sociological researches confirm that active and strong religiosity is characteristic of Rzeszów residents, and religion is still one of the basic identity components. Parishes evangelization activity is not limited to tasks related to their status of a religious and church institution. They not only are the basic form of the Church presence in public life, but also they try to focus their pastoral activity on the most important areas of human life. They promote Christian culture, support religious and patriotic organizations, inspire charity, conduct prophylactic actions, help addicts, run kindergartens and sociotherapeutic centres, organize holiday camps for children, take care of the parishioners intellectual formation, cooperate with local government units and other institutions. And church infrastructure serves both the religious and cultural needs of the Catholics. In many cases, churches or parish houses are used by the believers to meet during national or local festivals. There, concerts, exhibitions, lectures, symposia, performances, meetings, ceremonies etc. are organized by and for various groups and associations (interviews: W-2, W-3, W-4)

Despite the ongoing process of society secularization, the majority of Catholics from Rzeszów are attached to their parishes, and involved in parish religious and social life. Those most active are usually members of parish communities and Catholic associations. Often, these people have been connected to the parish for a long time, they give their offerings readily, they regularly attend the mass and frequently participate in the Holy Communion, and they put religiosity with morality together in their everyday life. Many of those most identified with their parish took part in church infrastructure construction, that is why their bond with the parish is usually an emotional one. They are aware that their effort, offerings and prayer became an important part of a local parish community and church infrastructure. Those most meritorious are now in their middle or old age.

But, the activity and involvement in the life of a local community, inspired years ago, and strong attachment to their own parish and church still affect not only the attitudes and behaviour of these people, but also their descendants who inherit their values (interviews: W-2, W-3, W-4).

Summary

Founding new parishes in Rzeszów required both the clergy and laity involvement. Organizing the network of parishes and church building enhanced the emergence of various forms of social cooperation, increased the Catholics activity and strengthened local social ties. Being a member of a parish community was helpful in expanding and transforming social ties, integrating with new place of residence and in strengthening the sense of religious and moral stability. The consolidation of Catholics in parishes resulted from moral values internalization, having the same religious beliefs, co-participating in collective religious rituals, but especially from being a member of a community of shared beliefs and participating in events. The fact of belonging to a parish influenced the quality of believers' everyday life, as they acted in a similar way both individually (personal religious activity) and collectively (taking part in a group religious cult). All these factors had an effect on the emergence of local communities in Rzeszów.

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DOROTA RYNKOWSKA

**IMIGRATIONAL FAMILIES IN THE CONTEXT OF LOCAL
ACTIVITIES OF SOCIAL ASSISTANCE INSTITUTIONS**

Introduction

The political changes, that happened in Poland after 1989, led to the increased social activity. The democratization and decentralization of the state allowed to cede the programs of social assistance from the governmental institutions to local authorities and started a great number of local initiatives. Because modern social assistance has multidimensional character, we can examine it in at least two dimensions: of broadly understood family policy and of the state, non-governmental support and help institutions, which function in local communities. It seems that in the discussed context the local perspective is of particular importance, as it allows better perception and understanding of the problems which exist in a given local community, occupational group or a family. The expansion of the outreach activities, which happened at the time of the political changes, is also visible through the local activities provided to families by social assistance institutions. Placing a family in the context of a community allows to undertake more effective measures for providing help and support to dysfunctional families.

A family is a fundamental environment of life for every man. It is treated as “a small community, a primitive group and, at the same time, a point of reference – most frequently based on the natural foundation (kinship) or adoption and which is, to a greater or lesser extent, an organized form of a community (both – informal and formal), where members take on specific roles in the process of upbringing”.(Kawula,2014,p.21) It is a fundamental social group which should create a solid foundation for upbringing and the development of a young generation. At the World Youth Day in Maastricht in May 1995, when talking about the family, John Paul II pointed out that “a family is a place where we learn to exist.(Minkiewicz, 2003,p.286)The progress of civilization, the crisis, the lack of economic and emotional stability, together with the far-reaching consumerism, lead to the intensive transformations, which also affect families and the way they function. One of the signs of those changes is the phenomenon of labour migration outside the country of origin.

Terminology differentiation (migrations, migrational family, euro-orphanhood)

The fact that Poland joined the European Union in 2004 allowed free migration and taking up employment outside the country of origin. This resulted in the increase of the number of temporarily single-parent families. The main direction of migration is still our western neighbours, but countries like the United Kingdom, Ireland, Scandinavia, Spain, Italy and the Benelux countries have also become popular in the last decade. The research shows that the number of Poles who have at least one family member working in one of the EU countries has been steadily rising since 2004. (Pokrzywa, 2008, p. 69) The phenomenon of migration, regardless its type, causes a number of complex problems - both on an individual as well as social level. The situation of a migrating family member or the whole family depends on many factors and leads to the changes in a lifestyle related to, e.g. health risk factors such as, first of all, the separation from the family. Rising unemployment and poverty, which are the reasons for social migration, have a lot of people decide to take up employment abroad, leaving their under-aged children behind. Modern social assistance needs to face new challenges and dangers which result from labour migration, especially on a local scale, where members of such families are direct clients of social assistance institutions.

One of the most serious results of migration is a family breakdown and a difficult situation of its under-aged members. Situations, in which family members are separated from one another due to migration, may be characterized by a specific emotional climate – between spouses and between all family members. Due to separation caused by migration, the feeling of longing and loneliness rapidly arouses and the feeling of security disappears. The most difficult situation is when both parents decide to emigrate, leaving their under-aged children behind.

It leads to the disruption in the continuity and stability of the functioning of a family and to dysfunctions in the form of role swapping. This results in the dysfunctional process of upbringing and socialization of a child. (Błaszczuk, Rynkowska, 2014, p. 174) When making a decision of going abroad, a lot of people decide to leave their families behind, also their under-aged children: "(...) the embarrassing side effect of a migration wave is abandoning dozens of thousands of children who are outside their parents' plans and who are left behind. But even those taken abroad go through the tragedy of uprooting. Emigration tears families apart. Especially those that are already unstable" (Winnicka, 2007, p. 34) Children brought up in a migrational family have their needs of psychological and social nature unfulfilled and this emotional deficit is compensated by expensive presents and gadgets given to them by their parents. This has a negative effect on the development of attitudes and personality of a child who is not fully aware of the value of money. The lack of parental support and care in the period of adolescence

is dangerous for the well-being and safety of a child. This consequently creates stressful situations which a child tries to cope with by resorting to psychoactive substances or peer violence. This is confirmed by various care and educational institutions, police, family courts and social workers who are in direct contact with such families.

At present, in our country, we are witnessing the increase in the number of temporarily single-parent families, i.e. migrational families. In such families the character of the roles taken on by each family member depends on a socio-economic situation of the whole family. An unfavourable and difficult economic situation of a family leads to the decision of labour migration of one or both parents. Temporary labour migrations, which are most common in Poland, lead to the rapid improvement of the economic situation of a family but, on the other hand, to the destabilization and separation of the closest family members. The environment of a family is a fundamental aspect of life of every man. A family should serve certain functions, especially for its under-aged members, through the accomplishment of aims which ensure the proper functioning of individuals in the society. Due to the absence of one or both parents, there is a serious disturbance in the area of roles and tasks taken on by each family member. The role of upbringing and providing care is taken on by one parent and, more and more frequently, by grandparents. The second category of guardians is particularly worrying and instils fear, as grandparents - seniors, are often in their elderly, with long-term medical problems and it is them who often require professional care and support. If this is the case, their under-aged grandchildren take on the responsibility of providing care and nursing to them, the role which they are most likely not ready for. A parent who stays in the country of origin, takes on responsibilities and roles of both parents, trying to compensate losses by making sacrifices and that consequently weakens the position of an absent parent.

Most frequently it relates to mothers who have to reconcile their usual responsibilities with the new ones. A mother becomes the source of support and fulfilment of various needs. However, as numerous research shows healthy development of a child is only possible when there are two parents who fulfil specific parental roles: "the presence of both role models makes it easy for a child to learn types of behaviour specific for a given sex. What is more, it is parents who, through their presence, provide their children with the right behavioural models"(Jarosz,1987,p.85) Observing the relationship between parents and the atmosphere in a family, children unconsciously identify themselves with the behavioural models and attitudes, which they will, most likely, replicate in their adulthood. In a migrational family it may happen that the responsibilities of an absent parent are partly taken over by the oldest child in the family. If this the case, they become a mature partner too early and they have to face heavy responsibilities

and obligations which are beyond their ability to handle. They learn to organize their own time and the time of their younger siblings. They also learn to manage the household and to face the sickness, indisposition or conflicts between siblings. The occurrence of negative behaviour, caused by the separation from their parents, depends on the age of a child. It is observed that children in their preschool years want to draw attention of others excessively. When it comes to primary school children they more often skip classes, their school performance deteriorates, they resort to various stimulants and they have emotional problems. With age the scale of the problems, caused by the labour migration of their parents, increases.(Porada,2010,p.108) The younger a child, the effects of separation are stronger and further-reaching. Due to the absence of one of the parents, migrational families have serious difficulties in fulfilling fundamental and other kinds of needs. This depends on the individual factors of the development of a child and a family.

The period of separation and the risk of the breakdown of family bonds may result in divorce and in a situation in which the care of children is provided permanently by one parent only. This consequently worsens the situation of a child who thinks that they are responsible for a family breakdown because, e.g. they have been naughty during the absence of one of the parents, they haven't studied hard enough or they haven't met their parents' expectations and that's why parents stopped loving them. What also needs to be observed is the fact that, despite frequent emotional ambivalence, caused by the migration of one of the parents, the relation between a child and the other parent becomes tighter. This leads to the deficit of feelings and the feeling of longing for an absent parent, who becomes an imaginary hero. Upon their return, parents try to make up for their absence with presents. What is more, they break the rules and neglect the duties that apply while they are away. The fact is that, during their absence, a family acquires new habits and often a new lifestyle which differ from the one that absent parents are used to. Spending longer time away from home, parents – migrants have a limited access to information about their family. What is more, this information is very often hidden from them. This may lead to the feeling of alienation, isolation and even the feeling of exclusion.

At the moment, the scale of the intensity of labour migration of Poles resulted in the occurrence of a new phenomenon in the social discourse, i.e. "euro-orphanhood", a term used to define a specific form of social orphanhood.

The data shows that, at present, over 100 thousand children are brought up without at least one of their parents. According to the definition of the Ministry of National Education "the term euro-orphanhood is to be understood as a situation in which labour emigration of a parent/parents leads to the disturbance of the fundamental functions of a family, such as the continuity of the process of socialization, the emotional support of a child and the cultural transmission. Such

understanding of euro-orphanhood means that not every child, whose parent/parents leave to work abroad, should be treated as an euro-orphan”.(Markowski,2008) At the same time, the Ministry of National Education underlines the fact that this statement should not be treated as the foundation for the development of a uniform and binding definition, as it is not complete and sufficient.

Therefore, as a term, euro-orphanhood outlines a situation in which one or both parents go abroad - mainly to take up employment. We can talk about full euro-orphanhood (mono-parental) or partial euro-orphanhood (bi-parental). It is also indicated that the term “euro-orphanhood” may stigmatize children and worsen their already difficult situation that results from the lack of adequate parental care. Treating children as euro-orphans just because their parent/parents go abroad exclusively for work but stay in a close contact with their family, may cause far-reaching stigmatization and may leave no room for activities provided by care and support institutions. It needs to be remembered that, from the formal point of view, we can talk about orphanhood when a replacement institution takes over the care of under-aged children.(Sordyl,2007,p.205) Data published by the Ministry of Labour and Social Policy in 2007 show the negative influence of parental labour migrations as, among 1299 children from emigrational families, 1014 was placed in foster families and 285 remained in replacement institutions.

Without any doubt, labour migration brings a lot of negative effects, but we can also notice some positive consequences. In some families a rapid weakening of bonds, the increase in pathological behaviour and educational and behavioural issues do not occur. Children from migrational families see that the economic situation of their family is improving and their various needs are fulfilled more quickly. This consequently makes them feel more self-confident, accepted and more interesting for a peer group.

Table: Balance of losses and benefits resulting from the migration of a parent/parents

Losses	Benefits
the feeling of separation	the improvement of an economic situation
missing a family	access to various types of consumerist goods
stress caused by separation	faster and better fulfilment of needs
weaker emotional bonds with child/ spouse/family	feeling good as a "head of a family"
the decrease in the level of	the improvement of

parental control; more relaxed discipline	spousal/parental/family relations; better contact with neighbours and friends
educational and behavioural problems of a child	becoming an independent family (from grandparents; acquiring money for your own flat/house)
excessive number of household duties done by the remaining family members, including the under-aged	teaching children responsibility
weakening or disappearance of a role of a mother/father	taking on new social roles by each family member
the feeling of guilt, emptiness, loneliness	the opportunity of travelling together
looking for new partners	
divorce	
expenses related to managing at least two households	

Source: own data

Social assistance provided to migrational families on a local scale – conclusions

Regardless the cultural, historical and socio-economic context, a modern family still remains the fundamental element of the social structure and the functions it serves cannot be replaced. However, at the moment it is assumed that educational and social activities as well as the cooperation between a family and non-family institutions should complement each other.(Kawula,1998,p.165) A wide range of social assistance provided by social workers requires their vast knowledge, abilities, professional qualifications and experience in working with various types of families, which seems to be a difficult task.

The range of activities provided by social workers requires further educational and skill development. The changes, which are taking place in many spheres of a social life, have an impact on the character and type of social assistance and on new groups of addressees. In Poland, we are currently observing the increase in the number of temporarily single-parent families (migrational families) whose character and the functions served depend on a socio-economic situation of a given family.

We also need to look at a modern family as at a system. The concept of a family as a system first appeared in Polish literature after 1990 and it is still a valid paradigm of the social policy created to fulfil the needs of a family.(Kazubowska,2010,p.309) At present, the priority of the state policy towards a family is to recognize its superiority over various institutions and to maximize the

support by making use of the internal resources of a family. In the context of a new family type, i.e a migrational family, treating it as a system means that we are ready for a change and to look for new solutions to achieve an adequate state of every family member – the under-aged children and also parents staying abroad. Treating a family as a system makes it possible to look at their problems not only in the category of an individual but as at the complete dynamic structure created by all family members.

Thanks to this approach social assistance engages all family members in accordance with their capability of homeostasis, which is understood as a quest for a certain type of interior balance. This is necessary for migrational families where the risk of disintegration is considerably higher. Thanks to the capability of self-stabilization, the system of a family is characterized by the tendency to survive and to prevent crises.

Due to long-term separation, migrational families face numerous problems, which require institutional support provided by social assistance centres and their professional staff, i.e. social workers. The institutions offer professional social assistance, defined as professional activities, whose aim is to support people and families in strengthening or restoring the capability of functioning in a society by taking on adequate social roles.(Journal of Laws 2004) It seems that a variety of support activities, provided to this category of clients, is justified from the local perspective, in the cooperation of many social professionals. The local aspect of support and the commitment of local support institutions increase the effectiveness, feasibility and the establishment of closer relations between the under-aged and their families who remain in frequent contact with social workers.

Conclusions

Developing programs for eliminating unemployment (employment programs for young parents). Along with the promotion of employment of people 50+, the employment of young parents should also be promoted, as costs of their migration are the highest;

- 1) promoting those solutions among social workers, teachers, local authorities (the fundament of all projects are extensive and professional actions taken by social services);
- 2) undertaking multi-level actions by social workers to make potential emigrants aware that the period of separation should be limited (e.g. community interviews, cooperation with school, distribution of informative leaflets in big groups of emigrants, publishing information on numerous portals, forums and websites, e.g. of the Ministry of Foreign Affairs);
- 3) social education activities, i.e. educating parents about the possibility of taking their children with them (presenting the problem of emigration not in the

context of negative effects but in the context of specific solutions, e.g. by means of materials prepared by a professional team which include the most essential information about losses and benefits of long-term emigration, setting up the helpline for children and teenagers (no: 111 and 116);

- 4) - the cooperation of social workers with various institutions, especially school (social workers emphasize that the awareness and effectiveness of educational system institutions, in terms of individual support of a student, is too low. In fact, the majority of activities focus on the educational process only);
- 5) - activities focusing on providing support to people and families who come back from emigration (the priority of social assistance is to provide support to the entire family, not only to a child). Reintegration encompasses the entire family and the provided support should be interdisciplinary, i.e. it should include social, medical, legal, psychological, educational and economic support;
- 6) social assistance should not have a long-term character, as this may lead to becoming dependent on institutional support;
- 7) social assistance should concentrate on emphasizing strong points and on internal resources of a family;
- 8) all available methods and models should be used adequately to the needs and the character of the problem (*case work* - treating a family of an emigrant as an individual case, *group work* - treating a family of an emigrant as a specific group of support and as an element of the local and social network (community work));
- 9) giving advice of versatile character is especially important when providing social assistance (including family, legal and psychological aspects);
- 10) - it is postulated that social workers should be further introduced to the sphere of child care (first of all, social assistance should be provided to children with have no parental support. It requires field work, getting in direct contact and providing adequate support in a difficult situation. Also giving advice in specific cases and encouraging to accept support from other people and institutions).
- 11) providing support to children should include the development of social competence, i.e. assertiveness and the ability to cope in crisis situations, building self-esteem, which is often triggered due to separation. This type of support is most effective when provided in the form of group activities (games, trainings, fun activities);
- 12) -improving standards and the effectiveness of cooperation during crisis interventions;
- 13) -support activities should be directed in equal amount to children, parents and their environment (providing support to children should be accompanied by

actions towards the strengthening of the internal structure of a family and re-building bonds);

- 14) -extra activities of social assistance such as social and medical support (ad-hoc support, medical advice, medical check-ups, health promotion activities). Also the promulgation of education through culture (socio-cultural activities).

Moreover, social assistance provided to families who decide to emigrate and who face the difficulties caused by the separation, should concentrate on:

-the diagnosis of the situation of a client (the duration of emigration, the frequency and the quality of contacts, the scope of care provided to family members left behind, types of problems);

-informing parents about negative effects emigration and separation have on the development and upbringing of children;

-making parents aware about the necessity of assigning a legal guardian to children left behind;

-informing parents about the possibility of making use of the services provided by professional outreach institutions in case of problems with, e.g., provision of care, health problems or educational and behavioural problems of children;

-making parents, children and legal guardians aware of the possibility of making use of non-school support, e.g. the participation in socio-therapeutical activities available in day rooms.

Due to the variety of problems and a specific situation of each client, social assistance undertakes actions directed at: explaining, informing, persuading, controlling and creating new solutions to problems as well as providing support to both - individuals as well as groups. It is particularly visible in the development of activities and support plans available for migrational families which, due to emigration and separation, are dysfunctional in the sphere of functions and roles taken.

Regardless of the method and the model of social assistance, the activities, whose objective is to optimize the functioning of a family and its re-integration, aim to re-build autonomy and bonds as well as to improve spousal and parental relations in a family. Labour migrations have become a permanent element of a modern social reality with all its consequences, mainly negative ones in the form of long-term separation, longing and the breakdown of family relations. Therefore, apart from compensatory actions, suggested by various outreach institutions, it seems that there is a necessity for the interdisciplinary development of social assistance offer, its services and cooperation with the wide group of professionals on various levels of social life in the form of local activities provided on a large scale.

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HUBERT KOTARSKI

SOCIAL CAPITAL – AN ELEMENT OF THE CIVIL COMMUNITY STRUCTURE

Introduction

The concept of social capital has been, for a long time, thoroughly discussed in sociology, the organizational theory and economy, especially in the context of the new institutional economy. The introduction of the term “social capital” to sociology is related to the recognition of interpersonal relations as a potential and useful resource, which can be used by individuals or groups as a means for implementing various aims. The concept of social capital, next to the concept of human capital and cultural capital, is yet another complimentary element of the economic model, used for the explanation of various phenomena - both in the sphere of economy as well as in other fields of social life, including regional development. By taking interest in this issue, sociologists try to come up with factors that would help finding solutions to various problems of social groups, local communities and entire societies. It is assumed that social relations and networks of relations between individuals may be treated as the resource that helps gaining certain benefits (Kwiatkowski, 2005). Despite numerous studies on the subject, there is not one accurate definition of social capital (which is not the case with other terms used in social studies). The term “social capital” is defined in various ways, therefore, it is still ambiguous. The list of elements that comprise social capital is relatively long and the most important ones are: various interpersonal connections, trust, the desire of understanding, a set of common values and behaviour, social networks that lead to joint actions. Social capital is defined as everything which results in joint actions for common good in every field: economy, culture and politics.

An attempt to define and measure social capital

The concept of social capital has been one of the most frequently used theories in social studies in recent years. Alejandro Portes says that the term “social capital” has become the starting point for the formulation of one of the most popular sociological theories introduced to everyday language in recent years (Portes, 1998, p. 2). With the popularity of the social capital

theory, there has been an occurrence of its various definitions. It is said that Bourdieu, Coleman and Putnam played a particularly important role in the development of the theory. According to Pierre Bourdieu social capital is “a sum of current and potential resources which are linked to possession of a network of lasting relations, of more or less institutionalised shared acknowledgement and recognition. In other words, it is the sum of capital and power which can be stimulated by the network” (Bourdieu and Wacquant, Loïc J. D., 2001, p. 105). According to this definition, making use of the potential of social capital resources by individuals, depends on the access and outreach of networks of relations in which they take part. According to Bourdieu, the exploitation of the resources depends on individual actions taken by people and their capability and ability to develop social capital that was provided to them. The author of the second important concept of social capital is James Coleman. His classic concept defines social capital in a comprehensive and methodical way and it is understood as economic perspective (the rational action theory) (Trutkowski and Mandes, 2005). Coleman defined social capital as “the ability of people to work together for common purposes in groups and organizations” (Fukuyama, 1997, p. 20). The author of the third concept is Robert Putman. He is regarded as the main inspirer and exponent of social capital. According to Putman “social capital is comprised of such features of social life in a given society as networks, norms and trust – those features allow the members of a given society to enhance the effectiveness of joint actions and skilful achievement of shared aims” (Putnam et al., 1995, p. 56). It is worth noticing that Putman’s observations of social capital were made in Italy and were based on the example of the functioning of Italian regions and the extent to which they are developed. However, it is widely believed that the widespread interest in social capital has its true beginning in the theoretical systematisation of the term by four authors: Pierre Bourdieu, James Coleman, Robert Putnam and Francis Fukuyama.

Social capital of the population of Podkarpackie province

On the basis of the measures and indicators used in the research, we can pinpoint three elementary dimensions – elements of social capital, to which there is almost full agreement. Those aspects were used in the

research whose results are presented in this article (Kotarski, 2013). Those three elements of social capital are:

- Affiliation with various organizations
- Trust
- Social networks

Affiliation with various organizations

The participation of citizens in public life is associated with the term “citizenship”, which relates to yet another term – a civil society. The tradition of the participation of citizens in social life has ancient roots described, among others, by Aristotle who thought that a citizen is every man who has the right to unlimited participation in power (Aristoteles, 2001, p. 77). At present, the nature of participation of citizens in a public life of a democratic society has changed. It seems that, as a fundamental cognitive aspect, the unlimited participation of citizens in power has been replaced by the readiness and ability of making use of this possibility.

Civil activity has been an area of interest of many researchers and theorists of the idea of a civil society. Among the features of a civil society there are certain patterns of civil behaviour, including: systems of values, the identity of an individual, the activity of an individual, social commitment, the accomplishment of common aspirations, a sense of having relations within a group, the capability of self-organization and self-government, creativity and the rationalism of actions or, so called, social virtues, i.e. the readiness to think and act in the interest of other people and institutions (Gliński, 1999, pp. 116–117).

Civil activity is regarded by many researchers as one of the fundamentals of a civil society. Some of them think that it is the essence of a civil society and they often define it as, e.g., general social activity in a public space, which is not controlled by the state (Bobbio, 1997, p. 63). According to Jerzy Szacki, researchers – empiricists treat a civil society as the third sector (Szacki, 1997, p. 54).

The existence of voluntary associations and the affiliation with them is treated by theorists as a useful barometer of social commitment. The benefits of associations were described by Alexis de Tocqueville who, by giving an example of an American society, stated that “Americans of all ages, all conditions, all minds constantly unite. Not only do they have commercial

and industrial associations in which all take part, but they also have a thousand other kinds: religious, moral, grave, futile, very general and very particular, immense and very small [...]. Thus the most democratic country on earth is found to be, above all, the one where men in our day have most perfected the art of pursuing the object of their common desires in common and have applied this new science to the most objects” (Tocqueville, 1996, p. 116). Robert Putman also states that civil associations contribute to the effectiveness and stability of a democratic government, as they affect each member “internally” and broader circles of a society “externally”. Internally, associations develop a habit of cooperation, stability and a tendency to think about social issues. Externally, a dense network of secondary relations enhances, what is called by political scientists, “the articulation of interests” and “the aggregation of interests” (Putnam et al., 1995, p. 137).

For the majority of theorists affiliation with various institutions, together with social capital, are two fundamental elements of a civil society and, surely, of a society that is undergoing successful development (Czapiński and Panek, 2007, p. 257).

The participation of the population of Podkarpackie province in the activities of one of the official social organizations (associations) may be treated as formal social capital. The research employed a very broad definition of the term “social organization”. The respondents were asked whether they had ever belonged to:

- an association, a social, political or self-support organization, a charity
 - a trade union, voluntary service (e.g. fire brigade)
 - a residential block committee, a condominium property board
 - representation of parents in the class, a school council, a parent council
 - a church group, a religious group/community (e.g. a rosary group etc.)
 - a sports club, a music group, a hobby group.

The aim of the question was to establish the fact of affiliation with any formal structure of a non-profit voluntary association. The research showed that nearly 1/3 of the respondents declared the affiliation with at least one of the listed social organizations (28.1%). The citizens of the Krosno and Przemysl sub-region were characterised with a higher level of participation

in activities organized by official social organizations. Such declaration was made by 30.7% of the respondents. In the Rzeszow and Tarnobrzeg sub-region the number was as high as 27.7%. The most active respondent declared the affiliation with five social organizations. Four respondents declared the affiliation with four organizations, three respondents with eight organizations and fifty four respondents with two organizations. The residents of rural areas were characterised with a slightly higher level of affiliation with social organizations (30%), when compared to the city dwellers (27.8%). The residents of rural areas were more often affiliated with trade unions, fire brigades, church groups and religious communities, whereas the city dwellers were more often affiliated with residential block committees, condominium property boards as well as sports clubs, music groups and hobby groups.

Factors, which differentiated the type of formalized social capital among the population of Podkarpackie province, turned out to be: sex, age, level of education, professional status and the level of religiousness, measured by the frequency of religious practice.

Over 1/4 of the most active respondents, who saw other members at least once a month and organized activities for them, were affiliated with a church group, religious group or community or a sports club, music group or hobby group (26.3% of the total number of respondents claimed *that they see other members at least once a month and they organize the activities for other people*). Every fifth respondent, that was engaged in the activities of social organizations to the greatest extent, was affiliated with trade unions or voluntary fire service, e.g. fire brigade (18.6%).

The majority of the respondents, who regularly take part in meetings organized by social organizations, but who do not organize any activities, were affiliated with sports clubs, music groups and hobby groups (31.4% of the respondents claimed that *they see other members at least once a month but they do not organize activities for other people*) as well as church groups and religious groups and communities (25.7%). Irregular or passive participation in meetings characterized the respondents who were affiliated with three types of institutions: trade unions and voluntary services (27.4% of the total number of respondents claimed that *they see other members less frequently than once a month but they do not organize activities for other people*), representation of parents in the class, school councils and parent

councils (24.2%) and associations, social, political and self-support organizations and charities (21%). The symbolic affiliation with any association, which often involves paying member fees or being listed as a formal member of an organization, was chosen by members of trade unions and voluntary service (36.7% of the total number of respondents claimed that *they do not see other members or they see them very rarely and their membership mainly comes down to paying a member fee or being listed as a formal member of an organization*). In conclusion, the research on the level of affiliation with social organizations of the population of Podkarpackie province revealed the domination of the active forms of participation. Nearly 1/3 of the respondents see other members regularly (once a month) and they initiate new activities. Every fifth respondent does not take part in meetings regularly, but when they do participate they actively engage in the activities and initiate new ideas.

Social trust

Social trust is a fundamental element of social capital and one of its most precious varieties (Sztompka, 2007, p. 244). For many theorists, trust is a crucial category and value and its occurrence indicates a high level of social capital (Szawiel, 2006). As Andrzej Sadowski emphasises, a high level of social trust in a family and during the establishment of voluntary institutions and social organizations prepares citizens to undertake actions to achieve certain goals. Robert Putman, one of the populariser of the term “social capital”, noticed that there is a relation between social capital and trust. He defined social capital as “features of social organization, such as trust, norms, and networks, that can improve the efficiency of society by facilitating coordinated actions” (Sadowski, 2006, p. 93). Putman strongly believed that “trust is a fundamental element of social capital” (Putnam et al., 1995, p. 264). Trust is the result of the positive experience of social cooperation and the possibility to promote knowledge about it among others. Therefore, what is important for the level of social capital is the creation of opportunities for community members to transmit this type of information (Lewenstein, 2006, p. 165).

Literature on the empiric indicators of social capital and its component, i.e. social trust, is rich in techniques used to estimate the outreach of the phenomenon. The table below presents only two dimensions of social trust

chosen for the analysis. They constitute the detailed empiric variable components of social trust:

- the level of trust towards neighbours
- the level of trust towards people in general (general level of trust).

The research showed that only 15% of the population of Podkarpackie province have trust towards their neighbours and is ready to ask them to keep their keys or to borrow something (15.4% of all respondents). Every fifth respondent (22.2%) admits to use neighbourly help based on trust a few times a year. Over 1/3 of the respondents (34.3%) admit that they do it sporadically (once a year). Over 1/4 of the respondents (26.1%) have no trust towards their neighbours and they do not ask them to keep their keys or for a loan. Only 12% of the respondents (12.7%) agreed with the statement that most neighbours may be trusted. The number of the negative answers to this question (*rather not and definitely not*) was higher and amounted to 19.3%. Over half of the respondents would be willing to trust most of their neighbours (54.9%). Adding up the number of the respondents who fully and conditionally trust their neighbours, we come up with the group of respondents who are willing to ask their neighbours for help or to take care of their personal valuables.

We arrive with the similar distribution of the answers to the question which directly measures the level of trust that the neighbours have towards the respondents. The respondents were asked whether their neighbours are ready to ask them for help. 16% of the respondents strongly negated such a statement. Nearly half of the respondents answered that they do not have such neighbours (49.8%). Only nearly 3% of the respondents were sure that there were neighbours who would like to make use of them (2.9%). 13% said that they might have neighbours like that.

To measure the level of social trust the most frequently used indicator in the empiric research is the general social trust indicator (question: *Can you trust the majority of people?*). In the research on social capital of Podkarpackie province the general social trust indicator was used in two questions. The aim of the double use of the indicator was to diagnose, in the best way possible, the level of social trust among the population of Podkarpackie province. In both cases the level of general social trust remained on a similar level.

Table 1. The level of general social trust of the population of Podkarpackie province

Please state which opinion is closest to your views:		Please state whether you agree with the following statements:	
Generally speaking we can trust the majority of people	8.8	Majority of people can be trusted	6.5
We have to be very careful when it comes to relations with other people	0.4	You should always be very careful when it comes to relations with other people	3.3
It's difficult to say	0.9	It's difficult to say	0.2
Total	100.0	Total	100.0

Source: own data

Social Networks

Among the researchers working on the problem of social capital, there are subtle differences in what they think is a fundament of social capital. However, there is no doubt that the common structural element of social capital for all of them is a social network (Lewenstein, 2006, p. 166).

When defining social capital, many authors refer to social networks. Among them there are: James Coleman, Robert Putnam, Mark Granovetter, Ronald S. Burt and Nan Lin.

James Coleman emphasises the fact that every type of social structure creates some form of social capital. However, certain types of structures are regarded as particularly important in this process. The condition that is necessary, but not sufficient, for the norms to work properly is behaviour which "imposes external actions on others". Many types of structures, that comply with this condition, do not have such norms. According to Coleman the reason for this is the lack of "closed social structures". Only this type of structure allows mutual sanctions of behaviour between all participants in social actions, which leads to the development of trust based on the compliance with general rules. Only the closed structure creates solidarity in a social structure. Closed networks are characterised by the relations between

all elements of the structure, which ensure direct and the fastest possible contact between any network nodes (Niesporek, 2008, pp. 24–25). Marc Granovetter also emphasised the importance of weak bonds and specific relations (*bridges between networks*), which enhance a better stream of information and allow better mobilization of resources of social relations for individual benefits as well as public good (Lewenstein, 2006, p. 167).

We can notice that numerous theoretical discussions assign the power to enhance social development to social networks. This is also confirmed by social research and social practice. Barbara Lewenstein says it is believed that, in a modern concept of the local development, one of the primary resources facilitating the development of the system is institutionalised social networks. They are created around local institutions, especially non-governmental organizations, social groups and community members. They “crystallise” a local community and create more opportunities for a group communication, self-organization and the mobilization of means used to solve problems (Lewenstein, 2006, p. 167).

The practitioners, who work on the activation of local communities by making use of the results of the analysis of the significance of social networks, also claim that “the probability of being successful in establishing of an organization increases if the members and potential participants are <<well-connected>> (understood as strong, positive relations within an organization) and that a given network has good relations with institutions of greater power. Those institutions provide access to the resources, professional knowledge and influence, which may help in achieving goals” (Gilchrist, 2001, p. 28).

The vast majority of the respondents have families in, as well as outside, their current place of residence. Eight out of ten respondents have families who live in their current place of residence. Over 90% of the respondents have family members who live in another city. The respondents stay in a close contact with the closest family, siblings and parents, by organizing gatherings for family members who live in the same town. From the family who the analysis of the frequency of contacts between the respondents and the members of their families who live in and outside their current place of residence, seems to be interesting from the point of view of the development of social capital. To make the analysis easier the family members have been divided into two groups: close and extended family. The

close family include: mother, father, brother, sister, son, daughter, grandfather and grandmother. The extended family include: uncle, aunt, cousin, father-in-law, mother-in-law, sister-in-law, brother-in-law. Within the close family the respondents see parents a few times a week (mother 33.2%, father 21.9%) and siblings (sister 30.2%, brother 22.5%). Once a week they see their siblings (sister 27.1%, brother 27.3%) and less frequently - their parents. The population of Podkarpackie province visit their grandparents and siblings once or twice a month.

Conclusions

The research proved that the population of Podkarpackie province is characterised with the high level of social capital. However, it is diversified territorially. The level of social capital shows that Podkarpackie province belongs to the regions with the above-average level of the social capital resources: the level of general trust of the community members is nearly three times higher than the average of Poland (the level of general trust in the Social Diagnosis reached 10.5% in 2007, in the research - 26.5%). The level of civil activity and the affiliation with social organizations is nearly twice as high as the average of Poland. The research also showed that the population of Podkarpackie province is characterised with the high level of affiliation with social organizations. Nearly 30% of the respondents declared the affiliation with one of the local social organizations.

The scope of the use of social capital in the mechanism of the functioning of social and economic life is not evenly distributed in the region and its development. It is related to the socio-demographic features of the community members, which influence the social capital resources. The high level of the synthetic measure of the indexes of each dimension of social capital was related to: age, the level of education, professional status, the level of civil commitment and the level of religious activity. The factors, which differentiate the formalized social capital of the population of Podkarpackie province, turned out to be: sex, age, education, professional status, the level of religiousness, measured by the frequency of religious practice.

The research revealed the existence of an important interdependence – the lower the level of social trust, the lower interest and willingness to get engaged in the problems of a local community. The factor, that differentiates

the level of civil commitment and the willingness to cooperate, again turned out to be age: the respondents aged between 35-44 and 15-24 showed the lowest level of commitment in the issues of "little homeland" (39.9% and 41.0% respectively). The respondents aged between 45-54 and 55+ showed the highest level of civil commitment. Over half of them was ready to actively get engaged for the common good (54.8% and 52%).

The diagnosis and the explanation of the level of social capital in Podkarpackie province allows to pinpoint the resources which may affect the important areas for the regional development. The results of the empiric research prove that social capital is the resource which brings specific benefits to individuals as well as local and regional communities. Using social capital in the research on the regional development is an important benefit, as it gives the possibility to design regional policy that, to a greater extent, fulfils the real needs of community members. This may be achieved by taking actions in the area of education, labour market and decentralization of local policy. The possibility of the better use of the social capital resources should become an objective of local policy. Florian Znaniecki says that we need to activate hidden social energy that lies deep in community members. Various institutional units, social organizations as well as private persons that are involved in the process of local community management will contribute to more efficient and effective functioning of a local community. This will also result in rebuilding social trust within local communities.

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JAROSŁAW KINAL, MARIOLA KINAL

**CROWDSOURCING (AS A PART OF THE INFORMATION SOCIETY)
AND LOCAL DEVELOPMENT. THE ANALYSIS OF THE ACTIVITIES
ASSOCIATED WITH THE INTRODUCTION OF CIVIL BUDGET OF
RZESZOW IN 2014-2015.**

Introduction

Social acceptance for new solutions in the field of information and communication technologies today is at a very high level, so it is possible to implement interactive social solutions for micro and macro levels of interpersonal communication as well as the utilization of the known comunicological processes for creating and activating social circles and initiating action and consultation (Wasko, Faraj 2000).

Contemporary social-comunicological processes of the Internet space have been enriched by the spatial element which is called in the English literature "Buzzworld". It is a model that allows virtual space not only making friends but also to use social networks to generate and acquire content. One of the elements of space "buzz" is crowdsourcing. It is a model that uses the phenomenon of collective intelligence³¹. In this model, institutions and organizations use the expertise of its members to create, test and to obtain feedback on the products and services they produce and the services provided. This model is similar to the principles of the social media that allow the forming of relationships and interpersonal interactions. Crowdsourcing uses the phenomenon of networking relationships to build and control knowledge of the group and use of this resource for their own commercial goals as well (Barbham 2009).

Definition of the Information Society

The author of the term information society is Tadlo Umesao who first used it in 1963 in an article on the evaluation theory of society based on "information industry". Then the term was popularized by Kenichi Koyama in the trial called "Introduction to information theory", published in Japanese in 1968 (Nowak 2007). Currently, there are many definitions of the information society and the common feature is the information and its use. In most definitions are contained phrases about the information society as a society that uses computers and various types of equipment related to digital technology. However, it is believed

³¹ Also known as the intelligence of the crowd

that it is still lacking in this matter legible and understandable conceptual apparatus and terminology. This is probably because it is a complex concept that is still created. On his determination often also have some influence short-term interests (political, economic and scientific) of author's definition (Nowak 2007).

When analyzing the subject literature, it is difficult to determine the beginning of the era of the information society. In the literature, one can find plenty to offer: the invention of the first computer, the Internet and the creation of the domination of the economy by the services sector.

In the polish documents exist, the following definitions of the concept of information society.

"Information Society is a new type of social organization that formed in the countries in which the development of modern ICT applications has reached a high level" (Government Projects in Poland - Information Society, 2006).

"Information society has not only developed measures of information processing and communication, but these measures are the basis of national income and provide livelihoods of most of society" (Goban-Klas, Sienkiewicz, 1999: 78).

In addition to the definitions indicated above, the literature uses the following definition: *"It means a socio-economic formation, in which the productive use of the resource, which is the information and intensive in terms of knowledge production, play a dominant role"* (Kubicek, 1999).

Key features of the information society constitute a "set of interrelationships between information technology sector and the changes in economic structures and policies of individual countries and international organizations as well as the objectives of the various interest groups (from manufacturers of computer equipment through a newly created virtual communities to local communities and groups defending themselves against entrusted with the changes)" (Golinski 2002: 112).

As indicated by D. Walewska and I. Sikorska (2008), in such a society:

- (1) *the information and the resulting knowledge and inventions are a fundamental element of human creativity and the development of a comprehensive stimulus using ICT;*
- (2) *the labor force consists mostly of information workers*
- (3) *the majority of the gross national income of developed countries formed within the economy based on the achievement of new ICT technologies* (Walewska, Sikorska, 2008: 13).

Social development theory explains the information society as the next stage of social development, after the industrial society (Goban-Klas 2002). The *information society* is also referred to as *post-modern* or *post-industrial society*.

From the point of view of the social division of labor, the information society is called a community in which more than 50% of the active labor force is employed in the processing of information. D. Bell defined premodern human work as a game between man and nature, modern man as a game between man and nature inanimate and human postmodern work as a game between people (Goban-Klas 1999). The characteristics of such a society are:

- (1) highly developed service sector, especially modern service sector (banking, finance, telecommunications, information technology, research and development and management); in some countries this sector operates over 80% of the economically active wherein the service sector traditional slightly above 10%;
- (2) knowledge-based economy;
- (3) a high level of public school enrollment;
- (4) the level of functional literacy in society;
- (5) the progressive process of decentralization of the public;
- (6) the revival of the local community;
- (7) the diversification of social life (Golinski 2002).

Golinski M. (2002) defines the characteristics of the information society included in Table 1.

Table 1. Characteristics of the information society

Lp.	Features related to the structure of the state	Characteristics associated with the development of citizens
1.	highly developed service sector	a high level of public schooling
2.	knowledge-based economy	the growing importance of professionals and researchers in the occupational structure
3.	size of the information flows	renaissance of the local community
4.	progressive process of decentralization of the state	more active citizens in local affairs
5.	development of banking, finance, telecommunications, information technology and management	facilities for citizens

Source: Report of the European Commission, 1994: *Europe and the global information society*.

Extensions of theory of the information society are two phenomena: the knowledge society and the media society.

In a society of knowledge, social development is dependent on academic merit, their distribution through educational systems, the popularization of the use of modern information and communication technologies by the community (Kulpińska, 2008: 27). It can therefore be assumed that the knowledge society combines two concepts: the information society and knowledge-based economy (Kaposzta, Nagy 2015). A man living in a knowledge society must be mobile and actively navigate through the stream of information coming to him. Member of the knowledge society should have the skills associated with the acquisition of information and the selection between the information useful and worthless. This is due to the tendency to universal access to information resources, but despite the fact that the information reaches the most people in the world, this knowledge is still a privilege of the few. Such a society is also noticeable significant social stratification caused differentiated access to modern techniques and skills to use them.

The term *social media* is defined in the literature as a phenomenon in which *the network and information, form and content, are linked by a chain of relationships. However, changing the phases. It is a new phase of their development, both network and information united by the concept of the medium gives beginning of a new formation* (Goban-Klas, 2007: 40). According to this theory, this society combines three elements: the medium (technical factor), knowledge (information agent) and network (social factor). As indicated Kalnac N. (2006), contemporary social stratification _ associated with access to information, is an important sociological problem. Stanislaw Michalczyk (2008: 32), describing the public media, notes the convergence of forms of traditional media and new media. Such interpenetration is also changing the form of daily media activity significant part of the population.

The definition of crowdsourcing and its relation to the theory of social networks

The authors of the original definition of crowdsourcing are Jeff Howe and Mark Robinson, who in Wired magazine presented a new business model based on network consumers.:

Basically crowdsourcing means acting company or institution that has such a task, or a portion thereof, previously performed by employees undefined (and generally large) network of people, in the form of an open call. This action may take the form of peer-production (when the job is done collectively) or individual actions. The advantages of this action is to work in an open connection model and a large network of potential employees (Howe 2006).

An additional element, as indicated by T. Kalata (2013) is the difference between crowdsourcing and outsourcing:

The difference to the outsourcing technique lies in the fact that the task is entrusted to an unknown group as a public appeal, and not to some particular subject. Crowdsourcing, thanks to Web technology, 2.0 is considered as a tool of the big prospects as in the case of commercial organizations and non-profit organizations, which are libraries and archives. The most famous example of using crowdsourcing techniques is Wikipedia, which is digital, accessible encyclopedia, created by online volunteers. This project is in a very short time and at minimal cost led to the creation of nearly 4 million articles in the case of the English version.

As indicated B.Brzozowski (2013) on his blog, has changed the core of term crowdsourcing:

Transforming itself into action, becoming almost synonymous with the word "collaboration". Referring to the "new" meaning of the term, we can easily distinguish a narrow and a broad definition of crowdsourcing. As a wide crowdsourcing is a collective sharing of information (any type of information, including own tastes); in the narrow sense - sharing professional knowledge.

An important element of crowdsourcing is the use of social network theory, in which the behavior of the actor in the public sphere is interpreted in accordance with certain models of relations, associations both interactive and structural, with particular emphasis on Durkheim's principle of solidarity. In the case of crowdsourcing and more generally in the process of online interaction is important to use the paradigm of *Kin Universe*. He says about that:

Each person can say they have the social universe that is made up of people with whom it has more than a purely physical contact (physical contact is, for example. With the people on the bus or train) - talking with them, work with them and come them into the conflict. A lot of social contacts is a temporary and peripherals - people with whom we contact in this way can be found on the outskirts of the social universe. (Stanisz 2012).

In the context of this theory Crowdsourcing range of activities in the nomenclature social group can be both broad and very accurate. People who feel a bond with the institution, personalize it, and give it a personal nature - which increases the degree of intimacy and openness in the process of interaction between them. In addition, as indicated by Charles van den Heuvel in the age of online social interaction social distance becomes blurred and the level of activity, calculated undertaken initiatives, network users is much larger than in the real world. Therefore, institutions and organizations creating social networks using

crowdsourcing models can count on a much higher level of feedback than similar measures had invested in the acquisition of *knowledge from the crowd* in the real world.

This is also related to the creation of a specific social organization namely knowledge society. This is the type of society in which the knowledge determines the professional and social position and is the most valuable commodity in the modern economy. In a society of knowledge each employee brings to the company a major part of their workshop, which is to his knowledge. This part of the workshop is often far more valuable than material derived from the part of the employer and employee workshop takes with him when he changes jobs. If the employer can lead to dependence on employee, if the employee to reduce the efficiency due to the certainty of employment. Some elements of crowdsourcing based on the use of knowledge anonymous crowd can help increase the efficiency of employees, according to the rules of competition.

In the case of a discussion of the forms of organization should also mention the information society as a social organization in which its members have the preparation and the ability to use information systems, computerizing and using telecommunications services to transfer and remote processing.

Fields of exploitation Crowdsourcing

Crowdsourcing as a model of information retrieval can be used in three fields of exploitation companies and institutions: customer service, product development and implementation, and probing the market. The first element of the acquisition of knowledge about the effectiveness of employees allows employers efficient selection and points to areas in which to apply different techniques for managing staff and resources of the company. In the latter case, the information derived from the crowd enable to improve the product at every stage of its life. The last element in a way that enables the capture of low or costless information about the market, its niches and demand position. There is no need to have tests to outside companies. Crowdsourcing solutions enable slightly research team analysis of the current situation and trends on the basis of a lot of research, but with the proviso that these groups often do not have adequate statistical representativeness.

The definition and the realities of implementation of the civic budget in Rzeszów in the years 2014-2015

The term "participatory budgeting" (civic budget) is referred to the process discussion and decision-making in a democratic society in which every resident of the city has an impact on distributions the part of the city or the public funds budget. In making their decisions for the most important elements are (1) understanding the priorities of the issuance of money by the same members of the community, (2)

selection of budget delegates representing local communities, technical support from city councilors (local level), (3) local and regional assemblies to debate and vote on spending priorities, and (4) implementation of the ideas that have direct impact on the quality of life.

The research and the practice of cities benefiting from this form of participatory democracy shows that it results in a higher quality of life, increased satisfaction with public services, more transparency and credibility of public authorities, greater participation in public life (especially people who are excluded), as well as civic education.

Rzeszow – a city in south-eastern Poland, populated by two hundred thousand inhabitants, decided to implement the idea of participatory budgeting in 2014. In the first year of this project included 10 projects of local initiatives selected in an online vote with a value of 5 102 500 PLN (1 204 726.83 EUR).³²

Among the initiatives taken to implement the investments were included in Table 2.

Table 2. Investments adopted for implementation within the Civil Budget Rzeszow 2014

L p	Task name	Vote	Amount of the the grant (PLN)
1	Scene amphitheater at the Krakowska-Południe district - South as part of the investment under the name "Development of green areas on the Krakowska – South district"	3 286	600 000
2	Park located near the Bl. Carolina street.	2 613	1 200 000
3	The device of recreational areas including a playground between Odrzykonska, Biecka, Iwonicka and Nowosadecka street.	2 600	830 000
4	"Street Workout The park" Boulevards Rzeszow.	2 290	32 500
5	Pneumatic roofing skatepark in Rzeszow	2 268	800 000
6	Construction of a recreational area with a playground for Biala district in Rzeszow	2 137	640 000
7	Implementation of a football field with grass surface at Rymanowska street with accessories and fence	2 036	180 000
8	Implementation of the asphalt overlay with adjustable roadsides and execution of pavement for Wyzwolenia street	1 781	200 000

³² As at 31.12.2014

9	Land development at the Complex of General Education Schools No. 4 for the purpose of recreation square to children and young people with the implementation of pedestrian areas.	1 756	200 000
10	Repair and modernization of sports fields belonging to the Complex of General Education Schools No. 4 in Rzeszow	1 564	420 000

Source: Office of the City of Rzeszów

From table 2. it can be concluded that the inhabitants of Rzeszow strongly supported recreational projects of the nature of hard investment. A certain astonishment raised the fact that the most popular design won only 3286 votes, which, combined with the number of 187,000 inhabitants of Rzeszów is 1.75% of the population of the city. Total votes did not exceed 35,000, that is 18.7% of the population of Rzeszow took part in this form of civic participation.

In 2015, city authorities decided to change the rules of participation - split into hard projects (investment) - which received 6 million PLN - and soft (social) - which accounts for 0.5 million PLN. In the context of hard projects won papal park revitalization project, which took home 97% of the budget allocated for this purpose. The idea of the papal park revitalization, and the construction of the fountain at this point involved Catholic Church, associations and institutions linked to it. As a consequence, this idea has collected 3933 votes ahead of the construction of the amphitheater and the scene surrounding, the children's playground and gym on the Krakowska – South district. On revitalization Krakowska-Poludnie district project, the cost of which was estimated at 1.2 million PLN, 2928 people voted. Therefore, the winning project has collected most of the available resources in Rzeszów Citizens Budget decision on a second project must be approved by the rulers of the city. As part of the implementation of the soft projects allocated to: (1) concert One heart, one spirit, (2) Art Festival - Carpathia Festival, (3) educational and health package for pensioners, (4) the design of specialist support for children with special needs education and development, and (5) the project "Meetings with photography." For these projects allocated 494 000 PLN. Interesting is the fact that the last of the selected projects only need 183 votes to qualifications. There may be a greater involvement of the residents of Rzeszow in investment projects than in social projects. Equally interesting is the fact, reduce the interest inhabitants civil budget. In 2015, all RCB projects won 21 730 votes. This is much less than in the first edition. Then the votes were 35 thousand. After the final counting of votes decreased the number of invalid votes. Initially, there were 3 155. Finally, there were 2,727. Of the total of 21 730, only 1171 votes were acquired through online voting. The remaining votes were submitted through traditional means, in units and

representative of the City Hall. (Only one investment project for the implementation of the 2015 RCB?)

Conclusion

The idea of crowdsourcing implementation to the activities of e-government is an essential part of the formation of civil society. Initial difficulties associated with low voter turnout may not result in the rejection of this form to express their opinion by locals. Perhaps an increase in advertising pressure on the ability to vote without leaving home, encourage residents to become more involved in co-investment by the city and the rulers of the city to a higher number of urban initiatives consult electronically.

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KRZYSZTOF MALICKI

THE ROLE OF THE PAST AND COLLECTIVE MEMORY IN THE REGIONAL POLICY AND LOCAL DEVELOPMENT

The problem of the past and history does not take much space in the discussion about various aspects of the local development. When it does finally appear in the discourse, the references to the past most often relate to the necessity of the cultural legacy preservation in the process of modernization or they treat history as potential capital that can be used to increase the number of tourist attractions. This situation is somehow understandable. In the discussion about the local development we, first of all, consider the economic aspect, which ensures better economic situation, safety and the possibility of the versatile development of local communities. Taking into account any “historical element” in the process of working on the local development strategy doesn’t seem to be an important aspect.

When it does finally occur, the contact with history and the past may take various forms. Two of them seem to be the most common and are undoubtedly appreciated and frequently used by political and economic decision makers of numerous local institutions. The first situation takes place when local communities make an attempt to find various historical traditions or even artificially create their doubtful genealogy (they often do so in an unprofessional way and against historical facts and assumptions). It is very frequently related to the process of branding and the promotion of local authorities for whom tradition and legacy have always played an important role. Such actions derive from the need of having historical roots. This need is deeply rooted in the awareness of individuals and social groups, which proves that history should be taken into consideration when it comes to modern actions towards the development of local communities. The second situation is expressed by, e.g. the conflict of interest: what is an obstacle in the development of an important communicational investment (e.g. an area of archaeological excavations, a place related to a historical event, the existence of a monument or a memorial site) may, in time, become an important element of the local strategy for presenting a community as being sensitive towards the past, proud of their legacy and deeply rooted in history. Therefore, the past may become a barrier to the process of the development, but it can also become an asset, a stimulator for such development.

Therefore, including an element of history and the memory of the past in modern processes of the local development is a process full of compromises, where potential benefits may become visible only in a long-term run.

These are just a few examples of situations in which the past meets the present, forcing local communities and their leaders to confront an old and, as it would seem, irrelevant problem of the past and history. They show that the extent to which an image of the past is altered according to the needs of a given community, is quite considerable. However, that is not always possible. In some situations the past lives in the awareness of modern social groups which significantly affects modern political decisions. In such case, the change in attitudes towards the past is very difficult and the history is visible indirectly through the collective memory of a given local community. This text will present such situations.

What we understand here as the past and history is very often reflected by the collective memory of a local community. The term “collective memory” has numerous meanings, however for the purpose of this text we will understand it as “a set of ideas about the past of a given group as well as all people and events of that past that are remembered in various ways. It also concerns various forms of commemoration” (Szacka 2000). Therefore, collective memory is comprised of two important elements: the idea about the past of a given group and the commemoration of that past (the relation between those two elements seems to be far more complex, as both elements undoubtedly condition each other). What is especially important is the fact that there is not one collective memory. There is an infinite number of them and every social group (a family, a local or ethnic community and even the nation) has “their own” memory (Halbwachs 1969). The coexistence of those memories is not always conflict-free. Often, within one group, there is an occurrence of a conflict between certain ideas about the past. Such a situation requires choosing one of the standpoints, as collective memory doesn’t like ambivalence.

Collective memory should not be confused with history which is understood as a professional field of study. In the discussion about the differences between both terms, two elements - “the objectivity” of history and “the subjectivity” of collective memory are frequently emphasized. Contrary to collective memory, history is critical, reflexive, full of ambiguity, distancing itself from the perspective of an individual. “Heroic narration”, characteristic for collective memory, is not present here, either (Wertsch 2002). However, it doesn’t mean that the memory and history should be regarded as separate categories for research and that there are no points of connection between them. According to B. Szacka, they remind Weber’s “ideal types”, which very rarely occur in their pure form. To some extent, they remind two opposites with the abundance of various visions of the past in between (Szacka 2006). Every attempt to analyse the past makes us move between those two opposites. This means that acquiring “knowledge” about the past of a given society is not enough. We should also study vernacular concepts, myths which are often totally inconsistent with the historical facts.

Coming to an end of the discussion about the definition of social capital, we should also take into consideration the significance of time in which similar ideas have started to be analysed to such an extent for the first time ever. The end of the 20th and the beginning of the 21st century resulted in an unexpected comeback of the interest taken in the issues related to the memory on the national and regional scale as well as on the level of a local community. The reasons for such a phenomenon (P. Nora described it as “the age of commemoration”) are rooted in the civilizational phenomena of the last 25 years, i.e. uncertainty of the future, common democratization (also the democratization of history) as well as the escalation of public opposition movements, which aim at “the revenge of the memory” (Żakowski 2002). The problems related to the memory have entered the scene of big social processes in the form of conflicts about the past and attempts to coming to terms with it. The paradox of that situation is even bigger as the interest taken in collective memory has become stronger in one of the most stable periods of the European history, in times when “the end of history” has already been proclaimed many times.

Central and Eastern Europe, especially post-communist countries, takes a special place on the map of the arguments over the memory. These days, conflicts about the past are one of the main elements of a public debate in those countries and they are the reason for the serious political disputes. It derives from the fact that for nearly 50 years the memory (at least in public space) was entirely controlled and regulated by the state. The manipulation of the past was a phenomenon frequently occurring in the communist system, which aimed at creating a new man. Distorting the school curriculum, destroying memorials, which were inconvenient for the communist ideology, or removing many historical facts from a public debate – these are just a few facts about the reality of Central and Eastern Europe between 1944-1989. However, what was officially forbidden, was deeply rooted in the alternative collective memory. Things that weren't taught to children at school, were frequently discussed at home. That way, despite the communist repression and the official political lies, the truth about many facts of the past prevailed.

It was only in 1989 that the open debate over the areas of history regulated by the state, was possible. It led to „the thaw” of the debate over the issues that had been, until then, forbidden. This process brought positive results very quickly. It revealed divisions and latent resentments which would, sooner or later, result in serious conflicts.

In the first years after 1989, the idea of the development of a new democratic society through „the escape from the memory” and through focusing on the processes of modernization of economy and main political institutions seemed to be possible. However, it quickly turned out that such assumption was incorrect. One after another, the communities in Poland, Romania, Hungary, Czech Republic and

Slovakia were facing crises which resulted from the arguments over the memory and the depiction of the past. The main problems related to: an unsettled communist activity of many popular actors, reoccurring nationalist resentments, the necessity to face the memory of Jewish communities mass-murdered in Shoah (very often with the cooperation of their neighbours), coming to terms with the communist crimes. Although these examples present the main issues, this is not a full list of problems generating conflicts.

Even though the memory of the past is rarely regarded as an important element of social processes, it has become a key component of many changes and revealed new directions in major public debates, which took place on the international, national as well as local scale. The text presents situations in which collective memory has become an important element of local policy and social processes, facilitating the development of the integrity of communities. We will see that it will either enhance the local development or generate divisions and conflicts within a community. Although, all the examples will refer to South-Eastern Poland (Podkarpackie province), they reflect similar problems of other countries in that part of Europe.

The attempt to present the entire spectrum of problems, which post-communist societies have to deal with, is beyond the capability of this text. It is, however, possible to create the typology of situations in which the memory of the past enters the area of modern politics and modifies it in order to comply with its own requirements. We can even risk a statement that every situation needs to be analysed by resorting to at least two important components. First of all, by taking into account the character of the memory of the past which has an impact on the modern trends in the local development. The idea is to check whether the memory of the past, rooted in the consciousness (or a symbolic space) of a local community, refers to the events or people in a positive or a negative way (in an ambivalent way). This is essential as the history of the 20th century (not only of Central and Eastern Europe) led to the permanent divisions in the area of the memory of the past and to the stigmatization of the public space with symbolism that is not always accepted by a given local community. Good examples of such symbols are cemeteries and monuments of invaders or occupants as well as places of commemoration that glorify communism and which are, more or less, willingly accepted by local communities. Second of all, the consequences that arise from keeping the memory alive. In this case, there are two main possibilities. On one hand, it creates the integrity of a community (enhancing a sense of identity, igniting the pride), leading to the stimulation of the development. On the other hand, it generates conflicts, divisions and mistrust, which creates barriers to the local development.

Situations, in which the past, the dispute over it and even the most advanced conflicts, rarely take such extreme forms so that they paralyze the functioning of

local communities. However, they always affect the functioning of local institutions. Four specific cases have been discussed below and they refer to the memory of the past of the members of various local communities in South-Eastern Poland. They reflect complicated relations associated with the memory of the past between Poles themselves, between Poles and Jews and also Poles and the Ukrainians. They refer to the memory of the past expressed in material and symbolic forms of commemoration. The presented typology is not unchangeable. Things that, today, make divisions within local communities even more rigid, in many years may become a binder, and vice versa. Collective memory can be permanent, despite social changes. However, even collective memory may, in time, undergo modifications.

Table: Typology of disputes over the past within local communities

	The memory of people and events negatively perceived by local communities	The memory of people and events positively perceived by local communities
Factor that facilitates the development of the integrity of a community/ the stimulator of the development	1 st case: The monument of Karol Swierczewski, a communist general (Baligrod, the Bieszczady Mountains)	3 rd case: The commemoration of Ulm family – a project of the Museum of Poles who rescued Jews (Markowa)
Factor that generates conflicts within a community/a barrier to the development	2 nd case: Illegal monuments of nationalist formations of the Ukrainian underground (south-eastern border of Podkarpackie province)	4 th case: The restoration of properties associated with the culture of Polish Jews (Rzeszow)

1st case: The monument of the communist general as a tourist attraction

No matter how many communist symbols were removed from the public space of Poland after 1989, one of them is permanently rooted in the consciousness of many Poles and, even today, it remains in the same place, despite many controversies. Although it commemorates a person who is remembered in a very negative way, every idea of its removal meets with the resistance from the local community.

The commemoration of general Karol Swierczewski refers to one of many “heroes” of the communism. The “hero” of the International Brigades from Spain and one of the most unsuccessful war leaders of the 2nd World War period, died in 1947 during the military actions against the Ukrainian nationalist underground in

the Bieszczady mountains. The circumstances of his death are unknown up till now. The monument of the general was erected in 1957 in the place of his death and, for many years, it was a must-see place during trips to the Bieszczady mountains. The importance of the monument was successfully ignited by the propaganda in order to create a myth of his heroic death.

With time, the monument became a big problem to the authorities of the Baligrod commune (where it is located). Demands for its removal, that were coming from the outside of the commune, had to face the arguments of the local authorities who emphasized its historical and also tourist values. The popularity of the monument is undoubtedly an asset to the commune. After 25 years from the fall of the communism the monument is still an element of the Bieszczady landscape and any attempt to make use of it in an excessive way meets with strong reactions from the regional as well as central authorities in Warsaw, responsible for taking care of the places of commemoration.

One of the examples of such a strong reaction was the reaction towards the concept of the creation of „Karol Swierczewski tourist route” which, according to media, was initiated by the local authorities. The reports, published in 2006, caused the immediate reaction of the Council for the Protection of Struggle and Martyrdom Sites in Warsaw (the institution responsible for the order in the sphere of commemoration in Poland). It demanded the explanation from the commune of Baligrod. The authorities of the commune soon explained the misunderstanding and accused media of being irresponsible. In the letter of the governor of Baligrod, addressed to the commemoration committee in Rzeszow, we read: *“we are not planning to create anything in this form. However, there is a concept of creating a tourist and historical route in the vicinity of Baligrod whose main focus would be to commemorate the martyrdom of the 1st and 2nd World War. The monument in question would be just an element of that route (...). Therefore, we think that Swierczewski’s route in the Baligrod commune was publicized by media excessively. Should such a “historical” route be created in the future, it will surely be done with the respect towards the historical truth”*, the governor’s letter dated 1st February 2007 (the documentation of the Department of Social Policy of Podkarpackie Province Governor’s Office in Rzeszow).

This incidence shows that a communist symbol can position itself successfully in a new reality of the democratic system. It also shows that the memory – even of the negative hero – may be protected if it concerns the interest of a local community and is used for the purpose of its development. Of course, the authorities of the commune can promote neither the general nor the system in which he was an official. However, they can use the margin of freedom to employ “the bad memory” of the negative hero for the good cause.

2nd Case: The illegal Ukrainian commemorations

In the 90s of the 20th century in the South-Eastern Poland there was an emergence of many illegal Ukrainian forms of commemoration, which glorified the Ukrainian nationalist underground in a more or less provoking way. These forms of commemoration caused controversy and internal conflicts within local communities and even illegal destructions and devastations. Especially because they commemorate groups which committed crimes of genocide on Poles and Jews during and after the war. What is more, the squads and members of those groups are still infamous in the areas where those crimes were committed. What is also interesting is the fact that many forms of commemoration were created in the Ukraine and then brought and installed in Poland.

Although the law assumes taking strong actions in situations like that (dismantling and disassembly of a monument or a plaque), it was never enforced in the case of those forms of commemoration. There are various reasons for this. One of them is indecisiveness of the local authorities and the fear of the reaction of the Ukrainian minority. The form of commemoration, which is most frequently a monument at the cemetery (sacred place), is also one of the reasons for it. Without any doubt, any attempts to destroy a monument at a cemetery would meet with the negative reaction of the Ukrainian minority in Poland. The nature of the place, i.e. a cemetery, becomes a certain protective umbrella which weakens the determination of the authorities, responsible for enforcing law within the scope of commemoration, to take actions.

The majority of existing and illegal forms of commemoration, related to the Ukrainian nationalist underground, are the graves of the members of the Ukrainian Insurgent Army. Although, in the case of the graves of the members of criminal groups, the law assumes its minimal character (without any elements of glorification), they are far from the regulations in terms of the size and symbolism. This, therefore, evokes various reactions of Polish citizens: from the passive disapproval to the acts of devastation.

The case of the monument, erected in 1994 in Hruszowice, is complicated as its only purpose is to glorify the Ukrainian nationalist underground and its local units. The lack of reaction from the authorities led to the attempts of its disassembly in 2014. In 2009 a similar monument was dismantled in Chryszczata. Situations like that emerge from time to time, generating tensions and conflicts.

The illegal forms of commemoration of the Ukrainian nationalist groups remind me to mention another situation that hasn't been described yet. The attempts to commemorate groups that committed mass crimes, in the form of illegal monuments, which led to internal tensions and divisions. Such situations make building understanding and reconciliation between Poles and the Ukrainians

impossible. What is more, from the perspective of the last 20 years, it can be observed that they escalate towards more radical actions.

3rd case: Polish family of the Righteous among the Nations

The story of the family of Jozef and Wiktoria Ulm from Markowa (the vicinity of Lancut) that was murdered for providing shelter to their Jewish friends, has become a subject of growing interest only recently. The reason for this was the fact that hiding such a numerous group of Jews was very heroic and the crime committed by the German soldiers was very barbarous. Ulm family was hiding eight Jews in their house for over a year. They died due to the betrayal in March 1944. Not only did the German soldier kill Jozef and Wiktoria Ulm but also the entire group of Jews and eight children of Jozef and Wiktoria (Wiktoria Ulm was eighth month pregnant at that time) (Szpytma, Szarek 2007). The exceptional devotion of the family and the process of beatification that started in 2003 made the story, that happened in 1944 in Markowa, very popular.

The popularity resulted in an idea of setting up the museum commemorating not only the devotion of Ulm family but also other Poles who took risk of helping Jews during the war (such activities were punished with the capital punishment in the occupied Poland). The name of the museum – the Ulm Family Museum of Poles who rescued Jews in Podkarpackie Province, reveals the unambiguous message that is going to be delivered there. Despite numerous comments that Polish-Jewish relations during the war didn't only come down to helping Jewish neighbours (the opposite situations also took place), it would be difficult to find anybody in the local community who would be against the idea and the form of the commemoration. The memory of Ulm family may serve numerous functions – both on the local as well as broader scale. For the local community it becomes an occasion to exhibit a heroic attitude of its members and the opportunity of promotion. In the broader sense the museum becomes an element of historical policy of the nation which proves some foreign publicists, who make Poles responsible for the extermination of Jews, wrong.

The case of Ulm family shows that the memory of the positive and heroic past actions may be used even after over 70 years by the local community to ignite the feeling of pride in the community and to support the local identity. Due to the character of commemoration the support, provided by numerous institutions and private persons, comes from outside of the commune and region.

4th case: The cultural rebirth of Polish Jews – the rebirth of fears

The last case to be discussed is another situation in which restoring the memory of the positive aspects of the past of a given community (in this case long-term and peaceful Polish-Jewish coexistence) leads (at least some of their members) to the ignition of fears, dangers and resentments.

One of the examples is an attempt to restore the memory about the communities of Polish Jews living in Poland until the war outbreak. The presence of Jews in Poland goes back to the beginning of the country. From that time the number of Jews in Poland, especially in South-Eastern Poland in its present shape, had been steadily growing. It was related to the wave of persecution, which Jews had to face in Western Europe. In the period of German occupation (1939-1944) there was about 120 thousand of Jews in Poland, the majority of whom lived in Przemyśl (18 000), Rzeszów (14 000) and Jarosław (8 000). From 1942, within “Aktion Reinhardt”, Jews were sent to the extermination unit in Belzec, where the majority of Jews from Rzeszów died (Rączy, Witowicz 2004). Not only did the war result in almost total annihilation of hundreds of Jewish communities in Podkarpackie province, but also in nearly complete destruction of the traces of their presence – places of religious cult and Jewish cultural centres.

The restoration of the annihilated communities is nowadays impossible. It is, however, possible to restore the memory of their contribution in the cultural and economic development of the area. The restoration of Jewish cemeteries, synagogues, plaques, whose aim is to commemorate the original destiny of certain places, or celebrating anniversaries that remind that history of the region is also the history of Jews, are good examples of such actions. It should also be reminded that the extermination of Jews during the Holocaust often happened in front of their Polish neighbours, the situation which future generations should make conclusions from.

Such activities do not always meet with the understanding. However, during the last 20 years of transformation in Poland, the dialogue between Poles and Jews has significantly improved. The example of a hostile reaction towards the commemoration of the Jewish influence on the history of Rzeszów, is the reaction towards the commemoration of the Zionist organization “Hangar Hacijoni” in the Community Centre in Rzeszów, which was the meeting place of the organization before 1939. The plaque installed in the Centre met with such a strong objection of Z. Wrzodak, one of the members of the parliament, that the Ministry of the Interior had to intervene. The deputy accused the initiators of the commemoration that the plaque is a symbol that undermines the independence of Poland and it is detrimental to the interest of Poland. In his protest, referring to a few paragraphs of the penal code, he says: *”It is enough to choose the right paragraph to stop similar incidents from happening again (...) the plaque must be taken down from the Polish public space”*. (A letter of Z. Wrzodak to the Minister of the Interior and Administration dated 12.10.2004).

This example shows the paradox of the situation in which the commemoration of the mutual and peaceful coexistence of Poles and Jews, that the population of Rzeszów could take pride in, is, to some members of the community,

a direct threat to the independence. This is certainly an extreme case, however, it is an example of the situation in which the memory of things worth remembering causes social divisions.

The described events show various situations in which memory of the past becomes an element of the modern policy and local actions of political decision makers. They influence important processes of the development and modernization. These are only a few examples which have been influencing the local policy in Poland since 1989. They show that, from the local perspective, the elements of history cannot be excluded and ignored in the discussion of the development. They are deeply rooted in the consciousness of the community members in the form of the collective memory of the past.

The period of communism created a lot of problems in the former socialist countries, in the sphere of the memory and coming to terms with the past. For over 50 years of the communism in Poland, the social memory of Poles was experimented on. What is more, the fact that various freedom organizations fought for independence, was ignored and put to silent and the places which witnessed the extermination of Jews, were manipulated on (on many occasions, they were presented as places of Polish suffering or the emphasis was put on the internationalist dimension of the suffering of victims). After 1989 Poles had to face the necessity to deal with the heritage to “repair” what had been destroyed or lied about in the sphere of memory.

This heritage will remain an element of the collective memory and a symbolic landscape of Poland for many years. It will take a form of the memory of local communities, which sometimes will favour its integration and development and sometimes create a barrier and generate conflicts.

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SLAWOMIR WILK

**ACTIVATION OF LOCAL COMMUNITIES – CHALLENGES FOR
SOCIAL WORKERS**

Introduction

Organizing and supporting the development of local communities is slowly starting to become an important element of social welfare system. The appreciation of the role of communities in the process of problem-solving and in the development of programs and projects, whose aim is to implement the postulates of social solidarity, is a new perception of active social assistance (Wodz, Szpoczek-Salo, 2014; Rynkowska, 2012). The article presents a model for the organization of local communities, developed between 2009-2014 (Babska and others, 2014), which refers to the Polish tradition of community work. An important element of the model is an approach based on the transformation of the environment by means of its strength. This approach was supported by Helena Radlinska (1961) in the interwar period. The article presents an organizer of a local community as a newly developed profession in Poland. It also presents the tools and examples of organizing local communities.

After two decades since the political transformation, the status of social assistance in Poland is still not straightforward. The network of social assistance institutions, that was set up in 1990 (on a commune level) and in 1999 (on a district level), made the introduction of socio-economic reforms less dramatic. Despite the implementation of various forms of professional development, social workers function more as clerks, whose main task is to grant benefits, rather than workers who provide social assistance. The situation started to change when Poland was about to join the European Union which favours activation rather than protection in the situation of e.g. high unemployment or poverty (the practice not present in Poland). The Social Assistance Act, introduced in 2004, favoured the development of social assistance through the implementation of social contracts for people who are helpless in the face of life. Moreover, the introduction of a new profession, a family assistant who provide professional service to families and their members, enhanced the development of methods used in working with an individual. The professional literature says that, in Poland after 1989, the least attention was drawn to the third method of social assistance (Wodz, 1998) and to the outreach activities provided to a local community (community work) (Twelvetrees, 2014). It needs to be emphasized that, before the 2nd World War, Poland had strong traditions related

to the development of social education, including work of Helena Radlinska (1935), Theiss (1984).

Unfortunately, the after-war years slowed down the development of ideas and methods of community social assistance, which explains its rebirth nowadays. The results of the national research, conducted on a group of social workers, proves that there is a big demand for community work (Rymsza, 2012).

For the purpose of the development of the new forms of work with local communities, a new model for the organization of local communities was created (OLC)/community social assistance. The model was developed as a part of the project funded by the European Social Funds, "Creating and developing the standards of social integration and welfare services". The initiator of the project was the Department of Social Support and Integration in the Ministry of Labour and Social Policy, and the leader of the project was the Human Resources Development Centre. This article presents the model of the organization of local communities (referred in this text as an OLC model) as a concept of community social work. It was developed by two non-governmental organizations: CAL Association; the Centre for Supporting Local Activity and the Foundation; the Institute of Public Affairs. The available literature on the subject matter was also used in the development of the model. What was also taken into account was the practical experience of the above mentioned organizations in the scope of animation and support provided to various public institutions (e.g. social support centres, cultural centres or schools) and to non-governmental organizations in the activities directed at the development of local communities (Skrzypczak, Jordan, edit. 2002; Skrzypczak 2004; 2003; Kazmierczak, edit. 2008).

Community work as a professional activity

In 1917, Mary Richmond defined the subject matter and the fundamental regulations of social work. She pointed out that social work should be based on the relation between an individual and a community. Such differentiation gave grounds to determine two fundamental attitudes present in social assistance: clinical social assistance and the organization of local communities. Therefore, community work has got the same origin as social assistance. To implement community social work we need organizers of local communities. However, one question has to be asked: What does it mean to be an organizer of a local community? The job of an organizer of a local community has its roots in social assistance and it belongs to a group of, so called, helping professions. When returning to the roots, it needs to be emphasized that the origin of this profession has got a rich history. In the 19th century the settlement houses were developed. The first one, Toynbee Hall, was set up in London in 1884. However, the first important initiative was the Chicago Hull House, set up in 1889. Their functioning was based on the aspects which are still in

use, i.e. the organization of services, the organization of community members and advocacy. In 1975 three classic models for the organization of communities were determined: social planning, locality development and social actions. In 2007 Rothman updated his concept by changing the names of his concepts: planning and policy was replaced by social planning, community capacity development by local community development, social action by social advocacy. Moreover, Rothman came to the conclusion that a change in a community, that is going to take place, is based on the development of its potential. That happens when community members, who experience problems, are empowered by the knowledge and skills that they need to understand their own problems. This will make them initiate cooperation in finding solutions to their problems (Kazmierczak, 2014).

An organizer of a local community in the OLC model plays three compatible roles: of a local animator, of an organizer of social networks and of a local planner. Animation is one of the fundamental types of community work as it influences individuals and groups on a local scale. It also vivifies their artistic potentials and makes social changes possible to happen in small local communities. Some of the results of activation are: the noticeable changes in the attitudes of individuals and groups, i.e. in lifestyle, the changes in the system of values, the development of competences, skills and knowledge (Chaskin, R. J., Brown, P., Venkatesh, S., & Vidal, A. 2007). As an animator, an organizer of a local community encourages people, groups and entire communities to act. They initiate and support actions that lead to the development of structures necessary in finding solutions to problems and meeting various needs. An animator does not take on a role of a leader in a community, as their task is activation, not management. The role of an organizer of social networks is based on the development of communication networks, the cooperation with various entities (units, groups, institutions, organizations) and the initiation of local partnerships (networking). The term “networking” is strongly related to the idea of social capital (Coleman 1988; Putman 1995) based on cooperation and trust, which create an opportunity to take actions by using the variety and wealth of networks of social resources (Gilchrist, 2009).

An organizer of a local community is also a planner – a person responsible for social planning, which is related to the research and planning strategies used to free the potential and to increase the resources of a community (Dubois, B., Miley, K. K., 1996; Trawkowska, D., 2010).

As a professional activity, the organization of local communities requires certain knowledge and basic skills of community work and also skills related to certain professional roles taken on by an organizer. Therefore, an organizer should not be engaged in politics. Interpersonal skills are also important when working

with a local community. They have been presented in the table 1, for a number of roles in the OLC model.

Table 1 The catalogue of specific skills required for certain roles taken on by an organizer of local communities

A local animator	A social network organizer	A local planner
<p>Skills for assisting community members in the process of organizing and working in task groups:</p> <ul style="list-style-type: none"> ▪ identifying strong and weak elements of communities, their resources, problems, development opportunities ▪ building social relations ▪ group development ▪ facilitating group processes ▪ advising on the organization of work and the management of a team ▪ building and maintaining cooperation between groups/ organizations 	<p>Skills for building social networks:</p> <ul style="list-style-type: none"> ▪ arranging conditions for establishing relations and social connections <ul style="list-style-type: none"> ▪ choosing communication and cooperation mechanisms appropriate for a given type of a network ▪ maintaining network activity and the activity of its members <ul style="list-style-type: none"> ▪ building and maintaining meta-networks 	<p>Skills for assisting community members in the processes of the development of public policies:</p> <ul style="list-style-type: none"> ▪ educating about the rules and mechanisms of developing and managing public policies <ul style="list-style-type: none"> ▪ advising about the possibilities of joining in the processes of the development of public policies and about the forms of participation ▪ designing services ▪ organizing social campaigns ▪ advising about employing appropriate forms of protest

Source: Kazmierczak, T. (2014). *Być organizatorem społeczności lokalnej*, in: Kazmierczak T. (and others) *Organizator społeczności lokalnej – refleksyjny praktyk*, p.40. Warsaw: the Institute of Public Affairs

Model assumptions

According to the assumptions of the OLC model, social services may be implemented by both: public institutions; local social assistance centres and non-governmental organizations, which offer support in the areas of social assistance, reintegration, activation as well as local development.

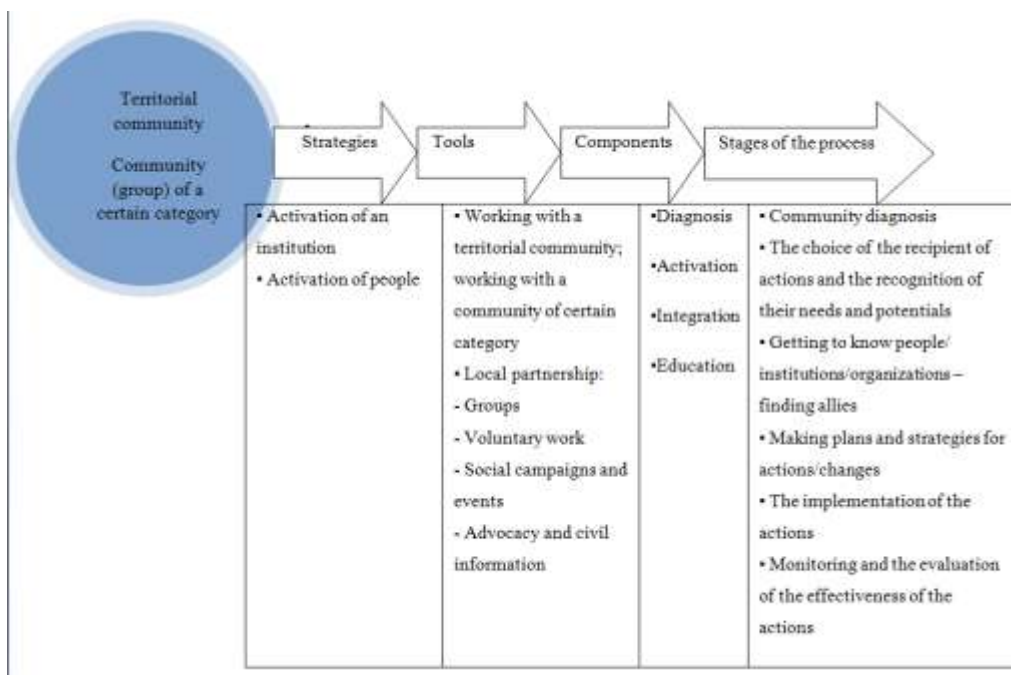


Figure 1: The OLC model for the organization of local communities, including the main areas of activity. Source: Babska, B., Dudkiewicz, M., Jordan, P., Kazmierczak, T., Kozdrowicz, E., Mendel, M., ... & Skrzypczak, B. (2014). *Ramowy model środowiskowej pracy socjalnej/organizowania społeczności lokalnej*. Warsaw: the Institute of Public Affairs. p. 29

The suggested model serves the purpose of activating and motivating people and institutions. The first strategy of the development is based on motivating people, which means direct work with people living in a given area. The second strategy is based on motivating institutions: local administration, parishes, cultural centres, non-governmental organizations, through the promotion of a new attitude towards the challenges of stimulating social activity and engaging marginalized units in social life.

The tools used for the purpose of organizing a local community are divided into two groups. The first group (axis) refers to working with communities in certain areas (a city, an estate, a block of flats) and working with communities of a certain category¹, i.e. people who are in the sphere of interest of social assistance. The second group of tools is comprised of supporting tools, which are used to create local and long-term partnerships directed at achieving a permanent and beneficial social change. Partnerships created within the OLC model may be of a strategic or

problematic character. The strategy of partnerships is based on the actions that are aimed at the development of a larger community, including issues of all its members. Another example is a tool that allows establishing and supporting groups (by means of animation, self-organization and self-support). It allows to implement actions within a society in a certain area or of a certain category. The OLC process engages small social groups (i.e. self-support groups, professional support group, civil and educational groups) as well as larger groups which consist of the representatives of societies/groups of a certain category, such as senior clubs or mother groups. Voluntary work is also a very important tool, as it is one of the most meaningful forms of activation. Events and social campaigns are equally essential. As supporting tools, they have the power to change the beliefs, attitudes and habits. Various local events may also be regarded as a separate tool used for facilitating the changes in a local community. They aim at integration, education and activation of people by making them a part of the preparatory process as well as a part of implementation and evaluation. Advocacy and civil information are the last tools suggested in the model. They have been chosen due to their importance in the process of a social change. The first one is related to managing actions, whose aim is to draw attention to the problems and needs of marginalized communities, and to expressing and defending their interests. The second tool is related to organizing and making information, especially civil information, more accessible.

In the discussed model (Babska and others, 2014), four components have been assumed: diagnosis, activation, integration and education. They specify actions which support the organization of local communities. The diagnosis is the process of research and the analysis of a situation of a given community with regards to its potential, needs and problems (reasons, symptoms and results of that situation are also taken into account). The activation means the development of networks of relations and mutual contacts as well as engaging people, living in a given area, in common actions. The process of integration means the creation of common values and activity patterns as well as the establishment of common points of views, interests and institutions. The last element is education, particularly non-formalized educational system. It leads to the increase in the level of knowledge and skills of local community members with the result of a greater commitment.

The professional implementation of the OLC model requires undertaking actions according to a certain, methodical scheme used within a community in a given area and of certain category. These actions take place in a repeatable cycle, which is implemented to the point where certain structures, which will be able to function independently in the further development of a community, appear. The cycle consists of six stages in which citizens and local institutions (e.g. communes, cultural centres, parishes, non-governmental organizations) should take part. The cycle is divided into the following stages: community diagnosis, the choice of the

recipient of actions, the recognition of their needs and potentials, getting to know people/institutions/organizations – finding allies, making plans and structures of actions/changes, the implementation of the actions, monitoring and the evaluation of the effectiveness of the actions.

The main aim of the OLC model is to change an unfavourable situation of communities threatened by social exclusion. The changes refer to three areas: 1) certain results of common actions, 2) personal development of local community members and 3) (the most important one) changes in the sphere of empowerment, where the effectiveness of actions is measured by CEICC scheme: **Consistency** (the level of respect, sensitivity, identity and fight for equal opportunities); **Empowerment** (the level of self-confidence, self-evaluation, readiness for changes); **Influence** (the extent to which people feel they can influence or make decisions); **Commitment** (the level of common thinking, trust, relations, motivation); **Cooperation** (the level of networks, openness, readiness for cooperation) (Babska (a) and others, 2014).

Conclusions

It is beyond any doubt that the cooperation between community members, non-governmental organizations, public institutions, i.e. social assistance centres, local government, lead to the activation of local communities and may result in general stabilization of social order. It may also lead to making living conditions of local communities and within one community equal. The implementation of the OLC model may result in the creation of various benefits for numerous groups, which has been described in the publication which defined the model (Babska and others, 2014). Benefits obtained by community members are especially important as they lead to the improvement of the quality of life (as the result of solving or minimizing problems and meeting certain needs). They also lead to the increase in the level of empowerment, self-evaluation, activation and the commitment to common issues and power. Analysing benefits on a local level, we need to say that community members are characterized by greater commitment and responsibility for their own issues as well as issues of the whole community or commune. The OLC model diminishes the phenomenon of social exclusion and creates equal opportunities by engaging marginalized groups in social life. Moreover, the model has a positive influence on social, cultural as well as economic development (the creation of new job vacancies). Social assistance centres (and their staff) are among the institutions which, by working with local communities, also gain benefits. The implementation of the model makes it possible to leave the institutional role behind, whose main aim is to grant social benefits, and to take on the role of a social actor whose position in the community will become stronger very quickly. Through the implementation of the model the institution gains knowledge (in the form of diagnosis) which is used for effective actions and for changing social reality. The

permanent introduction of the OLC model into the policy of social assistance centres leads to the change of the way the institutions are perceived, which results in greater trust towards them. Non-governmental organizations may also benefit from the implementation of the model. It may serve the purpose of strengthening the role of a civil society in process of development and implementation of social policy. It also creates the right conditions for the establishment of new initiatives, e.g. associations.

The need for cooperation, especially on a local level, is unquestionable. The bigger part of a society is passive, the longer Poland will be catching up with other countries in terms of social development. We cannot build a strong country without the participation of all community members. If we want to become a country with the high level of civil activity, it is necessary to take care of education and the development of the society on a local level. Human activity, in general, is the foundation for establishing social bonds and interpersonal relations. Social activity is one of the forms of human activity which goes beyond the level of fulfilling substantial needs of life. In many places a success is possible only thanks to the commitment and endurance of people who, thanks to their personality and skills of uniting others, are able to deal with almost every difficulty. However, they should be professional with the appropriate level of knowledge and skills and certain level of social sensitivity. They should have good knowledge of the most important reasons for social problems and ideas of how to solve them. Their attempts may not bring any results unless they find partners among community members who are willing and able to cooperate. The model for the organization of local communities may be of certain help for local leaders, as it brings benefits to many groups in a local community.

Groups of certain category has been distinguished in the article 7 of the Social Assistance Act due to their problems and dysfunctions (Journal of Laws from 2004, No. 64, item. 593 as amended). They are entitled to receiving support due to: 1) poverty, 2) orphanhood, 3) homelessness, 4) unemployment, 5) disability, 6) chronic or serious illness, 7) domestic violence; 7a) the need to protect victims of human trafficking, 8) the need to protect motherhood or large families, 9) feeling helpless in the face of providing care or upbringing and in keeping house, especially in single parent or large families, 10) (repealed); 11) difficulties in the process of integration of foreigners who have a refugee status, subsidiary protection or a permission for temporary stay granted in the event specified in the article 159, obligatory provision of permission for temporary stay in order to be united with a family, paragraph 1 point 1 letter c or d of the Act of December 12 2013 on foreigners; 12) difficulties in adjusting to life after being released from prison, 13) alcohol or drug abuse, 14) random events and crisis situations, 15) natural or ecological disasters. Moreover, the support may be granted to groups mentioned in

article 2 o the Act on Social Employment (Journal of Laws from 2003, no. 122, pos. 1143 as amended); 1) people who have been unemployed for at least 36 months, 2) people addicted to alcohol or drugs or other intoxicants who are undergoing the process of treatment or finished the treatment, 3) homeless people who are implementing individual programs for coming out of homelessness, 4) ex-prisoners, 5) people who are mentally ill, 6) refugees who experience difficulties in the process of integration.

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SORIN ȘIPOȘ

**ENTRE ORIENT ET OCCIDENT: L'ESPACE ROUMAIN DANS LES
RECITS DES VOYAGEURS ETRANGERS (FIN DU XVIIIIE SIECLE
- DEBUT DU XIXE SIECLE)**

Introduction

L'espace roumain a suscité l'attention du monde occidental avec la Reconquête autrichienne, débutée en 1683, après une période dans laquelle l'Empire Ottoman semblait dominer à jamais des vastes régions dans l'Europe Centrale et du Sud-Est. D'une part, l'apparition de la *question orientale*, liée à l'héritage de l'Empire Ottoman, dans les rapports entre les grands pouvoirs européens, a maintenu l'attention politique sur le bas Danube (Oțetea, 1980, p. 69-176). D'autre part, le remplacement du pouvoir suzerain des princes autochtones par celui des princes grecs au début du XVIIIe siècle, a augmenté l'influence de la Porte et a donné la fausse sensation que la frontière de l'Empire Ottoman avait franchi la ligne du Danube et que les Turcs avaient effectivement pris possession des Principautés roumaines. Mais certains cercles occidentaux étaient déjà sensibles à l'espace oriental du continent et leur intérêt a augmenté progressivement, au fil du temps. Le passage de la «Petite» à la «Grande Europe» était en train de se faire, et le Siècle des Lumières, avec son appétit pour les réalités exotiques, avec son idée de «citoyen de l'univers», avec son discours cosmopolite, allait lui offrir un cadre adéquat.

Les conflits militaires russo-austro-turcs ont aussi peu à peu porté le monde roumain à l'attention des grandes puissances européennes. Les boyards moldaves, à l'occasion des négociations de paix, ont démontré que les Pays roumains ont bénéficié, pendant le Moyen Age, des relations privilégiées avec la Porte, en leur reconnaissant et l'autonomie et des institutions (Georgescu, 1970). Dans ce contexte, l'Occident est informé des récits de ceux qui ont voyagé et ont écrit sur l'espace roumain dans les siècles antérieurs, qu'au nord du Danube existe un peuple d'origine latine, qui avait auparavant joui de l'autonomie totale de la part de l'Empire Ottoman (Papacostea, 1999, p. 240). Les guerres napoléoniennes augmentent l'intérêt de la France pour l'espace de l'Europe de Sud-Est, au fond du déclenchement des hostilités avec la Russie (Eliade, 2000, p.176-198; Nouzille, 1999, p.3-36).

Ultérieurement, pendant que la crise de l'Empire Ottoman s'accroissait, les grands pouvoirs entrés en compétition pour l'héritage des possessions ottomanes en Europe ont cherché les meilleures solutions pour dominer ces espaces. A fin de légitimer la nouvelle réalité politique, la Russie, l'Autriche et la France ont

intensifié leurs initiatives de se lier d'amitié avec l'élite politique des Principautés roumaines, en lui promettant les anciens privilèges et une plus grande autonomie du pays. Cependant, l'argument fondamental, pour lequel l'élite politique devait être reconnaissante, était la libération des provinces roumaines de la domination de la Porte. Et ce dernier argument n'était pas négligeable, admettons-le. Depuis longtemps, les pays roumains représentaient pour les sultans et les hauts dignitaires ottomans seulement une source de revenus obtenus avec des efforts infimes.

historiographie de la question : Sources et méthodes

Le thème examiné, d'une grande ampleur, a suscité l'attention de nombreux auteurs roumains et étrangers: Nicolae Iorga, Pompiliu Eliade, George Pascu, Paul Cernovodeanu, Maria Holban, P.P.Panaitescu, Neagu Djuvara, Klaus Heitmann, Dan Amadeo Lăzărescu, Andrei Cornea, Nicolae Isar, Pierre-Yves Beaurepaire et Pierrick Pourchasse, Daniel Barbu, Nicolae Boșan, Sorin Mitu, Toader Nicoară, Mihaela Grancea, Neagu Djuvara, Alexandru Dușu, Germaine Lebel, Larry Wolf, Maria Todorova.

L'intervalle du temps recherché s'étend sur une durée de 10 ans, entre 1800 et 1810. C'est une période de conflits politiques et militaires, plus précisément celle de la guerre entre la Russie et la Turquie de 1806-1812. La guerre était devenue une constante pour l'espace roumain; elle était entrée dans le quotidien de ces pays.

Pour mener à bien cette étude, il est nécessaire de connaître avec précision quelques points importants. Tout d'abord, il est important de connaître le nombre de voyageurs qui ont parcouru l'espace roumain et en ont laissé des documents écrits. Ceux-ci sont évidemment nombreux. Si une certaine réalité apparaît mentionnée chez la majorité des voyageurs, par exemple le système de communication, on peut prendre cette information pour exacte. Mais il faut que le nombre de témoins soit le plus important possible.

Une seconde question est la formation du voyageur, ses raisons de voyager et la direction par où il est entré dans les Pays Roumains. Cette question n'est pas négligeable. Une meilleure éducation lui permet de faire des observations profondes, diverses et, ce qui est très important, critiques. Sa formation intellectuelle lui permet aussi d'obtenir, au moins théoriquement, des informations des ouvrages antérieurs mais aussi de s'en informer auprès de ses contemporains.

Pourquoi compte la direction d'entrée des voyageurs dans l'espace roumain? Un voyageur passe avec certaines impressions de la Transylvanie en Valachie, et d'autres sentiments se dégagent des récits du celui qui quitte la Moldavie et la Valachie pour entrer en Transylvanie, Maramureș, Bucovine ou Banat.

Qui sont ces voyageurs qui ont parcouru l'espace roumain dans cet intervalle de temps? Dans la période analysée, on a conservé les récits de voyage de 28 personnes qui ont traversé l'espace roumain. Si l'on prend la nationalité pour critère,

6 voyageurs sont Français, 4 Allemands, 4 Anglais, 3 Russes, 2 Autrichiens, 2 Espagnols, 1 Hongrois, 1 Écossais, 1 Danois, 1 Italien, 1 Arménien et deux à origine inconnue: un Grec ou Levantin, un Hongrois ou Autrichien.

En ce qui concerne leurs professions, 10 sont fonctionnaires supérieurs dans le Ministère des Affaires Étrangères: des consuls, des commissaires pour les affaires commerciales, des diplomates, 8 sont officiers ou ont affaire avec l'armée (médecins militaires), mais on trouve aussi 1 archéologue, 1 explorateur, 1 géologue, 1 collectionneur d'antiquités, 1 professeur, 1 statisticien, 1 moine, 1 archiduc. La plupart des voyageurs ont donc effectué des études supérieures.

Quant au lieu d'où ils commencent leur voyage, à la direction d'où ils pénètrent les Pays Roumains, 14 viennent de l'Europe Centrale, 9 de Constantinople et 5 de l'Empire Tsariste. Le résultat reflète le rapport de forces et l'intérêt pour l'espace roumain au début du XIXe siècle. En fait, il s'agissait d'un rapport égal des voyageurs venant de l'Ouest vers l'Est et le Sud avec ceux venant de l'Est et le Sud.

Les informations documentaires utilisées

Pour l'élaboration de leurs notes, ces voyageurs ont parfois utilisé – en prenant des pages entières ou seulement des informations courtes – les travaux de divers auteurs. Parmi ceux-ci, il faut mentionner : Wilhelm Bawr (Bawr, 1774, 1778), Jean Louis Carra (Carra, 1777), baron de Tott (de Tott, Barin, 1785), Sulzer (Sultzer, 1781), Peyssonnel (de Peyssonnel, 1765), Dimitrie Cantemir (Cantemir, 1716), Nicolas Ernest Kléman, Elias Abesci (Abesci, 1892)³³, William Eton (Eton, 1801)³⁴, Lafitte-Clavé³⁵, Johann Christian von Struve (von Struve, 1802, 398 p.+pl.), Raicevich, Ignatz von Born, Reicherstorffer et Bonfinius.

On peut supposer qu'au-delà des informations topographiques recueillies des officiers russes et autrichiens, ils ont utilisé également d'autres informations d'ordre géographique. En même temps, ils ont recueilli des informations de l'élite politique du pays. Les observations et les constats personnels ont été sans nul doute aussi d'une grande importance, tant en ce qui concerne les réalités des principautés qu'en

³³ La compilation attribuée à Elias Abesci a été publiée à Londres, en 1784, sous le titre : *The Present State of the Ottoman Empire...*, et traduite en français sous le titre *État actuel de l'Empire Ottoman*, vol. I-II, Paris, 1892.

³⁴ William Eton, voyageur anglais dans les Pays Roumains qui a publié une œuvre en 1798 sur l'Empire Ottoman, connu chez nous par sa traduction française réalisée par G. Levebre, sous le titre *Tableau historique, politique et moderne de l'Empire Ottoman*, 2 vol., Paris, 1801.

³⁵ D'André Joseph de Lafitte-Clavé a resté le *Journal d'un voyage sur les côtes de la mer Noire du 28 avril au 18 septembre*, qui a constitué pour Le Clerc une source d'inspiration pour la description du bras et de la localité de Sulina, manuscrit conservé au Service historique de la Défense (Vincennes, France), Archives du Génie, ms. 117.

ce qui concerne leurs rapports avec la Porte, la Russie et la France. Pour ce qui concerne les réalités économiques et sociales, les observations personnelles sont, sans doute, les plus importantes. Les constatations directes apportent un plus de fraîcheur au rapport officiel et, en même temps, dévoilent des sentiments plus intimes sur l'espace et les habitants.

La perception de l'espace roumain, espace de frontière entre Orient et Occident ?

La direction par laquelle les voyageurs pénètrent dans l'espace roumain exerce une grande influence sur leur récit. Tel qu'on a déjà vu, la direction majoritaire d'entrée était celle de l'Europe Centrale. L'entrée dans le Pays roumain par l'Empire Ottoman ne produit par contre pas de modifications importantes dans la perception des voyageurs. Traverser le territoire de la Munténie les rend plutôt heureux, surtout au moment où ils se rapprochent de la frontière avec le Banat, la Transylvanie et la Bucovine.

La perception de l'espace roumain, des frontières que les voyageurs traversent offrent l'occasion de faire des commentaires savants, des considérations géopolitiques mais de donner des opinions personnelles qui ont leurs origines dans les expériences vécues. Par exemple, Armand-Charles Guilleminot, avec ses yeux d'ingénieur topographe, fait une radiographie de la position géopolitique des principautés, en la plaçant dans le contexte général européen et en la mettant en liaison avec les ressources du sol et du sous-sol. Une telle association et comparaison conduit l'auteur vers l'assertion suivante:

„Baignées par le Danube, mouillées par des rivières navigables ou qui pourraient en devenir à bas coûts, situées entre deux grandes empires, la Russie et l'Autriche, en communiquant avec le Constantinople par le Danube et par le Mer Noire, les deux provinces de la Moldavie et de la Valachie, sous une direction sage, pourraient devenir – grâce à l'énorme fertilité de leur terrain, par le commerce qu'elles pourraient faire grâce à l'avantage de leur emplacement topographique – parmi les pays les plus riches de l'Europe“ (Mémoire...Guilleminot, cota IM 1618/29, p. 26).

On peut soupçonner l'auteur de positions partisans ou d'exagérations regardant l'avenir des principautés. Malheureusement pour les Pays Roumains, la situation au moment où Guilleminot se trouvait ici est décrite à une objectivité maximale.

A son tour, Daniel Clarke perçoit le passage de l'Empire Ottoman vers le Pays Roumain, province sous domination de la Porte, en relation avec un certain type de confort offert par le voyage dans un carrosse et, évidemment, un certain type de mentalité.

„Le 16 avril j'ai traversé le Danube. Sur l'autre rive les carrosses du prince du Pays Roumain. [...]. Certains des turcs n'avaient jamais été dans un véhicule à roues et quand les carrosses se sont mis en marche ils ont sorti leurs têtes par la fenêtre, ayant les regards le plus pitoyables qu'on peut s'imaginer... Et pour nous, le changement n'était pas moins mémorable, car il avait passé un an et demi depuis quand nous avons quitté la Russie et pendant tout ce temps nous avons voyagé sans avoir une seule fois à notre disposition un carrosse à roues“ (Călători străini, 2004, p.56).

Le carrosse est pour le voyageur le synonyme de la civilisation, d'un certain mode de vie. Pour les turcs qui accompagnaient leur ambassadeur vers Vienne, le carrosse produit des doutes, même de la peur. Daniel Clarke également, qui n'avait jamais voyagé en Turquie jusqu'à ce moment-là, a les mêmes sentiments. Les lecteurs apprennent, d'une manière indirecte, le fait qu'au nord du Danube on est plus proche de la normalité. Cependant, la vraie frontière de l'Empire Ottoman est pour Daniel Clarke plus au nord. « Voir l'emblème impérial, peinte sur un panneau, placé sur le coté d'un mont, nous donnait la bonne nouvelle qu'après avoir passé un petit pont qu'on voyait devant nous, nous aurions quitté l'Empire Ottoman » (Călători străini, 2004, p.67). L'auteur ne cache pas sa joie de passer dans l'Empire des Habsbourg. Voir l'emblème impérial lui donne un sentiment de sureté et il regarde maintenant avec optimisme le voyage, évidemment en opposition avec les expériences subies dans le Pays Roumain. Cet aspect nous conduit vers une méditation sérieuse sur le concept de frontière. Notre voyageur traverse des frontières politico-administratives, mais des frontières culturelles, de civilisation, des frontières mentales à la fois. La première expérience de Daniel Clarke pourrait s'intégrer dans la catégorie des frontières mentales. Au deuxième passage de la frontière, le voyageur anglais parcourt la frontière politique entre l'Empire Ottoman et l'Empire des Habsbourg.

Mais il a aussi en Transylvanie une autre expérience, que l'on peut voir comme un retour à la normalité de la vie civilisée, exprimée dans les mots suivants : « Le fait de voir aux fenêtres des visages de belles femmes était une telle nouveauté pour nous qu'on se croyait transportés dans un autre monde » (Călători străini, 2004, p.70). L'anormalité vécue dans l'Empire Ottoman concernant le statut de la femme dans la société musulmane conduit l'auteur à regarder de manière étonnée tout élément qui tient à la normalité du monde chrétien.

Pour le lord William Cavendish Bentinck « la terre de la Transylvanie... est, en général, cultivée » (Călători străini, 2004, p.125). La différence entre la Transylvanie et le Pays Roumain est l'ordre, la terre travaillée, à différence du pays récemment quitté. Daniel Clarke remarque à son tour la même chose : Après avoir quitté Băița nous avons trouvé de nouveau des espaces ouverts et nous avons descendu des montagnes dans les régions fertiles de la Transylvanie. Ici, tout avait

un autre aspect : «des champs ensemencés immenses, des paysans gais et souriants, des bœufs sains, des villages nombreux, rien n'était semblable au pays qu'on venait de quitter» (*Călători străini*, 2004, p.67) . Dans le nouveau pays on trouve du calme, de la prospérité, des villages nombreux, des gens contents, autrement dit des choses qui leur rapprochent de la normalité du monde civilisé, trouvé en opposition avec les réalités du Pays Roumain, récemment quitté.

A son tour, William Wittman, médecin militaire qui traverse le Pays Roumain, la Moldavie et la Bucovine, la Galice, la Silésie en arrivant à Vienne, a le même sentiment en passant par la Moldavie en Bucovine : « Je suis parti de Dorohoi, avec un court arrêt vers Herța et après vers la station de la poste à côté de Cernăuți, où habite le directeur de la quarantaine. Ici se trouve la quarantaine, où on inspecte les passeports et les valises avant l'entrée des étrangers dans l'Empire allemand » (*Călători străini*, 2004, p.136). Le sentiment de traverser une frontière politique est beaucoup plus prégnant au passage du Pays roumain et de la Moldavie à l'Empire des Habsbourg que de l'Empire Ottoman vers les deux pays. La présence des soldats, des gardes-côtes, des douaniers, la quarantaine organisée, la vérification des passeports et des marchandises augmente ce sentiment de passage d'un pays dans un autre, d'une civilisation occidentale à une orientale. L'existence de la frontière militaire entre l'Empire des Habsbourg et les Pays Roumains, des points de passage, de la quarantaine, accentuent le sentiment de l'existence d'une séparation, d'une frontière entre l'Empire et les Pays Roumains. Or, ceci n'existe pas lorsqu'on traverse le Danube, fait qui induit en erreur les voyageurs qui considèrent qu'en entrant dans les Pays Roumains ils entrent dans l'Empire Ottoman.

Daniel Clarke remarque cet aspect très important pour la création d'une image correcte sur un espace. Car cela dépend du système de référence auquel on se rapporte.

„Un anglais déménagé subitement de son pays aux habitudes de propreté à l'intérieur de l'Allemagne, se plaindra des manières grossières et de la saleté des habitants, mais après avoir voyagé beaucoup de temps en Turquie, le contraste offert à l'entrée en Transylvanie produit une impression totalement différente dans son cerveau et les mêmes gens qu'il voyait sales en comparaison avec les anglais sont propres en comparaison avec les turcs“ (*Călători străini*, 2004, p.69).

Le monde ottoman devient l'étalon, le repère de la misère, de la pauvreté, pendant que l'Angleterre est au pôle opposé. Entre les deux extrêmes, l'auteur intègre le monde allemand de la Transylvanie, nettement supérieur à la Turquie, mais inférieur aux réalités d'Angleterre.

De nombreux voyageurs remarquent les vêtements, les maisons et la propreté ou la misère des habitants. C'est un élément important qui entre dans la catégorie de la civilisation. L'ordre, la discipline, la prospérité, la propreté, les manières, le

confort sont l'apanage de la société civilisée. Au contraire, le désordre, la misère, la pauvreté sont associés aux régimes tyranniques, despotiques qui exploitent ses ressortissants.

Vincez Batthyány également, noble hongrois, conseiller aulique, fait preuve de telles expériences. Ses deux voyages sont de l'Empire des Habsbourg vers le Pays Roumain et la Moldavie. Son audience chez Alexandru Moruzi lui produit les impressions suivantes :

Lorsque je suis arrivé au seuil de la porte, le prince a quitté sa basse table à écrire à côté de laquelle il était assis sur un coussin, pour qu'il s'assise, d'après la mode turque, sur un divan qui s'allongeait tout au long du mur. Le comportement de ces gens est très semblable au celui des turcs, sauf que les cochers du seigneur portaient des fourrures d'après la mode hongroise (Călători străini, 2004, p.106).

A différence du monde occidental, des influences orientales prédominaient dans les capitales des deux pays roumains, au moins au niveau de l'élite politique: le coussin sur lequel le prince était assis, l'absence de chaise, le divan placé au long du mur, les vêtements de l'élite politique qui étaient de mode turque. Seuls les cochers portaient des vêtements de la mode hongroise. La cour princière est également entourée par de hauts murs, d'après la coutume ottomane.

Arrivé à Iași, le haut fonctionnaire impérial remarque le fait que, chaque jour après le déjeuner, on chante la musique des janissaires (*Călători străini*, 2004, p.106). A ces exemples et expériences Vince Batthyány ajoute d'autres : «*Comme à Constantinople, on voit partout des têtes chauves et des pieds qui restent croisés. Les gens tirent de la pipe, ils voyagent et ils s'habillent d'après la mode de cette capitale et les serviteurs asiatiques restent sur les tréteaux des carrosses allemands des boyards.*

Les têtes chauves, les pieds croisés, la pipe sont d'autres symboles qui font croire le voyageur autrichien qu'il est plus proche de l'Orient que de l'Occident (Călători străini, 2004, p.105)».

Le même fonctionnaire autrichien remarque que l'élite politique du pays fait déjà preuve de mimétisme. «*J'ai rendu visite chez quelques boyards. Ils tiraient de la pipe au tuyau long, habillés en manteaux princières et pantoufles et ils nous ont offert une confiture servie par un serviteur habillé en soie. Le prince nous a reçu aussi avec de la confiture, en suivant après le café et le narguilé à essence à bonne odeur. Quand nous sommes entrés, il s'est levé du divan et il a mis à côté la pipe à long tuyau.*» (*Călători străini*, 2004, p.105).

Ignacio María del Corral y Aguirre, diplomate de l'Espagne à Constantinople, présent le 29 avril 1800 à Bucarest, remarque les mêmes aspects lors de sa rencontre avec Alexandru Moruzi : «*aujourd'hui j'ai visité un prince qui m'a reçu bien et m'a honoré à l'orientale*» (Papahagi, vol. XXXIII, 1947, p.34).

Les différences entre la Transylvanie et le Pays Roumain sont évidentes pour le Français Louis Allier de Hauteroche, typographe et plus tard vice-consul, passionné par la numismatique. Pendant son chemin de retour de Constantinople vers la France, il traverse le Pays roumain et la Transylvanie. Il suit, comme la grande majorité des voyageurs, le chemin vers le Pays roumain et la Transylvanie en passant par Turnu Roșu. C'est seulement après être passé en Transylvanie et pris contact avec les réalités de la Principauté qu'il fait les constatations suivantes: « J'ai vu la terre travaillée, des charrues, des travailleurs, des sillons de terre et beaucoup de paysans en mouvement. Le contraste avec le pays que j'avais traversé m'avait prouvé le fait que je n'étais plus en Turquie» (Pippidi, 1987, p.119). Dans ce cas aussi, la multitude des habitants, la culture de la terre, les instruments de travail sont des signes que nous sommes entrés dans un autre monde. Il traverse une frontière politique, mais, en même temps, une frontière de civilisation. Le travail de la terre, la multitude des habitants suppose de l'ordre, de la stabilité, de la prospérité.

Une attitude très semblable se retrouve aussi chez Christine Reinhard. Son voyage de Vienne, par Pest, Timișoara, Brașov, le Pays roumain, Constantinople lui offre la possibilité de faire de nombreuses considérations concernant le long trajet qu'elle effectue avec son mari. Bien difficile, le trajet de Transylvanie a été subi avec beaucoup de stoïcisme, malgré les difficultés rencontrées. Le grand inconnu est le passage vers le Pays Roumain et, implicitement, vers l'Empire Ottoman. La voyageuse écrit qu'à Turnu Roșu, un bâtiment conservé et peint en rouge n'offrait rien d'intéressant; mais il avait pour elle une signification particulière, en représentant la barrière qui la séparait de ce qu'elle aimait. Christine Reinhard sent qu'elle entre dans un autre monde et ce bâtiment sépare, d'une manière symbolique, un monde qu'elle connaissait depuis longtemps d'un autre monde inconnu et dépeint des couleurs les plus sombres.

Au-delà de ses mauvais pressentiments, Christine Reinhard, a vécu de nombreuses expériences qui l'ont fait percevoir de manière critique les réalités de l'espace roumain. La description de la cérémonie d'accueil du consul à la cour princière de Bucarest est à cet égard très intéressante. La femme du consul est très étonnée par l'atmosphère de la cour princière, bien qu'elle ait prévu qu'il y ait une grande différence avec les cérémonies existantes dans les monarchies de l'Europe.

„...[...] mais je ne m'avais pas attendu à croiser un pays comme un jardin, plein de volailles et de bœufs. Les salons étaient sales à l'entrée, obscurs, pleins de femmes mal habillées et ma pauvre traîne avait beaucoup souffert sur ces dalles-là, de mauvaise qualité. Je me sentais ridicule avec ma robe de soir dans cette salle-là, blanchie à chaux, dont les fenêtres étaient décorées aux rideaux et la seule parure était quelques miroirs...[...] Quand ils sont entrés dans la salle [...Monsieur Reinhard, accompagné par le grand maréchal de la cour] les princesses se sont levées aux pieds sur le divan et de là elles ont commencé à faire de grandes

révérences...Il m'a semblé difficile de ne pas rire au moment où elles ont commencé à encenser mon mari aussi. Cependant, j'ai été contente lorsque cette visite originale s'est finie, car elle m'a laissé une image curieuse sur les coutumes d'Orient“ (Holban, 1935, p. 200-201).

La différence entre ce à quoi elle s'attend de la cour de Bucarest et ce qu'elle y trouve conduit à une très grande déception. Rien n'est à son goût : la cour princière est pleine de volailles, les salons du palais sont sales et obscurs, les femmes de la cour sont habillées modestement, il manque l'opulence. A tout cela faut-il ajouter ses vêtements, choisis pour une cour impériale. Les révérences des princesses, trouvées sur les canapés, l'encensement du mari, ont provoqué des sourires à Madame Reinhard. Elle décrit tout cela avec une expression plastique *Les Coutumes d'Orient*. Nous n'avons aucune raison de s'en douter du récit de Madame Christine Reinhard!

A son tour, Joseph Rohrer, statisticien de formation, qui a visité la Bucovine et la Moldavie, décrit la manière dans laquelle il a été servi dans la maison de la famille Mavrocaordat de Iași. Il raconte le cérémonial de la cour princière où il a été mécontent de la qualité des produits et de la manière dont il a été servi.

„La manière dans laquelle on m'a servi là bas, en Moldavie, pour faire passer mon temps et la manière dans laquelle on a considéré qu'on me donne de la tranquillité n'a pas été facile pour moi. D'habitude, ce que l'amphitryonne ou la dame qui fait les honneurs de la maison à un étranger à la place de la femme du boyard m'a offert tout d'abord a été un jus de framboise ou de groseille à maquereau sur un petit plateau en argent duquel je pouvais manger avec une petite cuillère à café. Après, dans une tasse en porcelaine très petite il arrivait un café qui était en fait un sédiment épais et qui m'a coûté une grande maîtrise de soi. Ensuite, une fille de la maison m'a servi avec de l'eau et une autre avec de la liqueur et, finalement, la hôte m'a donné une pipe à long tuyau qui arrivait normalement jusqu'à mes pieds. Mon goût aurait tout supporté plus ou moins, mais il m'a semblé bizarre le fait que dans l'après midi la femme du boyard s'est brossés ses dent devant moi, le boyard s'est lavée sa barbe et moi, j'ai dû laver mes mains dans le même bassin qui était pour les trois. J'ai appris plus tard seulement que cette conduite vis-à-vis de moi représentait le plus haut degré de confiance et d'amitié“ (Călători străini, 2004, p. 154-155).

Si on laisse de côté le mécontentement du fonctionnaire autrichien concernant le cérémonial et les produits offerts au visiteur (le café était plutôt du marc, la pipe était gigantesque), on soulignera sa révolte lorsqu'il voit la manière de faire le nettoyage après avoir mangé, en utilisant le même bassin d'eau. Vu localement pour un signe de confiance, d'appréciation, une preuve d'intimité, c'était pour les occidentaux un manque de respect des normes élémentaires d'hygiène.

Il y a d'autres frontières culturelles et mentales également qui doivent être surmontées. Le même auteur raconte l'expérience qu'il a eue regardant les vêtements. Il est très contrarié par les goûts des boyards et des femmes des boyards de la Moldavie. Il sent le besoin de se différencier de ce monde dans lequel il reste peu de temps.

„Pour me différencier de la plèbe de ces endroits je me suis acheté à Botoșani une douzaine des ainsi nommés foulards de l'Inde de l'est. Au début je riais d'une manière ou d'une autre quand je voyais les femmes des boyards qui s'ornaient la tête à la maison avec des vrais bijoux mais elles portaient pendu des hanches un mouchoir triangulaire comme un tablier. A leur tour les femmes des boyards se riaient de moi car je portais mes boucles blondes poudrées à poudre blanche, ce qu'elles n'avaient jamais vu dans leur pays“ (Călători străini, 2004, p. 155). La mode est drôle des deux côtés, ce qui est à la mode en Occident peut se transformer en ridicule aux Portes de l'Orient.

L'auteur remarque un aspect important, celui du transfert culturel, des influences occidentales, en liaison avec le monde allemand. « Les vêtements allemands ne leur semblaient pas tellement étrangers, car il y avait plusieurs grecs de Botoșani et de Iași qui faisaient du négoce avec l'Allemagne et ils s'habillaient à l'allemande ». Bien qu'il parle des boyards grecs qui s'habillaient à l'allemande, il pouvait également exister des boyards autochtones qui faisaient du commerce avec le monde allemand.

Adem Neal, médecin de formation, a fait à son tour un voyage vers Constantinople, en traversant la Moldavie. Reçu en audience par le prince Alexandru Moruzi, le médecin anglais fait une courte description de la rencontre : « J'ai trouvé Sa Majesté en trônant sur son divan, entouré par les dignitaires de sa petite cour. Il s'est levé quand nous sommes entrés et il nous a souhaité, en français, la bienvenue en Moldavie, en nous invitant aussi à nous assoir à côté de lui. Il nous a offert des cafés, des pipes à long tuyau, du sorbet et des sucrés, d'après l'usage oriental» (Călători străini, 2004, p. 176).

L'auteur remarque dès le premier moment le fait que le cérémonial suit le modèle oriental. La scène est remplie des symboles ou des choses en provenant de l'Orient : le divan, la familiarité, le café, la pipe à long tuyau, le sorbet et les sucrés mais aussi le grec, le phanariote. Ceci crée une atmosphère spécifiquement orientale de sorte que l'auteur a l'impression que la Cour princière est la prolongation de l'Empire Ottoman.

En échange, les vêtements sont les mêmes dans le monde rural. Adem Neal remarque les suivants : les paysans moldaves qu'on rencontre de temps en temps en conduisant les charrues à bœufs de la plus primitive construction sont des gens d'une race âpre, sans peur, et simples. Ils sont habillés de vêtements blancs en laine

ou en tissu, ils portent des bonnets de fourrure de mouton et des semelles (*Călători străini*, 2004, p. 174).

Pour Vince Batthyány, en voyage en Transylvanie, la vue des villages roumains lui donne l'occasion de faire les constatations suivantes:

J'ai vu plusieurs villages roumains. Leurs maisons n'étaient pas tellement mauvaises et certaines pièces étaient décorées de serviettes blanches. Les habits de cette nation n'ont rien de spécial. Les roumains sont facilement reconnaissables d'après leurs visages secs et pâles, leur taille mince et la hauteur moyenne, mais également d'après leur agilité... Ils se trouvent sur une marche très basse (*Călători străini*, 2004, p. 98).

L'auteur saisit le statut politique des roumains, par rapport aux autres nations politiques de Transylvanie, statut qui a ses origines dans le fait qu'ils ont été conquis. Il remarque leur ardeur au travail, mais il déplore leur manque d'instruction. Pour lui, comme pour la grande majorité des voyageurs, les roumains sont les descendants des romans et ils parlent une langue d'origine latine. L'opinion de Christine Reinhard est la même aussi. La langue parlée et les noms des habitants conduisent à cette association. C'est alors un lieu commun.

A son tour, Guilleminot n'oublie pas de rappeler le fait que les habitants de ces pays «proviennent de la colonie romane fondée par l'empereur Trajan après avoir chassé les daces. Leur langue est une mauvaise latine, mêlée avec beaucoup de mots dénaturés» (Horga, Şipoş, 2006, p. 57).

Guilleminot est généreux au moment de décrire les moldaves et les valaques qu'il a rencontrés dans son voyage, manifestant une sorte de sympathie pour les habitants des deux provinces (Horga, Şipoş, 2006, p. 58). Il n'hésite cependant pas à transmettre à la postérité les défauts les plus communs des habitants. Dans ce cas aussi, il ne laisse cependant pas l'impression qu'il se rallierait aux critiques adressées aux Roumains. Il n'est toutefois pas aussi de tolérant devant les critiques des habitants des Principautés.

Daniel Clarke est vraiment enthousiasmé de la langue parlée par les Roumains, même si il donne parfois la sensation d'exagérer.

„Rien ne nous a semblé plus digne de prendre en considération que leur langue. Il ne suffit pas de dire qu'elle ressemble au latin : dans beaucoup de situations c'est du latin pur ; la différence entre notre manière de parler latin et la leur réside seulement dans la prononciation“ (*Călători străini*, 2004, p. 59).

En échange, Vince Batthyány, arrivé en Moldavie, a une opinion critique concernant les habitants de Botoşani, la grande majorité étant des Roumains. Selon lui, aucune personne ordinaire n'est apparue avec des traits nobles, des joues tendres ou des vêtements propres (*Călători străini*, 2004, p. 101).

Bien que la grande majorité des voyageurs remarque l'origine romane des Roumains et le fait qu'ils parlent une langue d'origine romane, aspect qui de

manière indirecte les rapprocherait à l'Occident, à la civilisation, est plutôt un aspect vu avec une perspective plus historique que contemporaine.

Les voies de communication représentent un autre aspect qui suscite de nombreuses considérations.

Daniel Clarke, par exemple, écrit les mots suivants : « En avançant dans les rues, nos carrosses étaient cahotés sans cesse et ils restaient durs car ils étaient tirés sur des troncs d'arbres et d'autres madriers rangés à travers la rue » (*Călători străini*, 2004, p. 60). Il continue ses considérations regardant le système de communication : « La vérité c'est qu'il est impossible à traverser ces ruelles autrement qu'on utilisant un véhicule et même de cette manière il est difficile à marcher au-dessus » (*Călători străini*, 2004, p. 62). Les chemins sont en si mauvais état qu'il est difficile à avancer.

De Perișani à Căineni la distance est de cinq heures par un défilé abrupt de montagne. Les forêts et les paysages de cette partie du passage sont absolument magnifiques, affirme Daniel Clarke. Bien que les chemins soient difficiles, le paysage est fascinant.

On trouve la même impression sur les chemins de la Transylvanie chez Christina Reinhard aussi. « Les chemins parcourus le lendemain ont été pire ; heureusement la beauté du paysage nous a aidé à mieux supporter la lenteur de la marche » (Holban, 1935, p. 190).

Pour Joseph Rohrer il y a des différences majeures entre la Moldavie et la Bucovine concernant le système de communication. Il y a une grande différence quand on compare la Moldavie, du point de vue de la construction des chaussées et des ponts et la Bucovine, trouvée en ce moment sous administration autrichienne. Pour Joseph Rohrer, une grande différence apparaissait sous l'Empire des Habsbourg entre la Bucovine et la Moldavie, concernant les voies de communication. En Moldavie les ponts manquent. De l'autre côté tout est ordonné, les chaussées et les ponts sont solides.

A Iași, Friederich Schmidt est mécontent des maisons et des rues. Par ci par là il y a des maisons et des baraques. Les rues sont pavées dans certains endroits, mais quand il fait mauvais la boue est abondante (Lemny, 1985, partie I, p. 172).

Pour Louis Allier de Hauteroche, il est impossible de se former une idée des chemins de toute la Transylvanie ; ils sont horribles, car la boue s'étend toujours jusqu'à l'axe (Pippidi, 1987, p. 120). Mais celui qui vient de l'ouest ou du nord n'est pas toujours mécontent concernant les conditions des Pays Roumains. Il y a des situations où les voyageurs qui entrent en Moldavie de la Pologne, comme le médecin Adam Neal, trouvent ici une certaine civilisation. « Après avoir habité les vieux logements juifs et slaves de la Pologne, le contraste affiché par l'étiquette d'un palais grec était aussi frappant qu'agréable » (*Călători străini*, 2004, p. 181).

De même, le diplomate français Louis Allier de Hauteroche remarque la différence de civilisation entre les zones du sud et celles du nord de Danube : « après avoir vu les taudis dans mon chemin au long de Danube, j'ai été surpris d'une manière agréable en entrant dans cette capitale, où j'avais peur que nos yeux ne voient des constructions aussi misérables que celles des quelques villages que j'avais rencontré » (Pippidi, 1987, p. 117).

Le régime politique

Pour Vince Batthyány la constitution et la situation politique de ce pays, la Moldavie, sont ici très claires. Le Prince donne ses audiences assis et la tête couverte, en même temps que les présents restent debout, très humbles. Lorsque les boyards se regroupent dans la salle, il reste seul dans son cabinet de travail. Ils n'osent pas demander la permission d'entrer, mais ils avancent doucement et ils se mettent dans les environs de la porte pour qu'ils soient observés et qu'on les appelle. Après, ils entrent, ils baisent la main du Prince et ils ne se sentent pas vexés lorsqu'il les frappe (Călători străini, 2004, p. 102). Mimer et reproduire les gestes de pouvoir s'étend du centre vers la périphérie. Ce qui se passe à Istanbul se reproduit à une autre échelle à Iași et à București. Le cérémonial du choix du Prince, les audiences, l'attitude du sultan vis-à-vis des Messieurs grecs, le comportement du Prince vis-à-vis des soumis, le cérémonial de la Cour, l'arbitraire viennent soutenir cette assertion.

Vince Batthyány remarque à Iași la situation suivante : du coucher de soleil et jusqu'à minuit, une torche brûle devant sa maison, comme dans le cas des sérails et chez le grand vizir. Tout cela porte la marque de la suzeraineté et des coutumes turques.

A son tour, Aubert considérait que les problèmes du pays n'ont rien à voir avec le potentiel économique, mais avec la mauvaise direction et l'administration, au sens large.

Pour Aubert, l'Empire Ottoman est coupable : « Le Gouvernement turc sera toujours un obstacle sur la voie de la correction du pays. Chaque année il reste avec plusieurs millions, en négligeant les ressources » (Horga, Șipoș, 2006, p. 34). En fait, le mal de l'Empire, surtout le despotisme des sultans et la corruption, avait contaminé et les provinces dépendantes, et les phanariotes qui représentaient les instruments parmi lesquels la Porte agissait dans les Etats roumains. Ensemble avec le sultan, ils étaient les promoteurs de la politique ottomane dans les pays roumains, les bénéficiaires de ce système néfaste et parfois ses victimes. En quelques phrases, l'observateur français surprend le fonctionnement du mécanisme politique de la Moldavie:

„D'habitude, la Moldavie est gouvernée par un prince grec, qui reçoit l'investissement de la part du sultan. Les intrigues et l'or sont les moyens les plus

sûrs en vue de l'obtention d'une principauté. Celui qui avait la soutenance de la Porte et de grandes richesses et qui a réussi à être nommé Prince, n'a rien de mieux à faire qu'exploiter son propre peuple ; il doit se couvrir des dettes immenses qu'il a été obligé de faire. D'ailleurs, il n'a aucune garantie. Les conspirations qui lui ont servi aujourd'hui à obtenir l'autorité suprême, demain peuvent le renverser» (Horga, Şipoş, 2006, p. 28).

Aubert n'est pas le premier à faire de telles considérations sur le régime phanariote. La grande majorité des voyageurs étrangers sont arrivés à des conclusions similaires.

Autrement dit, le trône de la Moldavie s'obtenait par des intrigues et de l'or. Les Messieurs, après avoir obtenu l'approbation du sultan, payaient de grandes sommes d'argent pour rester dans ses grâces et dans les grâces de hauts fonctionnaires ottomans, pour garder son trône plus longtemps. Le but de ses souverains n'était pas d'enrichir les fonctionnaires de la Porte, mais de s'enrichir eux mêmes et leurs familles. Collecter de l'argent des taxes payés par les fonctionnaires du pays pour leur propre usage était considéré une chose normale. De la même manière que la mentalité de l'époque conçoit que les Princes, après avoir perdu le trône du pays, restent avec des fortunes immenses obtenues du travail des soumis. Et un règne plus long signifie du pouvoir et plus d'argent. Ainsi on explique la préoccupation de ceux qui se trouvent sur le trône de garder leur position sur une plus longue durée, en dépensant des sommes d'argent pour éliminer leurs prétendants. L'observateur français remarque, de manière indirecte, la crise d'autorité de l'institution centrale, qui est devenue une simple fonction occupée par ceux qui sont disposés à offrir de grandes sommes d'argent. Le règne n'était plus au service du pays, ne défendait plus ses intérêts. Dans ce contexte, il était peu important que le futur seigneur ait des qualités de gouvernant et soit un bon administrateur. Pour le sultan le plus important était le fait que le prétendant qui offrait la plus grande somme d'argent pour l'occupation du trône du pays soit solvable. Mais le paiement effectué pour l'occupation du trône était suivi par d'autres obligations. La Porte encourageait les éventuels contrecandidats pour inciter ceux qui étaient à la tête du pays à honorer ses dettes. « C'est ce qui s'est passé avec le prince Canghieri, récemment nommé Prince dans la principauté de la Moldavie. Il vient d'être éliminé du trône et remplacé par le prince Canimaki » (Horga, Şipoş, 2006, p. 35). La vraie cause de la grave situation économique et politique des pays roumains était le système instauré par la Porte. Ceci est également démontré par la facilité avec laquelle les princes sont changés, parfois d'après le caprice des sultans ou des hauts fonctionnaires ottomans. Comme le confirme Aubert, « il résulte que celui qui pourrait entreprendre quelque chose pour ce pays, en supposant qu'il voudrait le faire, se trouve dans l'impossibilité de le faire» (Horga, Şipoş, 2006, p. 35). Le mal, la corruption, l'arbitraire de la Porte en

relation avec les princes phanariotes représentaient un véritable modèle à suivre, bon gré mal gré, par l'élite politique du pays. « D'après l'exemple des princes, les principaux boyards sont obligés d'exploiter les autres et il n'existe pour personne aucune sureté, ni propriété» (Horga, Şipoş, 2006, p. 35). L'absence d'une garantie minimale pour la sureté de la personne et de la propriété constitue donc un autre grand problème dans les pays roumains. Ceci entraîne l'arbitraire des puissants et un manque de confiance dans le système politique en vigueur, générant parmi la foule la méfiance, la peur et l'incroyance.

Guilleminot n'a aucune réticence à accuser l'élite des Principautés:

Regardant les riches et les importants, ils sont la grande majorité des lâches et des humbles devant ceux qui peuvent leur faire du mal ou leur protéger. L'intérêt et la peur sont les deux mobiles puissants qui conduisent leurs actions. Ils sont des conspirateurs, des comploteurs, des oppresseurs impitoyables des faibles, sévères avec leur soumis et tyrans dans leur propre maison. Enfin, ils possèdent tous les vices qui ont conduit vers la tyrannie sous laquelle ils sont soumis par leurs maîtres, les turcs (Horga, Şipoş, 2006, p. 51).

Peu nombreux sont les auteurs étrangers qui ont réussi en si peu de mots à surprendre les vices des puissants dans les pays roumains : aussi lâches et humbles se montrent-ils vis-à-vis des puissants, aussi intrigants et impitoyables sont-ils avec ceux qui leurs sont soumis. L'intérêt et la peur coordonnent leurs activités quotidiennes. Il n'est pas moins vrai qu'une telle élite a accéléré la dépendance des principautés vis-à-vis de la Porte et, par son comportement irresponsable, a contribué à l'aggravation du statut des Pays roumains. Malheureusement, ce présent contraste avec le passé mais également avec les ressources humaines et naturelles des Principautés.

Les voyageurs étrangers qui ont parcouru l'espace roumain ont été impressionnés par la variété des ressources existantes. En même temps, ils constataient avec surprise que les richesses n'étaient pas exploitées de manière efficace et que les habitants du pays, dans leur grande majorité des paysans, les principaux et peut-être les seuls producteurs de biens, vivaient dans une pauvreté difficile à décrire, méprisés et opprimés par l'élite politique du pays.

Conclusions

1. Les voyageurs étrangers remarquent d'abord que la frontière politique entre l'Empire Ottoman et celui des Habsbourg est fixée sur le massif des Carpates et non sur le Danube. À cette impression contribuent plusieurs facteurs. Tout d'abord l'existence d'une frontière militarisée, avec la douane, la quarantaine et l'armée. Une telle frontière n'existait pas entre les Pays roumains et l'Empire Ottoman. C'est-à-dire que, de ce point de vue, les Pays roumains semblaient faire partie de l'Empire Ottoman pour les étrangers.

2. Les frontières politiques n'étaient pas les seules à contribuer à cette image. Le système politique des Principautés, la présence des princes phanariotes, la façon de nommer le prince, l'achat du trône, la vente des dignités, l'autorité despotique du sultan, le cérémonial de la cour, la symbolique du pouvoir conduit les voyageurs à se sentir dans les principautés danubiennes comme dans l'une des provinces de la Porte. C'est vrai que les Pays roumains donnent l'impression d'être plus civilisés par comparaison aux régions du sud de Danube. Les voyageurs remarquent, toutefois, la différence de civilisation et prospérité entre la Transylvanie, la Bucovine, le Banat et la Valachie.

3. Le rapport entre le centre et la périphérie connaît d'importantes modifications, en fonction de ce qu'on considère comme centre. En fonction de celui-ci on établit la périphérie. La Transylvanie est pour les voyageurs étrangers à la périphérie du monde civilisé, si l'on compare avec la France. Mais en relation avec les Pays Roumains, la province intra-carpatique est le centre, étant, selon la plupart des voyageurs, dans une position de supériorité vis-à-vis des Principautés danubiennes.

4. Il y a, aussi, des frontières mentales, issues des réalités et des sédiments historiques accumulés pendant des siècles, sur lesquels se superposent les expériences personnelles. Pour les voyageurs qui traversent l'espace roumain, l'expérience de ce voyage, le contact direct avec les chemins et les lieux de repos, l'image de l'élite politique (depuis ses vêtements, jusqu'à son comportement, ses gestes et son origine), donnent l'impression que les Pays Roumains font partie de l'Orient.

5. Les voyageurs découvrent aussi dans les Principautés une série d'éléments rapprochant cet espace de l'Occident: l'origine de ses habitants, la langue qu'ils parlent, les vêtements des paysans qui ne sont pas contaminés par l'influence de l'Orient, n'étant ni Occidentaux, ni Orientaux, l'instruction des boyards grecs. La plus forte séparation se trouve pourtant entre la Transylvanie et les principautés roumaines extra-carpatiques.

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**CULTURE, LITERATURE, ARTS, AND INTERETHNIC
COLLABORATION AT THE WESTERN BORDER OF ROMANIA. CASE
STUDY: THE “CELE TREI CRIȘURI” ROMANIAN CULTURAL
REUNION IN ORADEA (1919-1940)**

An obvious priority to current Romanian historiography has become the research and recovery – through studies, scientific works and books – of regional history, in order to comprise the constitutive and particularising elements in the wider context of national and ultimately universal history. Thus, the concern to reconsider certain aspects significant to this history is a scientific and compulsory duty for education and research institutions in different provinces of the country. Hence, our commitment to this study envisaging to recover aspects from cultural life as it happened in the interwar western part of Transylvania.

Cultural meetings and reunions are defined by specialists as spiritual and social places that facilitated mutual understanding, exchange of thoughts and cooperation between people of different social and cultural origins, emphasizing the role of diversity, both locally and nationally. They were also considered a catalyst for modernization and their representants were regarded as promoters of the "New", their actions being the dynamic factor of the local spiritual life.

At the end of the 19th and the beginning of the 20th centuries several Hungarians cultural societies, associations and reunions had functioned mainly in urban milieu. Thus, we may mention the *The Hungarian National Casina of Bihor County (Bihari Nemzeti Kaszinó)*, founded in 1833, *The Civic Circle Society (Polgári Kör)*, founded in 1868, *The Society of Archaeology and History of Bihor County (Biharmegyei Régészeti és Történelmi Egyesület)*, founded in 1872, *The „Szigligeti” Society (Szigligeti Társaság)* founded, under the presidency of Rádl Ödön, in 1892, *The "Ady Endre" Society, 1919*, *The Association of Beauty Promoters (Szépítési Egyesület)*, founded in 1883, *The Friends of Music Association from Oradea (Nagyváradai Zenekedvelők Egyesülete)*, founded in 1890, and so on (Tóth, 1981, p.182-189; Borovszky, 1901; Romînașu, Cioca, 2013, p. 57-65).

Such an initiative is associated to others in Transylvania and Western Romania due to which we have access to more professional information on the role of the cultural associations in promoting the culture and in promoting and strengthening interethnic collaboration through the cultural act.

The interwar spiritual background has also turned into a fertile source of research, which is fully justified, as it makes up the most productive stage of the Romanian culture, art and science. We speak of a distinct historical time with defining particularities and

elements, when the Bihor County as a western area of Romania was integrated in the common flow of national culture, a reality to which both people and institutions contributed in an ardent urge towards progress and European synchronisation, an unprecedented phenomenon in our history. It is the period when several Romanian cultural societies and reunions were founded.

As some contemporaries pointed out, the idea of establishing a Romanian cultural reunion at the western border of the country was conceived in Iași as early as 1917, when some intellectuals belonging to the Romanian army expressed their wish to organise brief cultural-artistic moments. They were implemented only partly, as there were no optimal conditions for such endeavours since the war marked a decisive imprint on the human activity overall. Nevertheless, they turned to the local theatre stage with the curtains closed. In such atmosphere, some recited poems, while others performed sketches. Artistic performances had the artillery Colonel Gheorghe Bacaloglu, who played the violin and was a good organiser. At each and every concert, he discussed with his comrades on the need for cultural development of the country in the aftermath of the military hostilities.

In Oradea, the old ideals of the Colonel were finally crystallised against an intricate background: the establishment of a Romanian cultural reunion “acting to awake the Romanian awareness... by going beyond the trifles and troubles of everyday life and by enriching the soul in what it can have deep inside” (Bradu, 1974, p. 171). Consequently, on the 21st of October 1919, George Bacaloglu introduced the text of the programme of the future Reunion in a public meeting attended by numerous intellectuals. It explicitly showed the most eager cultural desiderata of the people in Bihor. The document we refer to stated that Romania was seized by manifold changes justly laying stress on cultural development and education of the masses that had to be guided “on solid ground, as they are the milestone of our existence as a civilised people aware of our mission... So, each corner of the country has a holy duty to contribute... to achieve tight intellectual and spiritual links between all sons of our people”.

With the support of the most representative intellectuals, the Reunion intended to bring a significant Romanian cultural activity in the western areas (Banat, Crișana and Maramureș) (NA-BCO Brusturi, f. 260; Faur, 1982, no. 5, p. 50-51).

The participants to the meeting were aware that the moment would be a significant event in the cultural life of the region, when they laid the bases of a Romanian cultural reunion with a clear-cut objective: culturalisation “of the most backwards regions of the country” (Bradu, 1974, p. 170).

The adhesion of the intellectuals from Bihor to the Programme can be obviously inferred from the minutes of the meeting: “We, Lucia Zigre, Colonel Elia N. Batar, Elena Horvath, Valeria Lazăr, Prefect Zigre, Bishopric Vicar Ciorogariu, Archpriest Andrei Horvath, Aurel Lazăr, Livia Cosma, Gheorghe Tulbure, and Colonel Bacaloglu... meeting today, on the 21st of October 1919, at the Prefecture of the County and taking note of the Programme of Mr. Colonel Gh. Bacaloglu, Commander of Regiment 33 artillery, referring

to the organisation of the intellectual, cultural and social action of the County of Bihor and of the city of Oradea, vividly welcome it as according to our great needs and lay the bases of an action committee of the Great Assembly named 'Cele Trei Crișuri' (NA-BCO Primăria, dos. 10/1921, f. 77).

The action initiated by George Bacaloglu was encouraged by the Romanian intellectuals in areas neighbouring Bihor. Thus, in a letter dated 23 March 1920, the university professor Gh. Bogdan-Duică from Cluj encouraged him in his endeavours to spread culture amongst the Romanians at the western border of the country, where spiritual life of minorities was well represented as follows: "We have the duty that you so well understood to forcefully support the Romanian culture... Competition will be admitted by everybody. So our area will be an area of culture competition!... The first line of the cultural trenches will cross Caransebeș, Timișoara, Arad, Oradea, Careii-Mari, Satu-Mare, and Sighetu-Marmației. Oradea will fall right in the middle: three cities to the right, three to the left. It seems to be predetermined to concentrate the leadership of actions in the cultural competition area... These seven centres have to work together as cultural border rangers; they need to agree on the actions to be taken..." (CTC, 1920, no. 1, p. 26).

In his answer, George Bacaloglu underlined the need to combine the cultural endeavours at the border of the country. In the Colonel's opinion, an important role was played by Cluj. The leader of the Reunion briefly presented the cultural situation in Bihor when he came to Oradea (in October 1919): "The cultural range made of the seven support points on the border with Cluj as backup,... is an idea worth drawing attention. As early as my arrival in Oradea,... I was thinking of such an issue in the cultural area relating to the settling of the new border... The result of this regional labour has been rich, the ripe attractive fruit has been thrown in Bihor and Cluj got it" (CTC, 1920, no. 2, p. 28).

The importance of the action developed in Oradea was also pointed out by I. Simionescu as follows: "More than once I have sought to display the great merit of those who, with a lot of work and perseverance, try to create healthy cultural nuclei in different centres in the country... The energies, otherwise threatened with complete numbness, find their activity field useful to the people. The fight is harder... The merit of those doing it skilfully and patiently, with the conviction of the good deed..." (CTC, 1931, no. 5-6, p. 75).

George Bacaloglu had the intellectual and moral strength to settle a cultural reunion at the western border of the country, as he came from a prodigal family in the cultural and spiritual life. During a conference, Victor Babeș pinpointed the main milestones in his career: "The Bacaloglu family gave this country several intellectuals, distinguished scholars... Colonel George Bacaloglu, who was born in Bucharest in 1877, successfully graduated from military and special schools of Engineering and Artillery... During the war, he fought in the Danube Army, at Mărășești and in Bessarabia... In the year 1919, he left the position as Director of the Artillery in the Ministry of War and was

appointed to organise and command the new Artillery Regiment established in Oradea... then in Cluj. In this position, and that of Prefect of the Bihor County, he got in contact with important people in Ardeal and with the soul of the people in Ardeal as well. His leaving the army was exclusively owed to a need of the soul to broaden the range of his activity on his national land. He gave up an achieved career not to cast shadow on a past or to have material advantages, but to open a new path to strengthen the Romanian soul... He helped the others in their needs and special fights and kept to himself the seemingly harder and more modest task to establish the “Cele Trei Crișuri” in parallel with “Astra”, a brand new cultural action at the early times of the annexation of the new provinces according to the issues of the time; he knew how to make himself loved and provide an example of peaceful spirit with minorities, without sacrificing anything from the national patrimony... With his soul, he established the Romanian culture institution named “Cele Trei Crișuri” after the three rivers crossing the Apuseni Mountains and the Ardeal in Oradea” (NA-BCO Reuniunea, dos. 3, f. 82-83).

From the point of view of our work, particularly interesting are Eugeniu Sperantia’s statements on the cultural initiative promoted by the “Cele Trei Crișuri” Reunion. He emphasised the endeavours of the local intellectuals grouped around George Bacaloglu to strengthen the culture at the western border of the country as follows: “We directed our work in three directions corresponding to immediate needs: propaganda in the countryside, propaganda in towns and cities and connections with minorities through culture. We never hesitated to achieve this initial plan guiding us; no sacrifice was spared on our way during the clear following years. Several varied events organised were known both in the country and abroad” (Sperantia, 1970, no. 4, p. 17).

The statutes of the Reunion comprised twenty-nine articles shown in their final version during a meeting of the leaders of Bihor on the 4th of November 1919: “Today, on the 4th of November, we the undersigned gathered in the chambers of the Prefecture of the Bihor County have listened to the statutes of the “Cele Trei Crișuri” Great Reunion drafted according to our advice by Colonel Bacaloglu, Commander of the 33rd Regiment of Artillery in Oradea and we voted for it unanimously. They were previously studied and approved by an elected commission made up of Mr. Prefect Dr. Nicolae Zigre, Dr. Aurel Lazăr, Dr. Gh. Tulbure, Dr. Miculaș, Colonel Nicolae Batar, Colonel Gh. Bacaloglu. We also sign our adhesion as founding members of the “Cele Trei Crișuri” Great Reunion, i.e. Bishops Dimitrie Radu and Roman Ciorogariu, General Constantinescu, Dr. Zigre, Prefect, and his wife, Dr. Iacob Radu, Gh. Tulbure, Dr. Aurel Lazăr, Dr. Gh. Miculae, Dr. Gh. Roxin, Dr. Justin Ardelean and his wife, Dr. Emil Fildan, Iosif Diamandi, Dr. Sever Andru, Dr. Elena Pteancu, Colonel Batar, Colonel Stănescu, and Colonel Gh. Bacaloglu” (NA-BCO Primăria, dos. 10/1921, f. 78).

In the year 1920, the statues were published in the pages of the *Cele Trei Crișuri* magazine. They were printed and disseminated in a brochure edited as early as 1919. Their publication had represented a substantial contribution to learning and direct

knowledge of the issues tightly related to the militant character of the Reunion. This is how, during the establishment session in October 1919, there were several opinions and proposals referring to a large dissemination of the statutes project. The alterations imposed by the speakers referred to some specifications on the objectives envisaged, on the duties of the members, and on the actions to co-opt the towns and villages inhabitants etc. (Bradu, 1974, p. 172-173).

If the first two articles of the statutes introduced the (“cultural, educational and social”) character and the head office (“Oradea, with branches in the main centres in the county”) of the Reunion, the following article stipulated its aim “*to strengthen the intellectual and spiritual connections between the sons of our people in the countryside and in the cities and to spread the friendly and affable influence on people belonging to any nation who are eager to live a peaceful and fruitful life to reach the strengthening of social life as much as possible*” (Marea Reuniune CTC, 1919, p. 3).

The trend of the Reunion to “spread its friendly and affable influence on people belonging to any nation” was a sign of maturity rejecting any ill-faith expression towards the other minorities right from the beginning.

From an organizational point of view, the Great Reunion was working through three sections extensively described in the fourth article of the statutes. The first was the Permanent Art Exhibition “Crişul Alb” (The White River) to which the Bucharest branch of “Amicii Muzicii” (Friends of Music) was associated. Actually, it was a permanent exhibition of painting, sculpture, caricature, sewing, national costumes, embroideries and decorative art pieces. Besides pieces exhibited by local artists, the society had the opportunity to admire works belonging to artists from other areas of Romania and from other countries in Europe (Marea Reuniune CTC, 1919, p. 4). Obviously, due to these stipulations, the Reunion tried to contribute to cultural approach of all artists for a unitary collaboration within national culture through this section, irrespective of their nationality (CTC, 1928, no. 11-12, p. 183).

Besides these exhibitions, the Reunion organised a series of “music sessions with local artists or coming from the country and abroad irrespective of their nationality” (Marea Reuniune CTC, 1919, p. 4-5) to complete the atmosphere of cultural effervescence.

Civil society was informed on the cultural concerns of the section through the *Cele Trei Crişuri* magazine. Calls in local press were mainly directed to highbrow society with a certain artistic education. The magazine read the following: “This artistic section will also be concerned with encouraging the existing music associations... with developing the singing, organizing concerts, meetings and conferences to promote national music” (CTC, 1928, no. 1, p. 33-34). Other objectives referred to organising a music library to inventory valuable works by important composers, setting up a scene for arts exhibitions and granting study scholarships to young talents.

The second component of the Reunion was the propaganda section named “Crișul Negru” (The Black River). It focused on publications, libraries, conferences, social soirees, theatre performances, cinema etc. It particularly focused on opening libraries and schools they equipped with books. The section aimed at initiating cultural contacts with as many important cultural centres in the country as possible. An important role belonged to the relations with the capital (Marea Reuniune CTC, 1919, p. 4). The aims were envisaged particularly in the towns, where an active cultural action started in consensus with the new realities promoted by the interwar society (CTC, 1928, no. 11-12, p. 183).

As a section of the Reunion with branches in different rural and urban localities in the county, the National Houses “Crișul Repede” (The Fast River) corresponded to the cultural propaganda in the countryside. It aimed at later spreading publications dedicated to people in the countryside, building their own settlements where they could organise different cultural events, such as: celebrations and folk dances, contests on different topics, theatre performances and films, agricultural and ethnographical exhibitions, and so on. Thus, they aimed at providing a connection between the rural and the urban population, encouraging labour, developing the Romanian traditional art etc. (Marea Reuniune CTC, 1919, p. 5-6). The *Cele Trei Crișuri* magazine inventoried a series of cultural priorities that had to be set up in the interwar countryside in Bihor through these National Houses: organising popular libraries, creating lecture rooms, delivering conferences in the field of sanitary education, building hospitals etc. Finally, these settlements were to become centres to spread the Romanian culture and “a meeting place for the rural community in a region...”

The whole activity mentioned above was initiated by the leadership of the Reunion made up of active presidents of the committee (the Greek-Catholic Bishop Demetriu Radu, the Orthodox Vicar Roman R. Ciorogariu, Commander of the 27th Division, General Marcel Olteanu), vice-presidents (Section I – Colonel George Bacaloglu, Section II – Dr. Aurel Lazăr and Colonel Nicolae Batăr, Section III – the County Prefect, Dr. Nicolae Zigre), and members of the central committee (Aurel Bârsan, General Constantinescu, Viora Ciordaș, Livia Cosma, Dr. Egry, Alexandra Gera, Andrei Horvat, Dr. Gh. Miculaș, Aurelia Pop, Cornelia Popa, Dr. Nicolae Popovici, Dr. Alexandrul Pteancu, Dr. Stan Florian, Colonel Teodor Stănescu, Colonel N. Trușculescu, Gh. Tulbure, Amelia Vulcan, and Secretary General Dean Gheorghiu) (CTC, 1920, no. 1, p. 34-35).

The cultural reunion was acknowledged as a legal entity in the year 1923. It was made public in the pages of the magazine edited by the Reunion rendering the great joy caused by the important event as follows: “The Official Journal no. 143 dated 29 September 1923 publishes the Royal Decree no. 4484 due to which the cultural Reunion “Cele Trei Crișuri” for culture [...] is acknowledged as a moral and legal entity. After four years of fruitful work for the welfare of the people in border regions, [...], we are happy to inform the great public on this high establishment of this institution. To us, it will be a

new urge for work and sacrifice for the welfare of our Romanian nation and of our united country” (CTC, 1923, no. 9, p. 148).

In Bihor, the Reunion did not start in a virgin area from a cultural point of view. Before 1918, there were some cultural associations, such as “Societatea de lectură” (The Reading Society) in Oradea, the Romanian *casina* in Bihor, the local branches of *Astra*, etc. Their objective was the cultural development of the Romanian population. Their experience was used in the cultural action initiated by the new similar bodies established in the interwar period. Thus, a genuine cultural movement was outlined at the western border of the country aiming to promote the cultural act in different social media (Bradu, 1974, p. 175).

Undoubtedly, the Great Reunion best expressed in the editorial context in the interwar Bihor through the *Cele Trei Crișuri* magazine that became its cultural propaganda body once it was published (on the 15th of April 1920). The manager, George Bacaloglu, stated his intention to place the magazine along the tradition of the *Familia* (The Family) edited by Iosif Vulcan (Faur, 1970, p. 101).

Right from the beginning, the publication introduced its cultural creed to the readers: “In such hard times for the daily increasing needs and problems, the *Cele Trei Crișuri* magazine will pursue its Romanian and Latin activity to further impose the awareness of a fulfilled work, of an achievement that is more and more needed each day” (CTC, 1936, no. 3-4, p. 55).

The perseverance with which George Bacaloglu led the *Cele Trei Crișuri* turned it into an elite magazine highly appreciated both nationally and internationally. They approached many different topics. They published historical and literary articles completed by illustrations depicted from daily interwar life and from the Romanian landscape. They did not ignore political, social and cultural events developing in the country and abroad gathered under the title “Noutățile zilei” (Daily News), the publication of different cultural magazines in Romania, books printed by Romanian and international publishing houses, all the information being analysed and commented in a balanced professional spirit (CTC, 1923, no. 9-10, p. 155).

Each issue of the magazine focused on a certain topic developed and supported through articles signed by writers from all over the country. This is how a spiritual emulation grew to the benefit of both the population in the region at the western border and in the whole country (CTC, 1931, no. 5-6, p. 75).

The editorial committee first comprised some personalities willing to refresh the cultural atmosphere in Crișana. The names of the initiators (Roman R. Ciorogariu, Gh. Bacaloglu and Al. Pteancu) were one with the fate of the magazine.

During its two decades of existence, there were two distinct periods. The first was from 1920 to 1933, and the latter developed from 1933 to 1940. The magazine was published in Bucharest from January – February 1941 to March – April 1944. As of 1933, the magazine bore the imprint of the change of its profile into *Anale culturale* (Cultural

Annals), as the columns specialised in topics requiring only highly professional interventions. Nevertheless, literary fragments and popular poetry was still published from 1933 to 1940.

Definitely, the upsurge of the magazine took place during the first stage. In a very short time, the number of collaborators became impressive. We will further enumerate only the best-known names in the cultural life of the time: Lucian Blaga, Ion Agârbiceanu, Mihail Dragomirescu, Eugen Lovinescu, Gala Galaction, Victor Eftimiu, Cincinat Pavelescu, Emil Isac, Emanoil Bucuța, and Constantin Rădulescu-Motru. Besides them, there were also local collaborators, such as Aurel Lazăr, Eugeniu Sperantia, Gh. Tulbure, Gh. Ciuhandu. Thus, the magazine acquired the image of a field where ideas and artistic formulae, where opinions confronted in a balanced manner.

In the year 1933, the publication reached its climax, although the previous year it had been printed in Craiova, which involved some editorial issues. Other prestigious names appeared in the magazine, such as I. Al. Brătescu-Voinești, Gh. Bogdan-Duică, I. Bianu, Ovid Densușianu, D. Gusti, Cezar Petrescu, Sextil Pușcariu, Ion Pillat, George M. Zamfirescu, Elena Farago etc. (Horj, 1970, no. 80, p. 2; Hangiu, 1987, p. 74; Antonescu, 2001, p. 42). Right from its establishment, the Reunion acted to draw writers from all over the country towards its most important publication, *Cele Trei Crișuri*. This can be seen in a document issued on the 16th of September 1920 and sent to the officials in Bucharest that showed the wish of the cultural society in Oradea to promote all writers in the country (Bieltz, 1987, p. 353-355).

Consequently, writings came from different areas of the country. They belonged to different literary genres, as follows: novellas, stories, poetry (even the poet Alexandru Macedonski sent one of his poems), together with popular songs, articles on geography, history, literary criticism, philosophy, technique, and medicine. The cultural information in the country was gathered in suggestively entitled groups, such as *letters from Banat, from Maramures, from Salaj* and even *from Bucharest*, chronicles from Satu-Mare etc. (NA-BCO Reuniunea dos. 23, f. 220; Antonescu, 2001, p. 41).

The mail proposing a poem or an article was generally simple, yet suggestively drafted. For instance, I. N. Pârvulescu from Pitești wrote: “I send these lines to your magazine, trying to restore the connections with literary publications ...” (NA-BCO Reuniunea dos. 23, f. 231).

The magazine also received announcements from other cultural societies or museums wishing to inform the public in a certain area of the country on the events they intended to organise. They sent the memos considering that the magazine could also make some cultural propaganda in their favour, so that the public might have been tempted to participate to meetings, conferences, or exhibitions, envisaged by those societies. On the 22nd of January 1925, the magazine received an item of information presenting the organisation, the inventory and the locations of the National Military Museum in Bucharest. All Romanians were invited to visit it in Bucharest and in its locations in the

main cities of the country: Timișoara, Oradea, Cluj, Sibiu, Cernăuți, Chișinău, Iași, Craiova, and Constanța. Being an efficient tool for education, the *Cele Trei Crișuri* magazine recommended the Romanians to visit the museum, as it “evokes our past...” (CTC, 1925, no. 2, p. 37).

Gaining more and more enthusiasm and grasping the readers’ need for culture, the magazine established an editorial office in Bucharest (18, Royal Street). This is how they managed to acquire a faster connection to the cultural life of the capital. Hence, the magazine shortly reached Cernăuți and Chișinău (CTC, 1937, no 7-8, p. 152). Articles signed by the most authorised names depicted fragments of life throughout Bukovina and Bessarabia (CTC, 1937, no 7-8, p. 152).

In a relatively short time, *Cele Trei Crișuri* managed to become one of the most evolved magazines from the point of view of the content and form not only in the country, but also abroad. The magazine aiming to strengthen the spiritual life at the western border of the country embraced issues of the fate of the Romanians abroad and particularly of the Romanians in Transnistria. The publication spread its influence in that region as of 1928 first due to the local socio-political factors preventing a normal development of the Romanian cultural life (CTC, 1937, no. 11-12, p. 238-239).

There was an ever stronger need for a more energetic collaboration of all Romanian publications to synchronise the endeavours to promote culture. A notable initiative belonged to the *Ilustrația* magazine in Bucharest that turned to George Bacaloglu on the 6th of March 1926 in the following way: “Dear confrere... we propose an exchange between our magazines as follows: we will publish the summary of your magazine in our column on “Bibliografii” (Bibliographies) in each issue of our magazine and we are kindly asking you to print the one we are sending you as well” (NA-BCO Reuniunea, dos. 1, f. 116).

Another similar call came to the editorial office of the magazine from the weekly publication *Radio-România* on the 9th of June 1926. The memo sent to the management stated that the Romanian station was neglected as compared to the radio stations in other European countries: “To partly remove this shortcoming, we suggest an exchange between our magazines asking you to extract from *Radio-România* everything you consider your readers may be interested in... We hope that due to this kind collaboration we can arouse the interest of the public in the radio that, far from being a mere entertainment, it is a social and national need nowadays ...” (NA-BCO Reuniunea, dos. 1, f. 3).

On the 28th of January 1926, another offer for cultural collaboration came from a Czechoslovakian press agency in Prague that had branches for the countries in Central Europe and the Balkans. They also had a Romanian branch established on the 15th of November 1925 that edited a daily newsletter for the Romanian newspapers. The newsletter was sent to the *Cele Trei Crișuri* magazine starting with the first issue. The same branch collected news on the Romanian propaganda in the Romanian newspapers that were subsequently published in foreign countries press. The press agency requested

“the newspaper (magazine – AN) on a regular basis” (NA-BCO Reuniunea, dos. 1, f. 3) with this aim in mind.

At times of financial crisis endangering the existence of cultural magazines, the solidarity of the Romanian cultural factor stood out. For instance, the management of the city of Galati granted the magazine a financial support to the amount of 20,000 lei in the year 1924. The publication had printing problems in 1921 too. As the magazine *Ideea europeană* informed, the question of moving to Cluj rose, yet it had to remain in Oradea. In the year 1927, George Bacaloglu had to ask the City Hall of Targu Mures for subsidies. The response of the financial unit of the city was prompt: “... Considering the results of this magazine and its eight year old reputation, we have decided to grant a subsidy amounting to 2,000 lei ...” (NA-BCO Reuniunea, dos. 1, f. 45; Ajutor, 1924, no. 23, p. 3; Antonescu, 2001, p. 39).

In a similar situation, George Bacaloglu wrote a letter to the President of the Production and Consumption Cooperatives at the Ministry of Labour, Cooperation and Social Security asking to support “this Reunion from a material point of view to be able to pursue its work to the welfare of our people”. The support could be either subsidies, or subscriptions to the *Cele Trei Crișuri* magazine (NA-BCO Reuniunea, dos. 1, f. 8).

All these wants and passes were overcome at the price of several sacrifices. The Reunion kept standing out in the Romanian cultural field. Thus, on the 60th celebration of the *Universul* newspaper, the magazine and the Reunion sent a congratulation telegram to the oldest Romanian daily newspaper as carrier and animator of our ideals (CTC, 1933, no. 5-6, p. 71).

The magazine was as “sensitive” with the Romanians’ supporter in the United States of America and Canada on its 30th celebration in 1935. Animated by this festive event, the magazine dedicated a special issue to the Romanian newspaper *America* (CTC, 1935, no. 7-8, p. 114).

In the field of cultural life, the magazine organised a literary creation (novella) contest entitled “Premiile noastre” (Our Prizes) in the year 1924. It involved further financial sacrifices amidst the material hardships seemingly insurmountable. Still, the magazine expected with great interest the creations of contesting writers who had the chance to state and achieve a cultural emulation at the western border of the country. The winner of the first place was granted 5,000 lei, the second 1,000, and the third 500 lei. In order to get closer to the Hungarian culture, the editorial office granted three prizes to the amount of 1,000 lei each for the translation of the awarded novellas into Hungarian (CTC, 1924, no. 10, p. 1).

The reading committee received 56 manuscripts, which overcame the expectations of the initiators. The first prize was taken by the novella “Biata Juliska” (Poor Juliska) by Maria Staiculescu, while the second place was taken by three novellas: “Dureri înăbușite” (Restrained Pains) by Dem. Gălman, “Blestemul” (The Curse) by Alexandru Mănciulescu,

and “Amăgiri” (Delusions) by Alice Gabrielescu. Other twelve manuscripts were selected for publishing.

The enthusiasm of the contestants to this mobilising action is shown by the words of one of the winners as follows: “...the gesture of your magazine is invaluable, even more because you provided young talents with the opportunity to come to the foreground and you had the content of being the initiators of this contest, of a beautiful understanding of our time” (NA-BCO Reuniunea, dos. 7, f. 6).

The international press acknowledged the efficiency of the activity of the *Cele Trei Crișuri* magazine on a national level. Following the articles dedicated to international events, the opinions of the foreigners after sixteen years of activity raised to the occasion: the bookstore *Plon* from Paris requested in a letter a publication exchange and expressed their wish to tighten the relations with the magazine and cultural institution in Oradea; the newspaper *Il Messaggero* from Rome showed in an article the propaganda of the Reunion to spread the Italian culture in Romania. In its turn, the University of California (Los Angeles) requested the magazine in the United States of America and stated their wish for a collaboration between the two institutions (CTC, 1935, no. 7-6, p. 116).

In order to argue the attitude of the international press, we will further review some significant titles present in several issues of *Cele Trei Crișuri: România și Societatea Națiunilor* (Romania and the Nations Society) in Romanian and French, *Franța și România* (France and Romania) in Romanian and French, *Pro-latio Congresul Presei Latine* (Pro-latio, the Congress of the Latin Press) in Romanian, French and Italian, *Basarabia. Un deceniu de la Unire* (Bessarabia. One Decade after the Union) (1918-1928), *Dobrogea. Semicentenarul ei* (Dobrogea. Its Semi-Centennial) (1878-1928), *România de peste hotare* (Romania Abroad), *Probleme culturale* (Cultural Problems), *Arta românească* (The Romanian Art), *Umorul românesc* (The Romanian Humour), *Femeia română* (The Romanian Woman), *Aspecte de vară* (Summer Aspects), *Teatrul românesc* (The Romanian Theatre), *Două centenare: Romantismul și Mistral* (Two Centennials: the Romanticism and Mistral), *Aspecte ale spiritului contemporan* (Aspects of the Contemporary Spirit), *Nuvela românească* (The Romanian Novella), *Privire asupra literaturii române* (Overview of the Romanian Literature), *Crăciunul și datinile românești* (Christmas and the Romanian Traditions), *Armata noastră (tineretul)* (Our Army (The Youth)), *Un an de la Restaurare (închinat M.S. Regelui Carol al II-lea)* (One Year after the Refurbishment (Dedicated to His Majesty King Charles II)), *Căsătoria Domniței Ileana. Istoricul Castelului Peleş* (The Marriage of Princess Ileana. History of the Peles Castle), *Congresul Interparlamentar. Parlamentul poparelor* (Inter-Parliamentary Congress. The Parliament of the Peoples), *Diferite limbi* (Different Languages), *Aspecte de la Congresul interparlamentar* (Aspects of the Inter-Parliamentary Congress), *Sărbătorirea d-lui Goga* (Celebration of Mr. Goga), *Pagini literare și de artă dramatică* (Literary and Dramatic Arts Pages), and *Curente politice europene. Masacrul de la Nistru*

(European Political Movements. The Massacre of the Dniester) (CTC, 1934, no. 3-4, p. 40).

We also have to mention the special issues dedicated by the magazine to the Latin and Inter-Parliamentary Congress, to France, to defence, to the Romanian theatre, to the Romanian exhibition and pavilion in Paris, and to other cultural events (CTC, 1938, no. 3-4, p. 77).

The Reunion was highly commended. Several political and cultural personalities during the interwar period visited the main office of the Reunion and of the *Cele Trei Crișuri* magazine as an acknowledgement of the role the cultural institution in Bihor played in the Transylvanian and national culture. Some of the important guests were the following: Alexandru Vaida-Voevod, Constantin Angelescu, Nicolae Iorga, Gh. Crișan, Ștefan C. Ioan, Gh. Bogdan-Duică, Victor Antonescu, Iosif Pop, Titu Constantinescu, Maria and Cella Delavrancea-Lahovary, C. Naumescu, the members of a Czechoslovak choir, C. Bacaloglu, etc. (CTC, 1935, no. 1-2, p. 40-41).

The magazine was also criticised. For instance, the publication *Ideea europeană* mentioned that some mediocre books were too praised. D. Tomescu expressed in the magazine *Ramuri* his dislike of the cultural programme initiated by the Reunion. Colonel G. Bacaloglu was also criticised by other magazines for his cultural actions that, according to them, turned into a personal business of the leader of the Reunion (Antonescu, 2001, p. 47-48).

As early as March 1922, the Romanian culture came closer to the Hungarian one due to the *Cele Trei Crișuri* magazine. At the beginning, there were only isolated facts ending with mutual translations belonging to both literatures (CTC, 1922, no. 15, p. 239).

A concrete step favouring the cultural collaboration between the Romanians and the Hungarians was the establishment of a society for writers, journalists and artists of all kinds irrespective of their nationality. Its aim was to know the literature of the two peoples by mutual translation and by the establishment of a common club to organise weekly conferences debating on different historical, literary and cultural problems specific to the time.

The statutes were voted in a General Assembly. A local committee was voted by secret vote. Iren of Pálffy and M. G. Samarineanu, the initiator of the idea, were appointed active presidents (CTC, 1922, no. 5-6, p. 96).

One of the major objectives for which the association pleaded was reached in December 1922, when a literary, artistic, theatrical and social magazine named *Aurora* was edited in Oradea as a bilingual Romanian – Hungarian edition. It aimed to publish “as many translations as possible from Romanian into Hungarian and vice-versa”. G. Bacaloglu, the author of the programme-article, considered that “in this way, the two nationalities will shortly get to know each other”. At the same time, “Aurora will closely watch all literary and artistic moves on both sides by publishing articles, chronicles and rich reviews on the Romanian and Hungarian art and theatre. Besides, our magazine is

also concerned with social life and seeks to provide a better peaceful guidance in the new society of our state through most competent people” (Bacaloglu, 1922, no. 1, p. 1). The enthusiasm of the initiative can be found right from the first issue: “... We move forward... We are young, but we are the offspring deriving from the common trunk of Eminescu and Petöfi. From the roots of this trunk shall we feed for both peoples. Convinced of the meaning of this time, we faithfully seed the seed of brotherhood and mutual knowledge. May this seed germinate on a human field with no spiritual borders ...” (Petre, 1922, no. 1, p. 2). There was much talk on *Aurora* at the time. It was a significant event on the cultural life of Transylvania (CTC, 1922, no. 15, p. 239).

The magazine published interviews with Hungarian cultural and political leaders in Transylvania. The poet George A. Petre and Alexandru Olteanu were actively involved in achieving an intense cultural exchange between the two peoples. The endeavours had the role of tightening the collaboration between the Romanian and Hungarian intellectuals on the cultural scene of the interwar Bihor (CTC, 1939, no. 9-10, p. 184).

The result of this understanding and collaboration was an anthology of Romanian modern poets with lines translated into Hungarian by Keresztury Sándor. As a reply, a Hungarian writer from Oradea prepared a collection of novellas written by the most representative Romanian writers in 1922 (CTC, 1922, no. 12, p. 1). The cultural collaboration had new significant moments in late June 1923, when an anthology of the modern Hungarian poets was published in Oradea and was translated into Romanian by Justin Ilieşiu. He translated poems written by over twenty-five Hungarian poets. Some of the most important were written by Ady Endre (18 poems in the Romanian version) and Babits Mihály. The volume was entitled *Laura* and was printed in covers artistically worked by painter Ghiția. Due to the endeavours of George A. Petre, the first independent poetry volume by Ady Endre entitled *Blood and Gold* was published in 1930 (CTC, 1923, no. 6, p. 100). In February 1926, the *Cele Trei Crişuri* magazine pursued the action by editing a volume of poetry and novellas from the Romanian literature translated into Hungarian (CTC, 1925, no. 12, p. 193; Kohn, 1980, p. 146-147). Some of the Romanian writers translated into Hungarian were the following: Eminescu, Coşbuc, Vlahuță, Sadoveanu, Rebreanu, Blaga, etc.

Unfortunately, there was a series of obstacles against this cultural collaboration. The first came from the officials, who did not agree to the idea, considering it came too early, at a stage when society did not yet have the concrete conditions for a Romanian – Hungarian approach. On the other hand, there was a certain lack of mutual confidence generated by the artistic and ideological differences between the Hungarian and Romanian writers. Thus, Ligeti Ernő, a former editor at *Napkelet*, inventoried the difficulties and suggested to edit a Romanian magazine exclusively concerned with the Hungarian culture. Another representative of the Hungarian side, Daday Loránt, expressed his lack of belief in the Romanian – Hungarian approach, considering that the results were not very good. Financial difficulties could be added, so that the magazine ceased to be published in June

1923. It appeared again the following year, but it was entirely edited in Hungarian (Antonescu, 2000, p. 291-292). The life of *Aurora* was not long (less than one year), yet it tried to reach all cultural levels. In fact, the whole Romanian press appreciated the appearance of the magazine at a time when dialogue was considered the most appropriate to find a solution to all problems. A new mentality was outlined around *Aurora*, a mentality embracing the phenomenon of living together and leaving aside xenophobic confrontation (Vasilescu, 1993, no. 1, p. 20; Antonescu, 1997, no. 8, p. 89). Undoubtedly, the experience of the magazine was not isolated. There were other bilingual publications, such as *Culisele* (Cluj), *Cimbora* (Satu Mare), but it seems that *Aurora* stood out, due to the programme it steadfastly applied. If it did not succeed to the full, it was not the editors' fault, but of the circumstances (Antonescu, 2000, p. 292).

After this brief introduction to the editorial activity of the Reunion, we need to express some opinions regarding the role of the *Cele Trei Crișuri* magazine in the interwar cultural environment as a genuine means to educate.

At a different moment and from a different point of view considering Romania, the *Cele Trei Crișuri* magazine became what used to be the Romanian modern society magazine *Familia* edited by Iosif Vulcan, a source strengthening national awareness.

When pointless political unrest drew the attention of the public eager for the sensational, the magazine knew how to open its columns to the numerous problems in the western area showing with data and figures that, beyond passenger political interests, there were core issues to be solved (CTC, 1939, no. 9-10, p. 183).

The reviews of the magazine supported the cultural movement on the western border, where the "fight was fiercer between what used to be and what was supposed to be". These were newsletters trying to stimulate the public opinion according to the new requirements of the time (CTC, 1927, no. 5, p. 89).

The publication of the *Cele Trei Crișuri* magazine provided an example showing that a cultural programme could be achieved when deep tenacious conviction pursued a noble ideal (CTC, 1927, no. 5, p. 182). The magazine was not only a tribune in the western part of the country, but even a book with good guidelines.

To be more convincing, the magazine started a series of issues on one matter, thus providing the reader with the opportunity to perceive the depth of the Romanian spirituality expressed in art, literature, politics, economy, etc. (CTC, 1938, no. 1-2, p. 3).

Although the tragic events occurring in 1940 brought about a diminishing activity of the editorial office, the magazine was still published, yet irregularly.

Considering the new political background, the columns of the magazine presented the most varied foreign regions. It was a tactic applied by the *Cele Trei Crișuri* magazine to prevent political power adversity that was hostile to the Romanian interests.

The intellectuals and peasants found in the magazine moral guidelines and a strong means to promote culture at the western border of the Romanian territory (CTC, 1940, no. 1-2, p. 3).

Set up at the end of the year 1919, the Cultural Reunion “Cele Trei Crișuri” settled right from the beginning the aim to educate the regions at the western border of the country.

The media of the time and the local intellectual elite were very enthusiastic and full of hope about the appearance of a new cultural society that, together with the old cultural associations in Bihor, pleaded to spread the Romanian spiritual values in the region of Crișana.

Naturally, a collaboration began between these cultural bodies to pursue the main aim of general progress.

This common means of expression in the Romanian cultural area represented a matter to which committed particularly the “Cele Trei Crișuri” Reunion, an association aware of the need for cultural cooperation to draw systematic plans to reach actual results.

Thus, on the 12th of August 1925, George Bacaloglu turned to the administration of the city “to create a casino of the intellectuals... a friendly, serene and neutral meeting place free from all problems of the day, a shelter devoid of any concern, of personal interests... to complete through its structure and programme against a cultural [...] background of artistic and social pleasure. Through manifestations, soirees, exhibitions, etc., [...] families in our city and county will have an admirable meeting place. It is high time to break from the indifference in which we live over the border and achieve this great brotherhood work” (NA-BCO Reuniunea, dos. 1, f. 24).

The 1925 report of the Reunion showed that “throughout its existence, it always understood... to support or collaborate with any organisation in the cultural field in the city” (NA-BCO Reuniunea, dos. 7, f. 6).

In order to do that, as of 1921, the Reunion started to efficiently collaborate with the following cultural societies: *Asociația Profesorilor Secundari* (*The Association of Secondary Teachers*), Societatea “Crucea Roșie” (The Red Cross), Societatea corală “Hilaria” (“Hilaria” Coral Society), Societatea maghiară *Rigler József Ede* (*Rigler Jozsef Ede Hungarian Society*), *Reuniunea Femeilor române* (*Romanian Women Reunion*), *Societatea scriitorilor, ziariștilor și artiștilor profesioniști de toate naționalitățile* (*All Nations Writers, Journalists and Professional Artists Society*) – all cultural organisations in Oradea, and Societatea Academică “România Jună” din Viena” (“Young Romania” Academic Society in Vienna) (CTC, 1925, no. 10, p. 126).

The Reunion collaborated with the first of the abovementioned societies to support the adult school programme.

The Red Cross contributed particularly during the soirees organised in the countryside, where they gave useful advice to prevent diseases and to preserve the hygiene in peasant households. Following a tight collaboration, the medical advice was edited by the *Cele Trei Crișuri pentru popor* magazine.

During many artistic-literary soirees, the music was provided by the representatives of the “Hilaria” Coral Reunion that knew how to associate general endeavours to promote the national and artistic spirit amongst the public in Oradea.

The *Oradea Women’s Reunion* led by Veturia Candrea committed to a tight collaboration with the “Cele Trei Crișuri” particularly to organise ethnographic exhibitions and several meetings and conferences debating on different problems relating to the realities of the Romanian village in Bihor.

In order to bring the Romanian and Hungarian cultures together, the Reunion conceived a collaboration action with the *All Nations Writers, Journalists and Professional Artists Society* ending up with the publication of the bilingual magazine *Aurora*.

The Reunion did not forget the cultural-national activity developed by the “Young Romania” Academic Society in Vienna. Thus, on the 50th celebration of the Society in 1923, the Reunion organised a series of events in Oradea. Numerous cultural programmes developed on the occasion showed the role and place of this cultural society in the national and European intellectual environment since the end of the 19th century and the beginning of the following century.

The minutes drafted in 1924 during a meeting of the Reunion committee pointed out that in November of that year two cultural soirees were organised in collaboration with the other cultural societies in the city during which professors Bogdan Ionescu and Eugen Sperantia delivered conferences (NA-BCO Reuniunea, dos. 1, f. 10; Ședința, CTC, 1924, nr. 187, p. 2).

In order to develop the collaboration with all cultural societies in Oradea, the representatives of the Central Committee of the Reunion participated to the meeting with the leaders of the central Bihor branch of *Astra* at the Prefecture, where they drafted the programme of the cultural activity for the whole county based on a principle of direct cooperation (NA-BCO Reuniunea, dos. 1, f. 10-11).

Envisaging the same collaboration, this time with cultural organisations outside the Bihor County, there was an action held in Cluj as two meetings (on the 21st of February and on the 18th of March 1920) where they raised the issue of a merger between the Cluj branch of the “Cele Trei Crișuri” Reunion with the local branch of *Astra*. The director, Archpriest Elie Dăianu, presented the common points of the cultural programmes promoted by both institutions and suggested to merge the two. After the debates engaged by some participants, they voted for the merger. They also reached the conclusion that they needed to start an intense cultural action in Bihor, Sătmar, Maramureș, Cenad and Torontal (CTC, 1920, no. 9, p. 32; NA-SCO *Astra*, dos. 42/1920, f. 41, 51).

Following the fruitful collaboration with the cultural organisation from Oradea, the same *Asociațiune pentru literatura română și cultura poporului roman* (*Association for the Romanian Literature and the Culture of the Romanian People*) sent to the editorial committee of the *Cele Trei Crișuri* magazine a press release to be published on the 6th of

September 1927. The release presented the latest books acquired available at the association library (NA-BCO Reuniunea, dos. 1, f. 35).

They also envisaged a connection between the Great Reunion and the Fundația Culturală “Principele Carol” (“Prince Charles” Cultural Foundation) in Bucharest. The collaboration was outlined after a visit of Prince Charles to Oradea. The Prince invited Colonel Bacaloglu in the capital to identify the most efficient way of association. After the discussions, the Reunion was informed that “they could collaborate under the auspices of the Foundation” (NA-BCO Reuniunea, dos. 7, f. 10; Sentinela, 1924, no. 187, p. 2).

Another cultural society having tight relations of collaboration was the “Societatea muzicală George Enescu” (Musical Society George Enescu) from Iași. The Society sent the Reunion a report on its activity covering the period 1921-1922 (NA-BCO Reuniunea, dos. 1, f. 76).

In a letter sent to the leader of the Reunion in 1927, the director of the Conservatory in Târgu Mureș requested the “yearbooks published since the Romanian occupation to present day. In case of absence, a statistics referring to the school situation from the past three years” as he had been appointed by the Minister of Arts and Cults to draft a memoir “on the current organisation of commune conservatories in Ardeal” as a “basis for the new law for this type of schools”. At the end, George Bacaloglu was impelled to draft a “report on the shortage... in organising the school” (NA-BCO Reuniunea, dos. 1, f. 37).

Another expression of the unitary spirit between the different Romanian cultural societies including the ones belonging to minorities was the election of people belonging to other cultural associations in the leading committees. For instance, George Bacaloglu was elected as a member in the board of the *Societatea Filarmonică din Oradea* (Philharmonic Society of Oradea). Following his support, they thanked him by further requesting his “heartly support” (NA-BCO Reuniunea, dos. 1, f. 82). The Hungarian society *Rigler József Ede* acted similarly. They informed the leader of the Reunion that he was elected as a member in the leadership of the society during the general constituting assembly (NA-BCO Reuniunea, dos. 1, f. 80). This is how all cultural energies worked together to reach clearly established aims.

The Reunion was aware of the importance of the cultural collaboration with other similar societies. Only under these circumstances could they seize the local spiritual attributes guaranteeing the success of the actions initiated for education.

Throughout the interwar period, the association from Oradea managed to develop numerous cultural events stipulated in the statutes project. They enjoyed the perception and appreciation of the Romanian society at a time of exploration and reorientation on the social and cultural levels. Through them, Romania was involved in the action of spreading the educational process at the western border of the country, an initiative taking a clear place in the broad cultural programme envisaged by the Romanian unitary national state.

Considering the material difficulties, the dissensions existing between some intellectuals and other matters relating to political and confessional disputes, besides the weak financial support of the state, a series of projects envisaged by the Reunion could not develop in the society in Bihor, a society in need for culture first of all.

Yet the wide range of cultural means (artistic-cultural soirees, lectures, conferences, exhibitions, musical shows, libraries, etc.) succeeded in penetrating the ever wider social classes, both urban and rural. In both cases, notable results could be seen from the point of view of education that strengthened the contact between the two living environments.

All activities shown above were united as they attempted to spread culture amongst all social classes of the population. From this perspective, most members and collaborators of the Reunion built their destiny on good deed leading to viable solutions.

For the development of these broad educating actions, all personalities of the time irrespective of their nationalities were called. Exclusivism, provincialism and xenophobia were pointless in cultural associations wishing to put together all energies to create culture as one force.

The important results obtained by the Reunion were left to younger generations that, in the conception of the cultural society from Oradea, had “to take further a fight proving to be so useful for the welfare of the nation. As it is not enough to enjoy what has been given to you... Strength is the diligence of knowing how to preserve and by preserving to make right on the path of perfection everything tightly relating to culture” (CTC, 1935, no. 1-2, p. 46).

Due to its activity, the “Cele Trei Crișuri” Reunion succeeded “to remain a vivid testimonial deeply talking to the generations to come” (CTC, 1935, no. 1-2, p. 40).

In the activity report for the year 1925, the Reunion best expressed its programmatic intentions: “Our mission is delicate yet resolute. We work for the affirmation of national and cultural unity. We hope we can raise the nation to an as high level as possible through our undoubted values... We work for the achievement of social harmony amongst all sons of the country irrespective of their nationality and confession to make this spiritual bond lead to mutual respect and peace in our beautiful yet troubled country. We work for the affirmation of the Romanian life and we remain a cultural-national guard at the western gate of the country. To do that, we need something: solidarity on the neutral land where we work. We are also convinced that nothing can be achieved unless there is sincerity and enthusiasm at the basis of each common action, but also perseverance to achieve the progress we aim at...” (NA-BCO Reuniunea, dos. 7, f. 1).

The promotion of a genuine artistic life as a good interethnic collaboration (the Romanian-Hungarian cultural approach was particularly envisaged) that efficiently framed aesthetic ideas was a steady concern of the society in Bihor. Unfortunately, in general lines, the society had no clear-cut taste for genuine art as they were devoid of artistic

education and instruction. The state authorities had the duty to educate the public, so that the artist could take a significant place in the Romanian interwar social life. The situation increased also because of the mentality indebted to the past, the material cause and, last but not least, the lack of civic education in the sense of valuing art and the beauty as aesthetic value were serious obstacles.

Nevertheless, exhibitions organised particularly in Oradea, which was by far the most important artistic centre in Crişana, were attended by a numerous public. Cultural newspapers and magazines of the time tried to raise the sensitivity of public opinion towards these artistic events by publishing numerous memos and items of information on exhibitions organised in the county, to inform on the main movements and modern painting schools in the country and abroad by showing their significance in the cultural area of the time (Roşu, 1982, p. 329; Petrescu, 1928, no. 10, p. 593-595).

The framework needed for a modern development of plastic arts in Oradea was outlined as of 1919, when a series of actions meant to implement a genuine cultural-artistic life were organized. Against this background, they pleaded for the establishment of a superior school of arts in Cluj, when painters Ion Buşîia from Beiuş and Flaviu Domşa from Blaj drafted a project right after the war. The initiative was supported by the “Cele Trei Crişuri” Cultural Reunion. They pleaded for the establishment of a Transylvanian art exhibition organised according to humanistic and democratic principles. The echo of the initiative was stressed by Emil Isac, a well-known animator of the Romanian interwar cultural life who expressed his hope the aim would be achieved, thus demonstrating that there was no hatred in art and painters in Romania could find a common ground irrespective of their ethnic origin.

The exhibition opened in Cluj in the spring of 1921 under the name *Collegium Artificum Transylvanicorum*. A catalogue was issued in Romanian, Hungarian, and German. Some of the numerous exhibitors were artists from Oradea, such as Alfréd Macalik, Ödon Mikes, Mauriciu Barát and Maria Koszeghy, Hugo Mund, Eugen Poszony, Ernest Tibor etc. Through their works, they succeeded in proving to public opinion that Oradea developed a favourable frame to outline a genuine artistic life. This platform for Romanian-Hungarian artistic collaboration continued in Oradea. On the 11th of December 1932, they organised there a collective exhibition of painting, sculpture and decorative art under the auspices of the *Asociația artelor frumoase (Fine Arts Association)* in Oradea. Two years later, the association brought together the most representative artists from Oradea for an exhibition in the great hall of the Prefecture. Oil and watercolour works, as well as drawings, engravings, sculptures, etc., were exhibited. The varnishing was an expression of complete artistic maturity calling the society in Oradea to a better knowledge of the creative skills of the following talents: Ernő Tibor, Mauritiu Barát, Alfréd Macalik, Roza Molnar, Iosif Biro, Edmund Mikes, Eugen Pozsonyi, Iulia Sziraki, Adalbert Zsigmond, etc.

In 1922, in order to contribute to the mutual knowledge of the two cultures and with the support of George Bacaloglu and with George A. Petre, Sandor Kerestury and Laszlo Salamon as editors, the bilingual (Romanian and Hungarian) *Aurora* magazine was first published. Local plastic artists, as well as other artists such as Aurel Popp and Valer Ferenczy were presented in the pages of the magazine, while one of Ernest Tibor's exhibitions was highly appreciated as an important event of the Romanian – Hungarian cultural and artistic approach. All through the interwar period, the pages of the *Cele Trei Crișuri* magazine promoted the valuable Romanian creation, informed the readers on the main artistic events developing in the country and abroad, all these without ignoring the creations of local artists they commented and analysed in an objective manner (Țoca, 1983, p. 6-7; Lăptoiu, 1999, p.156; *Expoziție colectivă*, 1932, no. 837, p. 3; *Expoziția*, 1932, no. 3, p. 49-50, *Vernisajul expoziției*, 1934, no. 1177, p. 6; *Expoziția Asociației*, no. 1182, p.12).

Considering the context favourable to artistic life, the art in Oradea knew a development worth mentioning that was proved by the existence of a painting school, by the organisation of several individual and collective exhibitions, as well as by the involvement of the creators from Oradea in organising a professional association of plastic artists. During the congress organised in Baia Mare on the 14th and 15th of January 1936, Aurel Popp had the initiative to debate on the opportunity to set up a “Union of Fine Arts in Transylvania and Banat”. Amongst the sixty-eight participants, there were Roman Mottl, Coriolan Munteanu, and Maria Zaharia (Țoca, 1983, p. 7-8) from Oradea.

In 1938, the “Plastic Art Society” was established in Oradea. It was a significant moment in the evolution of the interwar artistic life of Bihor. Unfortunately, the artistic endeavours that began to outline were suddenly stopped by World War II (Pavel, 1996, p. 55).

The recovery of the artistic life in Bihor during the interwar period can start with the presentation of the creative activity of the painter Alfréd Macalik, the oldest painter from Oradea whose activity covered over six decades. He was born in Vienna on the 10th of September 1888 as the son of a military orchestra conductor. The following year, his father transferred to Sibiu, then to Oradea and he moved there with his family. He pursued his studies at schools of fine arts in Krakow (1910-1911) and Budapest (1911-1914). After the dramatic experience of World War I, when he enlisted in the Habsburg army, he returned to Oradea in 1918. From 1930 to 1937, he led a painting and drawing school thus providing guidance to many artistic talents. He participated with 105 works at an exhibition in 1931. There, some of his students stood out (Teodor Țoldan, Iuti Leichner and Ludovic Körösy), as they showed their evolving personalities through their artistic work. Although he had a call to music, he focused his energy on drawing and painting by forming his own style highly appreciated by critics. The experience of the war had an imprint on his artistic creations, as they communicated a perpetual sadness, a fact obvious

in his numberless self-portraits. Yet he was still confident in the fate of art and love for his fellows.

He had a successful debut at a collective exhibition opened in Oradea in the year 1919. He then became known to the public together with Alex Ziffer, Andrei Micola, Aurel Popp, and Ernest Tibor at the great Transylvanian art exhibition organized in Cluj in 1921. He was also present together with other well-known artists of the time at the exhibition of artists from Ardeal in 1930, as well as at all regional shows organised in Oradea. His prolific artistic work is confirmed by his 22 exhibitions organised in Oradea from 1919 to 1939, to which other personal shows opened in Marghita (July 1921), Săcuieni (June 1922), Valea lui Mihai (August 1922 and September 1933), Salonta (April 1923) and Beiuș (April 1934) can be added.

As of 1924, his exhibitions were present in other Transylvanian cities, such as Sibiu, Turda, Arad, Alba-Iulia, Târgu-Mureș, Sighet, etc. His valuable works praised by critics crossed the border of the country when participating to the collective exhibition in Budapest (1924) and to the personal one in Krakow (1926).

Until his death on the 19th of September 1979, he opened over seventy personal exhibitions in the country and abroad. He signed almost 2,000 paintings and hundreds of drawings and studies. These artistic creations were largely commented in the press of the time. At the exhibition organised at the Journalists Circle of Oradea in 1937, Alfréd Macalik was characterised as a good painter valuing the line and the detail. His paintings were considered by critics as fine works exploring inner life being close to Tonitza's style.

In most of his creations, the form enters the space coherently, according to the classic geometrical perspective. He elaborated compositions relating to the city on the Crișul Repede River, the picturesque regions in Bihor, the landscape having the most important role in his artistic work. Here, nature is harmoniously organized and submitted to the feelings of the artist. The waterscapes are artistically rendered in different solar moments (sunrise, zenith, sunset) and the succession of seasons depicted succeeds in stating the simple attitude of Macalik regarding the world. Interiorised landscapes rendering vivid the image and the atmosphere of the city and of the surroundings are significant in works such as *Iarna pe Criș (Winter on the Criș)*, *Valea Iadului (The Hell Valley)*, *Peisaj de iarnă (Winterscape)*, *Chei orădean (Pier in Oradea)*, *Peisaj rural (Rural Landscape)*, *Barcă albă pe Criș (White Boat on the Criș)*, *Două căpițe de fân (Two Haystacks)*, etc. He has a precise and rigorous painting exhaling sensitivity. From this perspective, the artist showed he was a connoisseur of the human character. We will remind his most expressive paintings, as follows: *Peisaj din Remeți (Landscape in Remeți)*, *Peisaj din Baia Mare (Landscape in Baia mare)*, *Apus de soare (Sunset)*, *Toamnă (Autumn)*, *Peisaj de munte cu nori (Cloudy Mountainscape)*, *Drum înzăpezit (Snowy Road)*, *Apă liniștită (Still Water)*, *Pomi pe malul Crișului (Trees on the Criș Bank)*, *Bărci (Boats)*, *Natură statică (Static Nature)*, *Nuduri în baie (Nudes in the Bathroom)*, *Autoportret (Self-Portrait)*, *Interior din salonul roșu (Interior in the Red*

Hall), etc. (Țoca, 1983, p. 8-9; Expoziția, Maczalik, 1931, no. 699, p. 2; Mózes, 1966, p. 2-4, 8-10, 12-18; *Două expoziții*, 1937, no. 428, p. 5; O viață, 1976, no. 123, p. 2).

His artistic work contributed to a great extent to enriching the local painting patrimony, as it shows a mature artist mastering his means of artistic expression (Mózes, 1966, p. 2-4; Crișan, 1978, p. 3-4).

Another representative of local painting was artist Tibor Ernő. He was born in Oradea on the 28th of February 1885. Together with Alfréd Macalik, Balogh Istvan, Leon Alex and Nicolae Irimie, he represented the interwar plastic art in Oradea.

He graduated from secondary school at the literary association *Holnap* led by the poet Ady Endre. In 1904, he was granted a scholarship by the leaders of the city of Oradea to the Arts Academy in Budapest, where he studied painting with Tivadar Zemlenyi. There, he copied the works of great artists, made drawing and colour studies, working particularly according to the model offered by his Hungarian professor. Three years later, he left for Paris, where he studied at the Julian Academy for two years. As a token of appreciation, the Academy granted him the second prize on an exhibition of works belonging to the graduates.

The painting colony in Baia Mare established at the end of the 19th century encouraged the aesthetic bonds with the new European modernity and influenced the young man's artistic work. His first personal exhibition was organised in Oradea in 1907 and comprised mostly portraits and landscapes. They were a proof of the influence of the artistic trends developed at Baia Mare. After World War I, he organised exhibitions in important centres, such as Oradea, Arad, Timișoara, and Cluj.

In the spring of 1922, the *Aurora* magazine informed its readers that the painter would organise a painting exhibition in the capital of the country. The works to be exhibited were new creations, such as: *Piața noastră (Our Market)*, *Țăranca română dansând (Romanian Peasant Dancing)*, *Țigăncile (The Gipsies)*, *Podul de la Băișoara (The Bridge at Băișoara)*, *Colț de laborator (Lab Corner)*, *Piața (The Market)* and *Spre casă (On the Way Home)*. The success of the exhibition visited by a great number of people determined him to ceaselessly improve his style. To do that, he went on several study trips in France and Italy, where he exhibited works of great artistic refinement. Returning to Romania, the artist participated to a collective exhibition of the painters from Oradea opened in Oradea in December 1926. On the opening night, the Mayor Gheorghe Tulbure delivered a speech. Besides them Tibor Ernő, Baráth Móritz, Alfréd Macalik, Mikes Ödön, sculptor M. Kara, etc. participated. A new personal exhibition of the painter was opened in Oradea in 1928. It comprised works inspired by Italy. In an article published in *Familia*, Tabery Geza appreciated the artist's talent shown particularly by the taints of colour, light and movement.

One year later, the painter was in Bucharest, where he exhibited in "Mozart" Hall. He was appreciated by the critics of the time due to his easiness in setting the colours directly on the canvas. Tibor Ernő participated to all annual official salons in Bucharest. In

1930, he exhibited fifteen works on diverse topics at the exhibition of the plastic artists of Ardeal in Cluj. In 1933 and 1934, he exhibited in the same hall of Bucharest. The state bought one of his paintings on a topic dating back to the Breton time, while the press was praising his works. Over 150 paintings on urban landscapes, nudes and still nature were displayed in Oradea, his works promoting quality art in the Bihor society.

Aware of the artistic value of his works (as they were a subject for several articles in the field published in magazines such as *Familia*, *Cele Trei Crișuri*, *Vasárnap Uisaj* from Cluj, or *Erdelyi Elet* from Arad), the administration of the city of Oradea granted him a new scholarship, this time in Dobrogea. The scapes in Dobrogea were a new visual and painting experience for the artist. He painted realities from Constanța, Balçic and other areas along the Black Sea coast.

His artistic fame considerably grew in 1937-1938, when, after a new show hosted in Oradea, he succeeded in exhibiting together with great names of the Romanian painting of all times: Gheorghe Petrașcu, Theodor Pallady, I. Teodorescu-Sion, etc. The same year, he was elected Vice-President of the Society of Plastic Arts in Oradea.

The war influenced his fate. On the 3rd of May 1943, he was deported to Auschwitz, where he caught typhoid fever and died twelve days before the liberation.

His artistic universe brought to the foreground the urban space, the agitation of the markets, the circus, and the landscapes of Normandy and Bretagne. The painter used a range of colours well adapted to the motive without neglecting the detail. A specific element of his work is the image of the markets in paintings, such as *Piață (Market)*, *Târg de oale (Pottery Fair)*, *Precupețe (Petty Traders)*, *La talcioc (At the Barter)*. The cityscape shows the old tramways and cars in movement with people in a hurry, wishing to get to their destination as soon as possible. Other paintings, such as *Țărani prășind (Peasants Weeding)*, *Strânsul fânului (Collecting the Hay)*, *Casă țărănească (Peasant House)*, *Bucătărie țărănească (Peasant Kitchen)*, *Culesul porumbului (Maize Cropping)* show aspects inspired by the Transylvanian village life explored by the artist with sensitivity and passion. Other works focus on everyday life and simple people.

His scapes, such as *Pe malul mării (At the Seaside)*, *Peisaj orădean (Oradea Landscape)*, *Malul Crișului (The Criș Bank)*, *Podul Rialto (The Rialto Bridge)*, *Peisaj din Bretania (Landscape from Bretagne)* are seized at different times of the day, suggested by colour changes on the surface of the canvas. All these sources of inspiration were a never-ending fountainhead for the painter. Just like other representatives of the painting in Oradea (Macalik, Balogh Istvan, Leon Alex, Nicolae Irimie), he created invaluable works imposing him as a genuine artist with an unmistakable originality (Roșu, 1977, p. 247-257; Zintz, 1984, p. 497-499, 501, 504, 505, 515, 517; Tibor Ernő la București, 1922, no. 12, p. 14; Expoziția Tibor Ernő, 1934, no. 1320, p. 2; *Expoziția, Tibor*, no. 227, p. 7; CTC, 1927, no. 2, p. 34; Tabery, 1928, no. 7-8, p. 6; Martin, 1978, p. 9).

Balogh Istvan (1890-1956) was a particular personality of the Romanian local art perfectly fitting into the artistic life of the interwar period. The artist was born in Oradea

on the 10th of July. After a while, his family settled in Cluj. There, the future artist started to attend the elementary school. In 1909, he returned to Oradea and studied at the Academy of Law for a short while. He then turned to painting exclusively. He had the first artistic results when he participated to a series of exhibitions from 1910 to 1913. During the war, he was stationed and fought in Beograd. At the end of the war, he participated to the Exhibition of the Painters from Oradea that was held in Timișoara in 1922. As of 1925, he took some trips to Vienna, Nuremberg and Tirol. Before World War I, he got in contact with the western artistic life due to a scholarship in Munich, where he attended the Academy of Fine Arts. That period was a decisive influence particularly in point of artistic structure.

His works were soon known after his participation to the exhibitions organised in Bekescsaba (1925) and Budapest (1927). In 1940, he returned to Oradea, where he had a life of deprivation owed both to the uncertain situation caused by World War II and to his disease (phtisis, a disease he caught during World War I).

Painter Balogh István stood out due to his personal style in watercolour with shapes outlined in definite lines. The topics are restrained to landscapes, portraits, and self-portraits. The leitmotiv of his work was that of the lonely hiker, the wanderer, standing out for his own travels. The topic close to the author's state of mind was taken in several versions, representing the dark image of the lonely traveller in a bleak background. One of the most suggestive paintings is entitled *Dorul (The Longing)* and represents the bust of a female nude suggesting a poetic state of meditation. His other works, such as *Umbra (The Shadow)*, *Suferință (The Suffering)*, *Singurătate (Loneliness)*, *Pribeagul (The Wanderer)*, *Capul lui Ioan Botezătorul (The Head of John the Baptist)*, *Pescarul (The Fisherman)*, *Ofranda (The Offering)*, *Amurg (Dusk)*, *Lună (Moon)* express the same obsessive states of estrangement. The steady development of his creation throughout the years and the definite value of his works placed Balogh Istvan amongst the important artists of Oradea (Crișan, 1973, p. 5-9, 11-27; Martin, 1978, p. 9).

Leon Alex (1907-1944) stood out in the artistic life in Oradea as well. He was a sketcher and painter. His creation was a model of elevated pleading art. Born in Petroșani, he moved to Oradea in 1916, where he committed to painting and graphics particularly as of 1930. His first exhibition was held at the Journalists Circle of Oradea in 1932. The following years, the artist managed to publish two lithography folders. The following exhibitions (in Oradea, Timisoara, Sighet, Arad and Brasov) enjoyed a great success commented by the press of the time. In this way, the artist was noticed by the progressist personalities of the interwar culture. Thus, he went to Paris, where he studied at the Ranson Academy and had the chance of becoming the assistant of Master Aristide Maillol.

His art displayed an expressionism with social-proletarian trends also because he was an artist-citizen connected to the realities of the time. His drawing was simple, rigorous and aesthetic. His paintings showed everyday life, the misery, the war, the

unemployment, the prostitution, the famine, the precarious place of the artist in society. Titles such as *Strigățul (The Scream)*, *În delir (Deliriously)*, *Coșmarul (The Nightmare)*, *Văduva (The Widow)*, *Flămânda (The Starving)*, *Dansatoarea (The Dancer)*, *Pictorul (The Painter)*, *Capitalistul (The Capitalist)*, *Bătrânii (The Elderly)*, *Studentii (The Students)*, *Celibatarul (The Bachelor)*, *Familia îndurerată (Grieving Family)*, *Măcelarul (The Butcher)* show the disarming honesty of the painter towards the cosmopolite corrupt society (Deac, 1996, p. 90; Crișan, 1974, p. 5-7, 9-22; Zintz, 1992, p. 29).

Another artist standing out in the interwar Oradea was the landscapes painter Nicolae Irimie. Born in Deva, he attended the courses of the Academy of Fine Arts in Budapest. After graduation, he made for Vienna, Dresden and Munich, where he studied painting and graphics. After 1920, he went to Oradea and was appointed a drawing teacher at the Emanuil Gojdu Secondary-School. There, he worked ceaselessly and succeeded in organising a personal exhibition every year from 1923 to 1925. His works rendered landscapes surrounding Oradea and the banks of the Crisul Repede. They were highly appreciated by the public in Oradea that was beginning to get a taste of this type of cultural-artistic events. This is shown by the great number of paintings sold during the exhibitions opened in the city.

Nicolae Irimie was committed to the cultural environment provided by the interwar society in Bihor and competed with local artists without complexes or reserves.

The following years, he worked for social orders and painted images depicting Biblical topics. He organised his last exhibition in the Festive Hall of the City Hall of Oradea in 1932 and enjoyed a great success. On the occasion, the art loving public bought thirty paintings, thus proving the artwork of the painter. The *Cele Trei Crișuri* magazine characterised him as a sensitive landscape painter and a painter of static nature. Works such as *Peisaj din Oradea (Landscape in Oradea)*, *Pod peste Criș (Bridge over the Cris)*, *Malurile Crișului (The Banks of the Cris)*, *Crișul la marginea orașului (The Cris at the City Outskirts)* recommend him as a fine landscape painter who knew how to give its canvas a subtle solar colour in a well-articulated detail. The artist left Oradea for good in December 1940, when he moved to his native city, Deva (Țoca, 1977, p. 5; Asan, 1924, no. 14, p. 3; Expoziția, Irimia, 1924, no. 173, p. 1; Marele succes, 1932, no. 803, p. 2; Tribuna, 1922, p. 5; *Un pictor: N. Irimie*, 1923, no. 11-12, p. 189; Zintz, 1985, p. 438).

Ruzickay György was another interwar artist connected to the cultural area of Crisana. He studied at the free painting school established by Barát Móritz in Oradea from 1917 to 1921. The public had the opportunity to know the painter's artistic universe as of 1924, when he opened several exhibitions in Oradea belonging to the series *Omul și mașina (The Man and the Machine)* and *În căutarea dragostei (Looking for Love)*. His works, such as *Concurs de motociclete (Motorcycle Contest)*, *Forța electrică (Electric Power)*, *Stradă la țară (Street in the Countryside)* start from the neo-Impressionist approach from which he would preserve the rhythm and the play of light and shadow all through his art work. The same topic of the contemporary mechanised life was also

approached in *Ridicătorii de catarg (Mast Raisers)*, *Mașina se pune în mișcare (The Machine Starts to Move)*, *Maternitatea (Maternity)*, *O nenorocire (A Disaster)* that he exhibited at the Oradea Journalists Club in June 1933 (Martin, 1978, p. 9, 34; Expoziția, Ruzicskay, 1933, no. 981, p. 2).

The artistic atmosphere in Bihor was completed by other names of local or national art presenting their work at exhibitions open in Oradea, Beiuș, Salonta and Marghita. All through the development of the cultural-artistic events, the visiting public and the society in Bihor in general dispelled the doubt regarding such initiatives that were initially considered as mere sources of money for the exhibitors, while their educating role was minimised.

Gradually, the organising means improved, so that the artists had the opportunity to exhibit in conditions favouring a genuine cultural life.

In the summer of 1922, an exhibition of the portrait painter Szenes opened in the Hall of the Prefecture in Oradea. The value of his works was also acknowledged in other countries, such as Hungary, France, or the United States of America. The artist managed to set on canvas the faces of many personalities living in interwar Oradea (Roman Ciorogariu, Constanța Zamfir, Vasile Popovici, Colonel Negulescu, Rita Mărcuș, Lucia Zigre, and General Moșoiu). His portraits were characterised as being “vivid fragments of life seizing the troubles, the suffering and the inner unrest imprinted in gestures and attitude”. Together with them, the public could also admire a collection of pastel and still nature paintings (Cronica artistică, 1922, no. 8-9, p. 136-137; Roșu, 1982, p. 331).

The same year, the public could visit the exhibition organised by the painter Jenő Pozsonyi. Most of them were landscapes, the most beautiful being *Plugărit de primăvară (Spring Ploughing)*, *Topire de zăpadă (Melting Snow)*, *Strada Kapucinus (Kapucinus Street)* (Expoziția, in Aurora, 1922, p. 15).

For two days in November 1922, the local public in Beiuș could visit a painting exhibition set in the hall of the Central Hotel. Many artists exhibited their works, such as Rottmann, Mozart Csok Ștefan, Katona Nándor, Kezdi Kovács, Edvi Illés Aladár, Pentelei Molnar, Beli Vörös, Iranyi Grimwald, Pallik Bela, etc. (Beiușul, 1922, no. 46, p. 5).

A great success had the Hungarian artist from Oradea Enrik Major due to his caricature works exhibited in the Netherlands and England. The public was informed by the *Cele Trei Crișuri* magazine how the artist was celebrated by the cultural circles in London. *The Daily Graphic* even proposed a labour contract as main illustrator and mentioned his talent in the field of caricature in several articles. The London newspaper compared the artist from Romania with the great master of the British caricature Phil May. He was also employed by the illustrated magazines *Bystander* and *Graphic*, where he posted his most striking caricature published in London, that of Lloyd George (Succesul unui artist, 1922, p. 140).

In September 1923, the young painter from Banat Geza Zsigmond opened his personal show in Oradea. The fifty paintings he exhibited were considered as a success,

although they showed that the artist was still a beginner. Another interesting exhibition was arranged by the painter Imre Földes, who showed the art loving public the following paintings: *Sfârșitul (The End)*, *Reîntoarcerea turmei (Return of the Herd)*, *După masă (After Lunch)*, *După bal (After the Ball)* (Roșu, 1982, p. 331; Expoziția Földes, 1923, no. 12, p. 14).

One year later, the inhabitants of Beiuș were invited to an exhibition opened by the artist Bella Zsigmond. The newspaper *Beiușul* accounted in a column dedicated to artistic events the fact that “the public has started to appreciate these cultural-artistic events”, a proof of their sensitivity being the purchase of paintings “achieved with a special artistic sense” (Beiușul, 1924, no. 42, p. 4). The same year, the “Kornweiss” shop in Oradea located on the Ferdinand Boulevard hosted the painting exhibition arranged by Adalbert Zsigmond. The public could admire portraits of Romanian peasants and a series of landscapes from Bistrița și Sălaj (Expoziția Zsigmond, no. 128, p. 2).

Towards the end of the year 1925, Oradea hosted three exhibitions drawing the attention of the critics and of the public. The exhibitions comprised the works by artists Eugenia Filotti-Atanasiu, Maria Ciurdea-Steiner and Gobian, to which were added the creations of painters Ioan Isac and Bela Zsigmond. The works focused on landscapes from Bihor, such as *Moara pe râu (The Watermill)*, *În amurg (At Dusk)*, *Turnul bisericii în furtună (The Church Tower in the Storm)*, etc., as well as studies, nudes, and the works *Țigănci vrăjitoare (Witch Gypsies)* and *Cap de țigancă (Gipsy-woman Head)*. The same year, the exhibition of Letiția Al. Stamadiad was hosted in the Great Hall of the local Prefecture. The paintings depicted winter landscapes and still nature. For the beginning of the following year, the local Romanian press mentioned the exhibition of painter Minișan to be hosted in the same Hall. We have to notice the relentless propaganda the press of the time carried out to promote art amongst the Romanian public opinion in Bihor that had to become an efficient means of education at a time of cultural effervescence (Roșu, 1982, p. 332; Expoziția, 1925, no. 68, p. 2; Sentinela, 1925, no., p. 1; Expoziția, Sentinela no. 5, p. 2; Expoziția Zsigmond, no. 163, p. 2; O expoziție de pictură, no. 166, p. 2).

At the end of 1927, the exhibition of painter Magdalena Füzesery was held in the hall of the “Carmen” cinema in Oradea. The works depicted landscapes, such as *Munții Beiuș-Bicaciu (The Beiuș-Bicaciu Mountains)*, *Peisaje din Carei (Landscapes from Carei)*, *La plug (Ploughing)* that could not be considered as belonging to a certain trend in painting. The original style and the vitality of the colour also characterised the exhibitions held at the “Apollo” cinema and at the Journalists Club, as well as other exhibitions organised in Oradea in 1933. Her work entitled *Vederea din Vadul lui Carol (View from Vadul lui Carol)* was highly appreciated particularly for the energetic tone she gave to the canvas (Expoziția, Magdalena, 1928, no. 1, p. 5; Expoziție de pictură, 1933, no. 1136, p. 6).

A special artistic event accounted by the press of the time was when painter Stoenescu exhibited in Oradea in 1928. The artist managed to stand out in the artistic

circles in Paris due to his works. An article in the field presented the causes of such a success gained “through his artistic awareness, through the work and vigour of a talent of a strong and bright originality” (CTC, 1927, no. 2, p. 34).

The hall of the Journalists Circle was open to the public for the exhibition of the works belonging to Anisie Grozda in November 1929, a former student at the school of fine arts in Paris. The event was opened by Bishop Roman Ciorogariu who appreciated the art and talent of the young artist in his speech. The specialists commented on the works and reached the conclusion that the artist was concerned with movement and colour and mastered the art of drawing. At the opening of the exhibition, the numerous public bought nineteen paintings, which was considered by a specialist as a sign that “the art of the works surprised the visiting public”. The most representative paintings were *Bătrânețe* (*Old Age*), *Bine dispus* (*Good Humoured*), *Noapte de vară* (*Summer Night*) and *Fie voia Ta* (*Thy Will Be Done*). As this last painting had a religious theme, the Orthodox Parish Council of Oradea purchased it.

The artist was also appreciated by well-known personalities in Paris. At the official Salon of the French artists, they exhibited a bronze bust sculpted by the artist in the summer of 1930. Her second exhibition in Oradea was organised in November 1934. The critics were impressed by her painting free from conventional patterns. Works such as *Natură din Ardeal* (*Nature in Ardeal*) and *Portret de femeie* (*Portrait of a Woman*) drew the attention of the public in Oradea particularly through the delicacy of the tones (Expoziția, in *Tribuna*, 1929, no. 45, p. 4; NA-BCO Oradea, dos. 8/1925-1950, f. 91; *Gazeta de Vest*, 1929, no. 103, p. 4; no. 108, p. 2; Expoziția Anizie, 1934, no. 1354, p. 2; *Tribuna*, 1930, no. 21, p. 4).

In 1930, a significant collective exhibition of plastic arts was organised by the Oradea affiliate of the Society “Prince Mircea” under the coordination of Valeria Bledea, the president of the charity. The public was interested in the initiative as they also noticed another aspect of this settlement, i.e. the active participation of the society in Bihor to general welfare (*Tribuna*, 1930, no. 21, p. 4). The same year, Master Dănilă Andrițoiu opened a sculpture exhibition in the salons of the *National House*. The representative work, *Cap de copil* (*Child Head*) sculpted in marble, aroused the interest of the public. There were also a series of drawings and painting mainly inspired by the landscape around Vașcău. Due to their beauty, some were purchased by the National House for the collections of the ethnographic museum (*Gazeta de Vest*, 1930, no. 274, p. 2).

Painting and drawing exhibitions continued to be organised in Oradea in the autumn of 1931 due to the care and concern of militants such as Ms. Davidescu, Minișan and T. Ernö. On the 20th of December, a painting exhibition was organised by Bözsi Stern, a local talented artist who showed her mature talent in her works. The main feature of her works is the courage with which she painted the subjects. The exhibition was dominated by portraits. The critics appreciated that “although not entirely a success, they had that

manly vigour of the brush and the expression of a genuine originality”, which was shown by the countryside landscapes.

In the year 1932, painter Földes exhibited in Oradea several canvases on daily activities, portraits, and nudes. The following year, new artistic moments took place in Oradea. Artist Erdős Imre Pal opened the series on the 7th of February, when he exhibited in the hall of the Journalists Circle drawings and paintings on subjects chosen from the psychological range. The most important event happened in October, when they organised a collective show of painting, sculpture and graphics art under the auspices of the young artists from Oradea. Several artists participated to the event, such as Imre Földes, Carol Roman, Imre Vanyai, N. Fleischer, Iosif Szabo, Ernő Grünbaum, etc. Some of the works standing out were those belonging to Vanyai that seized not only physical, but also the inner traits. The works by Carol Roman, who participated to a show in Los Angeles with thirty works made of wood were considered as valuable works by the American jury. There were also canvases by N. Fleischer, such as *Flămânzii (The Starving)*, *Prigonii (The Oppressed)*, *Sat românesc (Romanian Village)*, *Sărbătoare de iarnă (Winter Holiday)*, or the sculptures by Iosif Szabo and Zoltan Sziniselö. A very gifted sculptor exhibiting in Oradea in 1933 was Victor Olteanu whose works were highly praised.

In the spring of 1934, the salons of the “Crisana” House hosted the works signed by the journalist and painter Miti Şeptilici. The public could admire landscapes, portrait studies and works brought together in an exhibition praised by the critics. Another show of the artist was organised in the autumn of the same year, when thirty oil painting, twenty-one pastels and some watercolours and caricatures were exhibited. Visitors unanimously appreciated the artistic evolution of the painter (*Universul*, 1934, no. 85, p. 12; *O pictoriță*, 1931, p. 2; *Expoziția Földes*, 1932, p. 51; *O expoziție*, 1933, p. 2; *Expoziția artiștilor*, no. 1099; *Expoziție de pictură*, 1934, p. 6; *Expoziția Şeptelici*, no. 1339, p. 4; *Flori*, 1933, p. 16). Two other shows were organised by Magda Füzessery and Alexandru Lövinger, in which the artist approached subjects depicted from everyday life and made a good impression on the public (*Două expoziții*, 1934, p. 5). Before the end of the year, the meeting room of the Prefecture hosted a show comprising twenty paintings and twenty watercolours. The show was organized by Elena Popea. They showed the public picturesque regions in Europe and landscapes from Transylvania. Her works were praised particularly due to the ability of insight through colour, as they had a genuine personal value. The artist was a groundbreaker in the award of international prizes granted to women artists, as she won the prize of the “Paillard” contest (*Expoziția Elena Popea*, 1934, p. 2; *Crăciun*, 1997, p. 187). A new show followed. It was organised by the group of artists called *Asociația pictorilor din București (The Bucharest Painters Association)*. Over 140 paintings signed by M. Teişeanu, P. Bulgăraş, P. Ioanid, N. Tempeanu, O. Rațiu, Gh. Rațiu, etc. were exhibited. The shows of painters Ladislau Keleti and Lucian Alba closed the series of art events organised in Oradea in 1934. They both tried to depict the

contemporary world full of social clashes and dramatic inner unrest. The public seized these aspects due to a special subtlety of the colour (Cronica plastică, 1934, p. 8).

The following year, interesting shows were organised in Oradea. They proved to be an efficient means to promote the Romanian culture at the western border of the country. A first exhibition was organised by Rozalia Molnar at the Journalists Circle, where the public could see an art of a high artistic and spiritual value. The landscapes from France and the still nature were the hit of the show. In February, an exhibition by the Haslinger sisters was organised in the place where the old Serllana shop used to be. Elevated Romanian and Hungarian public participated to the opening of the show. Art critics praised the portraits, landscapes and studies presenting balanced colours and lines well adapted to the subject and composition. The same month, seven painters from Bucharest exhibited over one hundred paintings at the Japport confectionery located in Queen Marie Square. Some of the best were Săndulescu, with flowers and fruits painted in vivid colours, and Octavian Rațiu, with nudes and pastels. The art loving public of Oradea purchased several paintings, particularly because they had the opportunity to pay in several instalments. Another artist from Bucharest organising a show in Oradea was R. Maximilian. His painting used a rich range of colours and he had great painting resources. His fifty works seized states of mind, as his art passed through an inner filter. The artist succeeded in painting different images, from the proletarian drowning his sadness in alcohol to the seller happy for earning some money after an exhausting working day. In April, Amelia Berde's exhibition seized the author's inner feelings, her intuition and artistic call (Expoziția Molnar, 1935, p. 2; Pictură, no. 1415, p. 6; Expoziția, Haslinger, no. 1422, p. 2; Expoziția, bucureșteni, no. 1423, p. 2; Expoziția, Mazimilian, no. 1490, p. 7; Pictura d-nei Amalia, no. 1468, p. 3).

A graphics exhibition of china-ink and colour drawings was presented by painter Andrei Sebö to the public in Oradea in 1937. An interested painting was entitled *Nimic nou pe frontul din vest* (*Nothing New on the Western Front*). The painting *Geneva* also aroused the interest of the participants. It depicted the great hall of the United Nations, where a politician was speaking about peace, while a soldier ready to attack was standing in the shadow. Other works, such as *Război* (*War*), *Înmormântare* (*Funeral*), *Cerșetorul* (*The Beggar*) had a depressing and bleak aspect where suffering and spiritual unrest were vividly rendered through a modern line. The local public was used to such shows, as there were precedents leading to cultural-artistic moments in the memory of the city of Oradea. The international exhibition of graphic arts organised by the Romanian Union of Pressmen Workers was opened on the 7th of September 1924 in the presence of local cultural and administrative officials. The show open to the public was made of the best prints and lithography works coming from Austria, France, Belgium, the Netherlands, Germany, Czechoslovakia, and Romania. The best national works were displayed by artists coming from Cluj, Brașov, Sibiu, Timișoara, Arad, Târgu-Mureș, and Oradea (*O frumoasă expoziție*, 1937, p. 5; Expoziția internațională, 1924, p. 3).

Due to the endeavours of the magazine *Arta și omul*, Oradea benefitted from an art show that gradually turned into the cultural life of the city. Opened on the 21st of January 1937 with a speech delivered by Professor G. Oprescu, a well-known art critic of the time, the show was hosted by the pavilion of the Bihor “Amicii Naturii” Society. The art loving public had the opportunity to admire works exhibited particularly by Romanian artists from Bucharest, such as D. Sevastian, C. N. Constantinescu, Dumitrescu-Șercaia, I. Enescu, etc. We also have to notice the exhibition of painter D. Tibor in September 1937. His paintings were appreciated in the capital, where he had a show in the Art Hall. The artist surprised the public with the variety of subjects combining elements of still nature, landscapes, numerous scenes depicted from everyday life in the Romanian countryside, etc. (Un salon de artă, 1937, p. 3; Deschiderea, no. 229, p. 4; Vernisajul salonului, no. 231, p. 7; Vernisajul salonului, no. 428, p. 5).

Smaranda N. Mihăiescu’s artistic creation was known to the local public through the painting exhibition held at the Journalists Club in Oradea in February 1938. Landscapes, such as *Parcul Bucureștilor sub ceață* (*Foggy Park in Bucharest*), *Păunii* (*The Peacocks*), *Valea Prahovei* (*The Prahova Valley*) attracted the public impressed by the naturalness of the compositions provided by the colours (Expoziția, 1938, p. 2).

At the end of the same year, artist Magda Popescu opened a new show in Oradea. It was interesting due to the paintings resembling a silk tapestry. The fifty works comprised different compositions, such as pastels, flowers, nudes, still nature, but also portraits of personalities (King Ferdinand, Queen Mary, A.C. Cuza, Cincinat Pavelescu). The public praised the fine features of the painting and the work *Golgota* (*Golgotha*) touched the visitors (Expoziția Magda Popescu, no. 756, p. 3).

The public in Oradea had the opportunity to admire painting exhibitions in 1939 too, although their number considerably decreased because of the deteriorating political situation in Europe. One of the best shows was organised by painter Bărăt Mauriciu at the local “Bazaar”. It opened to the public until the first days of the year 1940 (Noua Gazetă, 1939, p. 7).

These significant moments in the plastic arts in Bihor and in the country show that at that time, Oradea and Bihor in general were up-to-date on the cultural and artistic realities occurring at the beginning of the 20th century.

The suggestive expression of the artists in Bihor was diverse from both the conceptual and professional points of view. They succeeded in drawing people’s attention through exhibitions to a new sort of “show” with an educating and training role. Throughout the interwar period, the society in Bihor was little by little drawn to this new perspective of perceiving the cultural act, the education of the spirit that was already a lifestyle, a *modus vivendi* in Europe.

An important role in eliminating the mental obstacles in the Romanian society towards such artistic-cultural expressions was played by the press through their columns dedicated to the art, thus managing to convince the public on the importance of

exhibitions, on the development of the complex process of education. We can conclude that art was an important incentive for the endeavours to promote the really representative cultural values in Crişana.

In conclusion, we consider that social and cultural life greatly contributed to the development of self-awareness within the community at the western border of united Romania that stood out in the field of regional and international relations through the act of culture. As a matter of fact, culture was a sensitive barometer for the social-economic and political life of the time, as it was due to it that core elements in the process of nations' recovery and development were identified.

All through the interwar period, local authorities and cultural institutions in Bihor had to "skip gap stages" at a fast pace to catch up with the requirements of the time and with the cultural-economic projects forwarded by the central leaders of the state. It was a difficult phenomenon to achieve considering that society was facing material deprivation, a high rate of illiteracy, obvious deficiencies in public education and religious life, etc.

Under the circumstances, they rightfully laid stress on the project of educating the Romanian society. The main state institutions and the numerous cultural associations and reunions were called to implement the programme of cultural and economic development at a large social scale.

In order to support this important process, they established the Great Cultural Reunion „Cele Trei Crişuri” in Oradea, whose aim was to develop together with the most representative intellectuals, irrespective of their ethnicity and confession, a significant cultural activity. It was about reducing a historical shortcoming and connecting the cultural life in the west (Banat, Crişana and Maramureş) with the real and deep flow of the regional and national spirituality. Previous obstacles were to be overcome through a dynamic, determined and joint action, i.e. interethnic communication in the cultural field. Thus, the interwar Bihor with its particularities and defining elements as a western region of Romania sought to adjust to the common flow of regional and national culture, a reality to which contributed both people and institutions with the ardent urge towards progress and synchronisation with the realities of the interwar western world.

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GABRIEL MOISA

LOCAL COMMUNITIES FROM BIHOR COUNTY IN THE CONTEXT OF INTER-WAR PARLIAMENTARY ELECTIONS IN ROMANIA

After unification, the political Bihor County life experienced substantial changes absolutely necessary to fit to the administrative structure of the Great Romania. In political terms, since the early 20's, the most of the Romanians of Bihor County were subordinated to the most important party in Transylvania, the Romanian National Party, while the Hungarians adopted immediately after unification a political attitude circumscribed to passivity. After this period, the political life will greatly diversify in Transylvania together with the offensive of the parties in the Old Kingdom while the Hungarians will gradually accept to engage themselves in the political affairs of the city and country.

During the interwar period, Oradea was a cosmopolitan city. As we have seen, the Romanians were not the majority population. Those who dominated the city under demographic and economic aspect were the Hungarians and Jews.

The parliamentary elections on November 2-8th in 1919 were the first in the history of Romania held under universal suffrage. The General Arthur Văitoianu's Government (September 27th - November 28th 1918) had as main mission the very organization of these elections. The ballot was also the first to which the Romanians took part from all the historical provinces united with Romania.

Văitoianu's Government was closely controlled by Ion I. C. Brătianu. That is why the government kept in its administrative functions mayors and prefects, so, just those who organized the election (Mamina, Scurtu, 1996, p. 32). Under the conditions the whole apparatus belonged to the National Liberal Party, three of the major parties of the Romanian political spectrum, the People's League, the Conservative Democrat Party and the Socialist Party refused to participate to elections believing that they could not take place properly (Mamina, Scurtu, 1996, p. 32). As a Transylvanian and Bihor local specific we need to say that the Hungarians have adopted for these elections the political passivity. Despite of these predictions, the Liberals have not won the election. Important successes have been won by the political parties in the territories recently united with Romania: the Romanian National Party of Transylvania, Peasants' Party of Bessarabia, and the Unification's Democratic Party of Bukovina. These were the main beneficiary of the election. The elections on November 2-8th in 1919 also meant the beginning of the marginalization of the conservative parties in the context of introducing the universal suffrage.

Accordingly, in Bihor County, where the political parties in the Kingdom did not organize local political structures, the election favored the most powerful local political party in Romania, the Romanian National Party. Moreover, it was the only political party which was seriously electioneering in Oradea and Bihor County. However, not everywhere the political candidates have won. In total, the organization of Bihor County Romanian National Party sent in the Parliament of the Great Romania 23 representatives: 18 deputies and 5 senators (Patria, 1919, p. 2).

Members:

Successful candidate	Constituency
Justin Ardelean Dumitru Ionaș	Oradea I – II
Constantin Pavel	Beiuș
Gheorghe Crișan	Vașcău
Aurel Pinția	Beliu
Gheorghe Miculaș	Criștior
Petru E. Papp	Răbăgani
Dumitru Lascu	Cefa
Teodor Popa	Tileagd
Lazăr Iacob	Aleșd
Sever Sălăjan	Sălard
Emeric Vaina	Barcăul Mare
Iuliu Chiș	Marghita
Gheorghe Moroianu	Borodul Mare
Ioan Iacob	Ceica
Victor Pop	Leta Mare
Aurel Lazăr	Tinca
Nicolae Roxin	Salonta

Senators

Coriolan Pop	Oradea
Partenie Cosma	Beiuș
Andrei Ille	Salonta
Gavril Cosma	Ceica
Roman Ciorogariu	Aleșd (Patria, 1919, p. 2)

Although the Romanian National Party conducted a very active campaign, not all over the official candidates of this party had prevailed. In this way, people who were not official candidates of the party or independents managed to gain access to the Parliament. Thus, at Săcuieni, the Count Nesselrode Karoly had prevailed by Gheorghe Pop's

withdrawal. Also, the winners of the districts Oradea II - Dumitru Ionaş, Cefa - Dumitru Lascu, Sălard - Sever Sălăjan were not the official candidates of the party, although they were part of the Romanian National Party³⁶. Interesting is that during the elections of 1919, few representatives of the Social Democratic Party also took part in several constituencies. We need to mention here Adrian Deseanu at Vaşcău and Kóos Mozés at Salonta. Like the other Transylvanian parliamentarians, those of Bihor County arrived in Bucharest on November 18th 1919 being welcomed by Vasile Goldiş (Patria, 1919, p. 2).

It should be noted that to the elections of 1919 the Hungarians and Jews in Oradea and Bihor County, like those of the whole of Transylvania, adopted a passive policy attitude. It was their way of protesting against the territorial consequences of the World War I.

Before the elections at the beginning of June 1920, by the law decree of May 2nd 1920, all the electoral districts of Transylvania were reorganized. As a result the Bihor County had 10 constituencies for the Chamber of Deputies (Oradea, Beiuş, Beliu, Ceica, Aleşd, Salonta, Tinca, Sălard, Tileagd, Marghita) and five for Senate (Oradea, Beiuş, Tileagd, Marghita, Salonta).

This time, more political parties were engaged in the battle. Together with the Romanian National Party, in the heat of the electoral battle also was powerfully engaged the People's Party. It has created its subsidiary in Bihor County since the spring of 1920, mainly due to the insistence of Alexandru Averescu and Octavian Goga, who had been present in Bihor several times in the interval between the elections of 1919 and the beginning of June 1920 (Zainea, 2007, p. 253).

In Bihor County, the elections were held on June 3-4th 1920 for Chamber and, on June 6-7th 1920 for Senate. The Romanian National Party candidates were confronted with those of the People's Party in all the electoral districts. The People's Party was an ally of the Liberals who had not an established organization in Bihor County. From the Romanian National Party have candidate for the Chamber the following:

Candidate	Constituency
Justin Ardelean Dumitru Ionaş	Oradea I – II
Gheorghe Crişan	Beiuş
Aurel Pinţia	Beliu
Teodor Popa	Tileagd
Grigore Egri	Sălard
Iuliu Chiş	Marghita

³⁶ In Oradea II the official candidate was Gelu Egri, Salonta - the priest Petru Popa, Sălard - Dumitru Oros. These three have been left behind either because of withdrawal from the race - Gelu Egri, or because their counter candidates enjoyed the support of the inhabitants of those districts. The case of Dumitru Ionaş and Sever Sălăjan.

Gheorghe Moroianu	Aleșd
Nicolae Zigre	Ceica
Aurel Lazăr	Tinca
Dumitru Lascu	Salonta

Senators

Demetriu Kiss	Oradea
Ioan Bușița	Beiuș
Mihai Pavel	Marghita
Vasile Teuca	Salonta (Patria, 1919, p. 2)

The People's Party had itself candidates in every constituency, evidence of a better organization of the local branch of this political party. The candidates for the Chamber were:

Candidate	Constituency
Octavian Goga	Oradea
Alexandru Averescu Cristian Musceleanu	Beiuș
Iacob Lazăr	Aleșd
Nicolae Firu	Marghita
Constantin Banu	Ceica
Ioan Haidu	Tinca
Ioan Iacob	Tileagd
Petru Vuruclăș	Sălard
Nicolae Roxin	Salonta
Gheorghe Tulbure	Beliu

Senators

Iosif Diamandi	Oradea
Gavril Cosma	Beiuș
Andrei Horvath	Tileagd
Nicolae Bataria	Marghita
Ioan Pop	Salonta (Nagyváradi Napló, 1920, p. 2)

The elections in Bihor County were not held just in the best conditions. The abuses of the prefect George Bacaloglu, assisted by the general school inspector, George Tulbure, under the patronage of Alexandru Averescu's government, based since March 13th 1920 (Scurtu, 1996, p. 74), left their mark on the electoral campaign and election results. The government wanted to take all the measurements to winning the elections in Bihor by requiring as prefect the Colonel Gheorghe Bacaloglu. The pressures have gone

so far as in the districts of Beliu, Ceica, Marghita and Tileagd, the candidates of the Romanian National Party were unable to submit their application or were forced to withdraw them. The aim was to defeat by any means the representatives of the Romanian National Party. The irregularities under the patronage of the Averescu Government's Prefect of Bihor were so large and obvious that, in one of the first meetings of the Chamber, the People's Party president himself, Alexandru Averescu, acknowledged their existence (Patria, 1919, p. 2).

In this situation, the representatives of the Romanian National Party had prevailed only in two constituencies of 10. This is about Aurel Lazăr at Tinca and Dumitru Lascu at Salonta. The remaining 8 were in favor of the following representatives of the People's Party: Octavian Goga in Oradea, Cristian Musculeanu at Beiuș, Iacob Lazăr at Aleșd, Constantin Banu at Ceica, Gheorghe Tulbure at Beliu, Nicolae Firu at Marghita, Ioan Iacob at Tileagd and Petru Vuruclăș at Sălard (Nagyváradi Napló, 1920, p. 1-2).

In the June 1920's elections have also candidate with real chances a number of independents who obtained a considerable number of votes. Thus, at Aleșd participated Ioan Câmpeanu and Petru Dejeu. Of the 2822 valid votes, the first obtained 255, and Petru Dejeu 831. In the constituency of Sălard also participated as an independent Nesselrode Sandor. Of the 2513 formulated votes, Nesselrode Sandor received 640. In the constituency of Oradea, Ioan Pelle has candidate as an independent for the Chamber. He won only 16 of the 353 valid formulated votes (Zainea, 2007, p. 256).

An interesting fact by the concerned person has happened in the constituency of Beiuș. There has also candidate the head of Alexandru Averescu's Government, from the People's Party. The result was catastrophic. He got only 7 votes. As a result, the validation of the elections in this was the settled down during the meeting in the Chamber of Deputies on July 15th 1920, just not to remember the extremely poor result obtained by the General Averescu. However, the elections from here have been won by the other representative of the Averescu's Government, Cristian Musculeanu (Zainea, 2007, p. 256).

Like the elections in 1919 and those in 1920 the Hungarians of all county's constituencies did not participate to the elections. The extremely low turnout in Oradea, only 355 voters, shows the relative small share of the Romanian electorate of Oradea. However, the Hungarians and Jews, first of all their press, had a positive attitude to the representatives of the People's Party in the detriment of those of the Romanian National Party, their former "political enemies" on local level. It was considered, perhaps, that the representatives of this party will have more understanding for Hungarians and Jews, knowing the nationals' attitude until then.

In late 1921, the Alexandru Averescu's Government fell. Its place was taken surprisingly, on December 17th 1921 by a government led by Take Ionescu (Mamina, Scurtu, 1996, p. 41). It did not last more than a month since follow-up of a vote of censure received from the Parliament on January 17th 1922 he was forced to resign. It was only a transitional government to a new Liberal government. As Nicolae Iorga also said, Take

Ionescu “*felt behind him the glowing passion of ownership of Ion Brătianu*” (Iorga, 1934) early on his investiture. Consequently, the government of Ion I. C. Brătianu was formed on January 22nd 1922. On January 23rd 1922 the Parliament was dissolved announcing the holding of elections (Mamina, Scurtu, 1996, p. 44). This held the elections for the Constituent National Assembly in March 1922. Continuing already a tradition that has tended to institutionalize, the liberals closely controlled the electoral campaign and therefore the election results.

In Bihor County, the reality was as much as possible annoying for the opposition parties. The most widely used method of obstruction and removal of the opposition candidates, particularly those of the Romanian National Party, was the rejection of its candidates.

There were 10 constituencies for Chamber and 5 for Senate in Bihor. The National Party’s candidates were rejected in 8 of the 10 constituencies, at Aleșd, Beiuș, Ceica, Tileagd, Sălard, Marghita, Beliu and Oradea. The crudest abuse took place in the constituency of Sălard, where the Liberal prefect Sever Andru candidate. There, the chairman of the election commission has invalidated all the others who wanted to submit their applications because they had not submitted their certificates of good character (Zainea, 2007, p. 257). In this context, basically, in five districts have not held elections since the liberal candidates have stood the electoral test without facing the electorate in the absence of other candidates. Elections were actually held in only two constituencies at Tinca, where the favorite of the population, Aurel Lazar, the representative of the Romanian National Party, had prevailed to the Liberal Ioan Câmpeanu and Pavel Toncescu and, at Salonta, where also won the representative of the Romanian National Party, Dumitru Lascu, a very known character in the area, in the detriment of the liberal representative, Iacob Niște. As a result of the electoral realities in Bihor County, the nationals have had prevailed only in a single Senatorial constituency, in Oradea, in the person of Demetriu Kiss (Zainea, 2007, p. 257).

In Bihor, during the elections held on March 7-8th 1922, the Liberal candidates were confronted with the candidates of Averescu and the national ones. From the Romanian National Party the following candidate for Chamber and Senate:

Candidate	Constituency
Sever Erdely	Oradea I – II
Ioan Sferlea	Aleșd
Petru Popovici	Beiuș
Aurel Pintia	Beliu
Victor Pop	Ceica
Sever Selegian	Marghita
Dumitru Lascu	Salonta
Aurel Lazăr	Tinca

Grigore Egri	Sălard
Iosif Tărău	Tileagd
Senators	
Demetriu Kiss	Oradea
Iosif Maiorescu replaced with Aurel Lazăr	Beiuș
Iacob Radu	Marghita
Vasile Teuca	Salonta
Nicolae Poenaru	Tileagd (Patria, 1919, p. 2)

The Liberal Party had to its turn candidates in each constituency. The candidates for Chamber and Senate were:

Candidate	Constituency
Nicolae Zigre	Oradea
Ion I. C. Brătianu	Ceica
gen. Traian Moșoiu	Aleșd
Constantin Banu	Beiuș
col. Atanasie Negulescu	Beliu
Vasile Chirvai	Marghita
Sever Andru	Sălard
Iacob Niște	Salonta
Ion Câmpeanu	Tinca
Nicole Zigre	Tileagd
Senators	
Gavril Cosma	Beiuș
gen. Dumitru Iliescu	Tileagd
Dumitru Marian	Marghita
Alexandru Munteanu	Salonta (Tribuna, 1922, p. 3)

The People's Party did not submit decisive applications in all the constituencies. Thus, the Averescus have presented for elections with the following candidates for Chamber:

Candidate	Constituency
Gheorghe Tulbure	Beliu
Ioan Iacob	Ceica
Lazăr Iacob	Aleșd
Nicole Firu	Marghita
Romul Fersigan	Sălard
Iosif Iacob	Salonta

Pavel Toncescu	Tinca
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For Senate the People's Party filed applications only in two constituencies, Oradea and Tileagd:

Iosif Diamandi	Oradea
Andrei Horvath	Tileagd

The Hungarians, a demographic and social component extremely important to the Bihor County level, have applied candidatures only in some constituencies. They were still divided politically and with little chance of success. Thus, in Oradea, Ioan Kocsán has submitted his application, he subsequently withdrew and his place was taken by Iosif Willer, and at Sălard, Eugen Kótzo, at Marghita, Sudi Tibor and at Tileagd, Kóthelyi Zoltán (Tribuna, 1922, no. 29, p. 1).

The abuses of the liberal authorities, which took place during the election campaign, have not remained without consequences. Preventing the application was the ultimate form of interference of the liberal power. In fact, this kind of pressure has been put in practice also in other counties in Transylvania. Of the 121 constituencies from here, in no fewer than 29, the candidates, others than those of the Liberal Party were unable to submit their application (Patria, 1922, p. 2). Bihor County was one of the leading in electoral abuses since of the 29 constituencies with problems in Transylvania, 8 were in Bihor County. All these, the opposition's protests in Parliament made that in three constituencies in Bihor, where elections were not actually held, Aleşd, Ceica and Tileagd, to run elections on May 28-29th 1922 (Zainea, 1999, p. 210).

After the general elections on March 7-8th 1922 and of the part ones on May 28-29th 1922, the Bihor County sent to the Romanian Parliament the following deputies and senators:

Deputies:

Nicolae Zigre	Oradea - National Liberal Party
gen. Traian Moşoiu	Aleşd - National Liberal Party
Constantin Banu	Beiuş - National Liberal Party
col. Atanasie Negulescu	Beliu - National Liberal Party
I.I.C. Brătianu	Ceica - National Liberal Party
Vasile Chirvai	Marghita - National Liberal Party
Dumitru Lascu	Salonta - Romanian National Party
Aurel Lazăr	Tinca - Romanian National Party
Sever Andru	Sălard - National Liberal Party
Iosif Tărău	Tileagd - Romanian National Party

Senators

Demetriu Kiss	Oradea - Romanian National Party
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Gavril Cosma	Beiuș - National Liberal Party
Dumitru Marian	Marghita - National Liberal Party
Alexandru Muntean	Salonta - National Liberal Party
gen. Dumitru Iliescu	Tileagd - National Liberal Party

As one can see, the Liberals have taken the most of the mandates of deputies and senators at the elections in March - May 1922. The abuses and the pressures of the local liberal authorities under the patronage of I. I. C. Brătianu's Liberal Government, have fully contributed to this situation. Almost the entire state apparatus was controlled by I. I. C. Brătianu's Government. To this was added that all the chairmen of the electoral constituencies were appointed by the same liberals (Zainea, 1999, p. 209).

The year 1926 meant the end of the first mandate for four years of a government of the interwar Romania. On March 27th 1926 four years came true since the election of the Romanian Legislative Bodies. Under these conditions Ion I. C. Brătianu, the head of the government, has brought his mandate leaving open the way for new elections. On March 30th 1926 the General Alexandru Averescu was appointed to form a new government. The Government Averescu was the one which organized the new elections on May 25th 1926 for the Assembly of Deputies and, on May 28-31st 1926 for Senate (Mamina, Scurtu, 1996, p. 58).

Before the parliamentary elections, in Bihor County were held the communal elections. For this election, in Bihor there were made up two groups: the United Opposition composed of the organizations of the National Party, the Peasant Party, the People's Party, the Workers' Block and the Zionist Organization, on one hand, and on the other hand, the electoral cartel formed by the Liberal Party and its allies, the Hungarian Party and the Social – Democrat Party. The communal elections resulted in the victory of the opposition. In Oradea, of the total of 9 235 formulated votes, the United Opposition received 4 560, and the list of the Liberal -Hungarian – Social - Democratic cartel 4 402, 181 votes being rejected and, 91 canceled (Zainea, 2007, p. 257).

In order to overthrow the Averescu's Government supported by liberals, for the parliamentary elections at the end of May 1926, the nationals and peasants concluded an electoral alliance that would bring all over the country common lists. Following further debate about the composition of the common lists, in Bihor the pact was not implemented. Therefore, the two political parties submitted separate lists. On the list submitted by the National Party there were to be found, for the Chamber of Deputies, the following: Aurel Lazar, Iosif Miorescu, Iosif Tărău, Grigore Gafencu, Vasile Bledea, Gheorghe Sofronie, Teodor Popa, Victor Cădere and Ulpiu Traian Gomboșiu and, for the Senate: Dumitru Lascu, Demetriu Kiss, Grigore Egri, Teodor Rocsin and Ioan Costa (Dreptatea, 1926, p. 1). On the peasants' list were: Anastasius Mavrodin, Ioan Silaghi, Gheorghe Balc, Gheorghe Popescu-Ceica, Victor Felea, Vasile Stupariu, Mihai Balogh, Nicu Anghel and Iuliu Kurutz (*Tribuna*, 1926, p. 2).

In addition to these two political parties, in Bihor County have also brought lists for the parliamentary elections the organizations of the People's Party, the Liberal Party, the Workers' Block and the anti-Semitic League. The Hungarian Party and the German Party brought candidates on the lists submitted by deputies and senators of the People's Party, under a pact concluded between these political parties at Ciucea.

Like the other electoral campaigns, this also was characterized by a series of violence even controlled by the Averescu's Government. It had been decreed the martial law and imposed the censorship. The aim was that the government lists have prevailed. All of them were taking place under the eyes of the prefect Iosif Iacob. The electoral meetings of the opposition have been banned and, some of the press bodies suspended. A number of candidates have been intimidated being also reported many attempts to influencing the outcome of voting by preventing a part of the electorate to carry up its voting papers, or even to vote (Zainea, 2007, p. 258).

Although the elections were held by Averescu's Government, in Bihor County, the elections for Chamber were clearly won by the National Party. But, however, no representative of the National Party has entered the Chamber because of a "misunderstanding". It was argued that in Bihor, the nationals and the peasants had brought common list although at a national level this was happening everywhere. However, they had received the approval from the Central Election Commission to use the same parallel fence and, the votes on the two lists to be considered as votes obtained by the opposition. When distributing the votes, however, the Central Election Commission went into account of the National - Peasant opposition only the votes obtained by the peasant list, 257³⁷ and, those on the list of nationals, 31,451, were passed on the behalf of the Government lists. There were disputes, particularly of Iuliu Maniu, and, although the Central Election Commission has accepted it had been wrong, its representatives said they can not do anything because the list of the deputies of the People's Party in Bihor had already appeared in the Official Gazette (Zainea, 1999, p. 210). As Octavian Goga had been elected deputy of Bihor, Cluj and Sibiu on the Government lists, and he chose to represent Sibiu, on September 6th 1926 in Bihor new elections were held. Mihail Sadoveanu came out on top, whose nomination was submitted by the Government, in the detriment of the national Dumitru Lascu. Neither this electoral campaign was a quiet one. There were many abuses reported by the local media (Patria, 1926, p. 1). The appeals made to that effect had no purpose.

In the Senate, the victory went to the People's Party organization, the beneficiary of a general competition in the entire state apparatus in the county, which received 19,438 votes, followed by the National Party organization with 14,537 votes, the anti-Semitic

³⁷ The peasant organization was a very poor one in Bihor during the respective period, reducing to a group of people around the organization's President, Anastasie Mavrodin.

League with 1229 votes and the Liberal Party organization with 887 votes (Tribuna, 1926, p. 3).

At the request of King Ferdinand, on June 4th 1927, the General Alexandru Averescu had to bring the mandate to the government. Even the same day it was formed a government led by Barbu Știrbey, brother-in-law of Ion I. C. Brătianu and a close friend of Queen Mary (Manoilescu, 1992, p. 92). The government was one of National Unity getting representatives of several parties: the National - Peasant Party, the National Liberal Party, the Peasant Party (Dr. Lupu), independent (Mamina, Scurtu, 1996, p. 60). The Barbu Știrbey's Government has resisted only until June 20th 1927 when, at the suggestion of Ion I. C. Brătianu, the liberal ministers withdrew from the government which led the Prime Minister to bring the mandate to the Government. The maneuvers of the great Romanian politician Ion. I. C. Brătianu were resultful again, so on June 21st 1927 it was constituted a new government Ion I. C. Brătianu (Mamina, Scurtu, 1996, p. 62). Immediately after the government had been installed, also the data of the parliamentary elections was established: July 7th 1927 for Chamber of Deputies and July 14th 1927 for Senate. Winning them was a key issue for the government. For this, they did not spare any effort.

These realities have been visible in Bihor County, too. As on other occasions, the local authorities have involved heavily in the favor of the government lists. The liberal prefect, Dezideriu Tempelean, has forbidden the national - peasants meetings in Oradea and county, they being seen as the main danger to the liberal organization. As this order was not complied, they proceeded to the arresting of some leaders of the National Peasant Party present at the electoral meetings. This fate was shared by: Victor Cădere arrested at a meeting at Marghita, and Aurel Lazar (Zainea, 1999, p. 238).

From the National Liberal Party, for Chamber, the following applied:

Gen. Traian Moșoiu	National Liberal Party
Iosif Tărău	National Liberal Party
Ion Fițescu	National Liberal Party
Tiberiu Moșoiu	National Liberal Party
Ulpiu Traian Gomboșiu	National Liberal Party
Petru Fodor	National Liberal Party
Vasile Bledea	National Liberal Party
Ion Picu Băncilă	National Liberal Party
Mihai Turla	National Liberal Party (Dreptatea poporului, 1927, p. 1)

For Senate the liberal list contained five names:

Demetriu Kiss	National Liberal Party
Dumitru Lascu	National Liberal Party

Iuliu Chiș	National Liberal Party
Mihai Poynar	National Liberal Party
Titu Trif (Nagyváradi Napló, 1927, p. 1)	National Liberal Party

Of the National Peasant Party, the following applied their candidature for Chamber:

Alexandru Vaida-Voievod	National Peasant Party
Aurel Lazăr	National Peasant Party
Iosif Maiorescu	National Peasant Party
Gheorghe Crișan	National Peasant Party
Teodor Rocsin	National Peasant Party
Victor Cădere	National Peasant Party
Petru popovici	National Peasant Party
Mihai Pop	National Peasant Party
Enea Popovici (Tribuna, 1928, no. 51, p. 3)	National Peasant Party

For Senate the national peasant list of Bihar contained five names:

Nicolae Zigre	
Vasile Teuca	
D. Hurmuzescu (Tribuna, 1928, no. 51, p. 3)	

At a national level the parliamentary elections were won by the National Liberal Party which won 61.69% of the total votes, while the National Peasant Party only 22.09% (Mamina, Scurtu, 1996, p. 64).

In Bihor County the elections in 1927 had similar results. Of the total of 66,465 formulated votes, the organization of the Liberal Party received 29,765, representing 45.6%. The organization of the National Peasant Party positioned on the second place with 19,242 votes, representing 29.1%. They followed, in order, the organization of the Hungarian Party, with 8 541 votes (12.1%), the Workers' Block, with 5 203 votes (7.3%) and the Social - Democrats with 2 214 votes (5.1%) 27. Of nine mandates of deputies which had been distributed in Bihor County, eight were for the Liberal organization and only one returned to the National Peasant Party (Zainea, 1999, p. 239). Of the National Peasant Party was elected Alexandru Vaida Voevod, but because he also won the elections in Cluj he resigned his mandate of Bihor in favor of Aurel Lazar.

The representatives of Bihor in the Chamber of Deputies were:

Gen. Traian Moșoiu	National Liberal Party
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Iosif Tărău	National Liberal Party
Ion Fiñescu	National Liberal Party
Tiberiu Moşoiu	National Liberal Party
Ulpiu Traian Gomboşiu	National Liberal Party
Petru Fodor	National Liberal Party
Vasile Bledea	National Liberal Party
Ion Picu Băncilă	National Liberal Party
Alexandru Vaida Voevod	National Peasant Party (Nagyváradi Napló, 1927, p. 2)

On November 3rd 1928, Vintilă Brătianu presented to the Regency the resignation of his cabinet. After the unsuccessful attempt to set up a national unity government chaired by Nicolae Titulescu, the Regency entrusted Iuliu Maniu to constituting a new government (Scurtu, 1996, p. 105). The National Peasant Party came thus to the government. The government has set the parliamentary elections for December 1928. In preparation for elections, Iuliu Maniu's Government moved to replace the Liberal prefects with some National - Peasants.

In Bihor County was named as prefect Iosif Maiorescu. Also, both at the Prefecture and the Oradea City Hall, the old liberal interim committees were replaced by new ones formed by National - Peasants. The head of the committee of the Prefecture was Teodor Rocsin and, at Oradea City Hall, Aurel Lazar (Tribuna, 1928, p. 5; no. 48, p. 3).

Most of the analysts believe that the December 1928 elections were the most democratic of all Romanian interwar period. This is also supported by the suspending of the censorship by the Council of Ministers on November 19th 1928, in all regions where it was active. An exception was a strip of 10-15 km from the border area. In case of the county capital cities that were inside this strip the censorship was also suspended. Oradea was in this situation.

To winning the election, the Bihor County organization of the National Peasant Party has concluded electoral agreements with the Social Democratic Party and the Zionist movement (Tribuna, 1928, no. 49, p. 2). These parties received a place on the lists of deputies of the National-Peasant Party. It was the Social Democrat Iosif Jumanca and Tivadar Fischer of the Zionist movement (Tribuna, 1928, no. 51, p. 3).

The complete list of the National Peasant Party for Chamber included the following candidates:

Aurel Lazăr	National Peasant Party
Gheorghe Crişan	National Peasant Party
Victor Cădere	National Peasant Party
Teodor Rocsin	National Peasant Party
Teodor Popa	National Peasant Party

Petru Popovici	National Peasant Party
Gh. Popescu Ceica	National Peasant Party
Enea Popovici	National Peasant Party
Nicolae Pop	National Peasant Party

The following candidates were for Senate:

Demetriu Kiss	National Peasant Party
Sever Erdely	National Peasant Party
Iuliu Chiș	National Peasant Party
Gelu Egry	National Peasant Party
Titu Trif (Tribuna, 1928, no. 51, p. 3)	National Peasant Party

In Bihor, the elections in December 1928 were won by the National Peasant Party organization. Of the 83 578 formulated votes, it has managed to collect 54,451, representing 62.2%, followed by the Hungarian Party organization, with 16 155 votes (19.2%) and the Workers' Block with 7 332 votes (8.7 %). The other political parties have obtained: the National Liberal Party (1 575), Lupu's Peasant Party (1 562) and the People's Party (1 397), a number of 1 120 votes being canceled and 630 rejected (Monitorul, 1929, no. 2, p. 16).

Following these results, the National Peasant list sent in Chamber the following representatives:

Aurel Lazăr	National Peasant Party
Gheorghe Crișan	National Peasant Party
Victor Cădere	National Peasant Party
Teodor Rocsin	National Peasant Party
Teodor Popa	National Peasant Party
Gh. Popescu Ceica	National Peasant Party
Iosif Jumanca	Social Democrat Party
Tivadar Fischer	Zionist Movement

The Hungarian Party in its turn sent a representative in the person of Iosif Șandor (Monitorul, 1929, no. 2, p. 16). On the occasion of the opening of the Parliament's works on December 22nd 1928, Aurel Lazar was elected Vice President of the Chamber of Deputies.

The period November 1928 - November 1933 was quite agitated in the Romanian political life. The impact of the economic crisis on the parliamentary activity was a significant one. In those four years, at the helm of the country were no less than nine successive governments and three parliamentary elections were held, although the length

of a term was of four years. Neither in Bihor County things was better, the Bihor political life being full of events and seizures.

On April 4th 1931 Gh.Gh. Mironescu brought forward the government's resignation. After the longest government crisis in the interwar period his leading place at the Council of Ministers was taken by Nicolae Iorga, beginning with April 18th 1931. On April 30th Nicolae Iorga announced from the rostrum of the Chamber that new parliamentary elections had been fixed. These were going to be held on June 1st for Chamber and, on June 4-6th for Senate.

On the horizon of the parliamentary elections in the early June, the government signed an electoral cartel with I.G. Duca, the leader of the National Liberal Party. It was called the National Union. In fact, nationally, it won the elections obtaining 47.49% of the votes, on the following place, the National Peasant Party with 14.99%. The National Union sent 289 deputies in Chamber, and the Peasant Party 30 deputies. On the following places, far, have been placed the Liberal-National Party - Gh. Brătianu with 5.95%, The People's Party with 4.92%, the Hungarian Party with 4.75%, of the National Christian Defense League with 3.89%, the Peasant Party - Dr. Nicolae Lupu with 3.44%, the Social Democratic Party with 3.25%, the Democratic Peasant Party in cartel with the League against usury with 2.75%, the Workers' Block with 2.52%, the Jewish Party with 2.19% (Scurtu, 1994, p. 167).

In Bihor County, 10 organizations have submitted lists, namely: the National Union, the National Peasant Party, the Hungarian Party, the Workers' Block, the Peasants Party - Dr. N. Lupu, the National Liberal Party – Gh. Brătianu, the Jewish Party, the People's Party, of the National Christian Defense League, and the Social Democrat Party. In Bihor, it was made a test, failed in fact, by the electoral cartel between the National Union and the Peasant Party group - Dr. N. Lupu, whose chairman in Bihor was Professor Anastasie Mavrodin.

In general, the parliamentary elections in June 1931 were conducted in an atmosphere quite tense (Mamina, Scurtu, 1996, p. 87). Oradea's newspaper *Tribune* revealed this state of affairs. According to it "*The country was studded by police, arrests, beatings, seizure, stop citizens from voting and all what Mr. Argetoianu's evil mind could invent*" (Tribuna, 1931, p. 3). For the results to be those expected, in Bihor County's Prefecture head was sent from Bucharest the general inspector Nicolau. After the election process, his place was taken by Gheorghe Ghica.

In the entire Bihor County there were 75,542 voters actually voted. In the first place, with the most votes, 23,145, representing 30.5%, the National Union stood. Runners were located, in order, the National Peasant Party with 15,402 votes (20.4%), the Hungarian Party with 12,562 votes (16.5%) the Workers' Block with 9077 votes (12.7%), the Peasants Party - Dr. Nicolae Lupu with 4610 votes (6.17%), the National Liberal Party - Gh. Brătianu with 3417 votes (4.53%), the Jewish Party 2575 votes (3.47%), the People's Party with 2275 votes (3.0%), the Social Democratic Party with 1618 votes (2 ,

13%) and the National Christian Defense League with 861 votes (1.3%) (Zainea, 2007, p. 260; Nagyváradi Napló, 1931, p. 1).

At the whole county level the ruling party won at Aleşd, Beiuş Cefa, Ceica, Marghita, Tinca, Tileagd and ranked the second place at Săcuieni, Vaşcău and Ştei; the Hungarian Party won in Oradea, Biharea, Sălard and Săcuieni, topping is in second place at Salonta, Marghita and Tinca; the National Peasant Party had the best electoral at Beliu, Vaşcău and Ştei, being the second at Cefa and Ceica and three at Tinca and Tileagd; the Workers' Block had a large electorate that was in the leadership at Salonta, the second place in Oradea, Aleşd, Beiuş, Biharea, Sălard and, the third place at Marghita; the Jewish Party received more votes in Oradea and Săcuieni, in both sites being situated on the third place.

The government Nicolae Iorga lasted a little longer than a year, between April 18th 1931 and May 31st 1932. The times were troubled, and the economic crisis on the work of this office aggravated seriously. On June 6th 1932 King Carol II appointed as Chairman of the Council of Ministers the National Peasant Alexandru Vaida Voevod. His mandate was well stated. In his investiture speech, Alexandru Vaida Voevod said that the main task of the cabinet was to hold free elections. The new elections were set for July 17th 1932 for Chamber, and July 20-26th for Senate (Mamina, Scurtu, 1996, p. 91).

The election favored the National Peasant Party. It achieved 40.3% of the votes, followed by the Liberals with 13.63%. The National Peasants sent 274 deputies in Chamber, while the Liberals only 28 (Mamina, Scurtu, 1996, p. 91). The election campaign was conducted without major incidents. In the electoral battle has been engaged numerous political parties. Not more than 16 political parties disposed on 12 electoral lists obtained more than 2% of the total votes. Following the National Peasant Party and the National Liberal were located in order the following formations: the National Liberal Party - Gheorghe Brătianu (6.53%), the Peasant Party - Dr. Nicolae Lupu (5.72%), the National Christian Defense League (5.32%), the Hungarian Party (4.75%), the National Agrarian Party (3.64%), the Social Democratic Party (3.38%), the Grouping Corneliu Zelea Codreanu (2.37%), the National Union (2.28%), the Jewish Party (2.26%) and the People's Party (2.16%) (Scurtu, 1994, p. 175).

Considering that his mission was fulfilled, Alexandru Vaida Voevod brought his mandate to the government on August 10th 1932 (Mamina, Scurtu, 1996, p. 91).

In Bihor County, things stayed the same. A large number of local organizations have submitted applications for the two Chambers of the Parliament. In all, no fewer than 12 county political organizations submitted their lists: the National Peasant Party, National Liberal Party – I.G. Duca, the National Liberal Party - Gh. Brătianu, the People's Party, the Peasants Party – Dr. Lupu, the National Christian Party - O. Goga, the National Union - N. Iorga, the Hungarian Party, the National Christian Defense League, the Social Democratic Party, the Jewish Party, the Agrarian League and the Conservative Party. There were a total turnout of 72 383 voters. The elections were won by the National

Peasant Party, which received 32 214, that is 44.60%. It was followed by the Hungarian Party with 10 983 votes (15.17%), the National Liberal Party - Duca with 7174 votes (9.9%), the Peasant Party - Lupu with 5 764 votes (7.95%), the National Christian Party - Goga with 2 327 votes (3.21%), the National Union - Iorga with 3 744 votes (5.17%), the Agrarian League with 2 260 votes (3.12%), the Jewish Party with 2083 votes (2.87%), the National Liberal Party - Gh. Brătianu with 1 760 votes (2.43%), the Social Democratic Party with 1 687 votes (2.33%), the Conservative Party with 1 389 votes (3.12%); the last places with an equal number of votes - 499 (0.68%) - were located the People's Party and the National Christian Defense League (Nagyváradi Napló, 1932, p. 1).

Interesting are the results of voting in Oradea. Here, from a total of 7772 voters registered on the electoral lists have voted 7167 (92.3%). Winner was the Hungarian Party that has obtained 3191. On the following places were situated the National Peasant Party (1 074 votes), the Jewish Party (972), the National Liberal Party - Duca (514) the Social Democratic Party (325), the Agrarian League (217), the People's Party (170), the Conservative Party (168), the National Liberal Party - Gh. Brătianu (149), the National Christian Party (143), the Peasant Party - Lupu (113), the National Christian Defense League (53) and the National Union - Iorga (50).

At the level of the whole county the Hungarian Party won, apart from Oradea, at Salonta, Sălard, Biharea and Săcuieni; the National Peasant Party won at Beiuș, Cefa, Tileagd, Marghita, Ștei and Vașcău while the Liberal Party – I. G. Duca was placed only the second at Cefa, the third place at Salonta, Beiuș and Săcuieni, and the fourth in Oradea (Gazeta de Vest, 1932, no. 829, p.1).

The series of the National Peasant cabinets in the interwar period ends in November 1933 with a new government Alexandru Vaida Voevod, activating between January 14th and November 9th 1933. From October 1st 1933, the Liberals led by I. G. Duca, launched a broad campaign to overthrow the government Vaida Voevod. On November 15th 1933 it was going to be held a great anti-government meeting in Bucharest. The government announced that it will not allow this. As a result of a meeting with Carol II, on November 9th 1933, Alexandru Vaida Voevod brought his mandate to the government. Under these circumstances Carol II appointed as Chairman of the Council of Ministers I. G. Duca. The legislative chambers were dissolved and the date of the new elections was announced: December 20th 1933 for Chamber, and December 28-29th 1933 for Senate (Mamina, Scurtu, 1996, p. 105).

Organized by Liberals, the parliamentary elections ended in victory for the National Liberal Party. It achieved 50.99% of the total votes translated into 300 deputies and 100 senators. The National Peasant Party won 13.92% of the votes and 29 mandates of deputies, the National Peasant Party situated on the second place in the hierarchy of the political parties, that fact, placing it in the top of the opposition. The two parties were followed by the Peasant Party - Dr. N. Lupu with 11 mandates, the Liberal National Party - Gh. Brătianu with 6, the National Christian Defense League with 10, the National

Agrarian Party with 9, the Hungarian Party with 9, the Radical Peasant Party with 8 and the Agrarian Union with 5 mandates (Scurtu, 1994, p. 232).

In Bihor County, the Liberals have taken precautionary measures to winning the elections. Thus, the National Peasant prefect Petru Popovici was replaced by the Liberal Ioan Picu Băncilă. Also, the head of the County Election Board was called Alexandru Atanasiu, one near to the liberals and the first President of the Bihor Court. Overall, in Bihor, have been received thirteen nomination lists headed by Tiberiu Moșoiu, the National Liberal Party (Duca), Gheorghe Crișan, the National Peasant Party, N. Zigre, the National Liberal Party (Gh. Brătianu), Ferdinand Hegedus, the Hungarian Party, Aurel Popa, the Agrarian Party, Alex. Mateescu, the Radical Peasant Party, Apostol Zamfir, the Peasant Party - Dr. N. Lupu, Dănilă Vereș, the Independent Peasant Party, Emil Böszörményi, the Social Democratic Party, Nicolae Constantinescu, the Iron Guard, Iosif Fischer, the Jewish Party, Ioan Pop, the People's Party and Emil Grigorescu, the Agrarian Union (Gazeta de Vest, 1933, no. 1111, p. 5; no. 1125, p. 7).

The elections recorded a low turnout, the victory of the ruling party being expected. According to the statistics, 71,835 voters expressed their voting right. The best were placed the representatives of the National Liberal Party – I. G. Duca - 35 139, followed by the National Peasants - 12 745, the George's Liberals - 1905, the Hungarians - 7 604, the National Agrarian Party - 2 754, the Radical Peasant Party - 1 461, the Peasant Party - Lupu - 5 389, the Social Democratic Party - 737, the Jews - 1 538, the Averescu's - 504, and the group Argetoianu – 716 (Gazeta de Vest, 1933, no. 1136, p. 1).

For Senate, at the level of the whole Bihor County, only two political parties have submitted lists, the National Liberal Party (Duca) and the National Peasant Party. The Liberals had prevailed (Gazeta de Vest, 1933, no. 1136, p. 1).

The mandate for four years of Gheorghe Tătăreșcu's parliament and liberal government expired at the end of the year 1937. The Romanian political life had become quite complex. The most important parties: the National Liberal Party and the National Peasant Party were troubled by internal contradictions, and Carol II closely supervised the government that became one of the King's personal. On November 9th 1937, in the conditions the maturity of Tătăreșcu's government mandate was approaching, the king began consultations to form a new government. On November 14th 1937 Gheorghe Tătăreșcu resigned his government. After several consultations with the heads of the political parties, Carol II appointed at the head of a new government the same Gheorghe Tătăreșcu. On November 19th the Parliament was dissolved and new elections were announced, on December 20th 1937 for Chamber and, on December 23-28th for Senate.

Given the political situation in the country, the electoral campaigning for the elections in December 1937 was conducted in an atmosphere quite confusing. They were the last elections held under a democratic spectrum in the interwar Romania. They concluded the most bizarre alliances, among them that concluded between the National Peasant Party and the Iron Guard, which was joined by Gh. Brătianu's liberal party. The

National Peasant Party and the Iron Guard had not brought common lists of candidates (Hitchins, 1998, p. 413).

The electoral campaign has been entered by 13 main political parties and 53 secondary groups. The voting results were surprising. Although it had practically organized the elections, the National Liberal Party won only 35.9% and most places in Chamber. But it did not obtain the 40 percent of votes necessary to gain the first and, together with it, the majority in Chamber. It was an unusual situation. For the first time in the interwar history of Romania, a government was losing the elections it had organized. On second place was the National Peasant Party, which won 20.4%, followed by the party All for the Country with 15.38%, the National Christian Party (9.15%), the Hungarian Party (4.43%), the National Party Liberal - Gh. Brătianu (3.89%), the Radical Peasant Party (2.25%). The last places were ranked by the Agrarian Party (1.70%), the Jewish Party (1.49%), the Social Democratic Party (0.94%) and the People's Party (0.83%). They did not manage to exceed the electoral threshold in order to have representatives in Parliament (Scurtu, 1994, p. 317).

In Bihor, immediately after determining the date of polling day, the lists of candidates both for the Chamber of Deputies and Senate have been submitted. The list of the National Liberal Party organization for the Chamber of Deputies included: Traian Moşoiu, Dr. Petru Popovici (Vaida's), N. Cosma, Dr. Peter Topa (Iorga's), Nae Popescu, A. Andru, Ion Mangra, Sofronie Sângeorgeanu, Virgil Givulescu and A. Barna. The candidates for Senate were Ludovic Bica, Matei Vasiliu and Petrescu-Ercea. From the National Peasant organization for the Chamber of Deputies candidate: Dr. Teodor Roxin, Dr. Teodor Popa, Dr. Romulus Popa, Dr. Gheorghe Popescu-Ceica, Augustin Cosma, Dr. Cornel Vaida, C. Anastasiu, Dr. Petre Mărcuş and Dr. Virgil Vaida. On the list of senators were to be found: Dr. Augustine Ciavici, Iacob Nişte, Dr. Alexander Reti and Traian Neagu (Noua Gazetă, 1937, no. 477, p. 3). In turn, the organization of the Radical - Peasant Party for the Chamber of Deputies was headed by lawyer Nicolae Holescu in Bucharest, the new Chairman of the organization of Bihor, that of the National Liberal Party - Gheorghe Brătianu, Nicolae Zigre, of the National Christian Party the Professor George Bota, and the Social Democratic Party, the lawyer Emil Böszörményi (Noua Gazetă, 1937, no. 482, p. 1; no. 487, p. 4).

The Bihor electoral race has registered 11 political organizations. There were 85,340 voters for voting, but of the total votes 1 324 were canceled (Zainea, 2007, p. 264). Of the remaining, the National Liberal Party won 33 858, the National Peasant Party 17 761, All for the Country 12 210, the Hungarian Party 8 160, the Jewish Party 2 894, the Radical Peasant Party 2 736, the Agrarian Party 1 932, the Liberal Party - Gh. Brătianu 1 609, the National Christian Party 1 490, the last places being occupied by the People's Party (896 votes) and the Social Democratic Party (470 votes) (Nagyváradi Napló, 1937, p. 9). In Oradea eight polling stations were established. The vote had 7 597 voters. The Hungarian Party emerged victorious with 2 261 votes, followed by the National Liberal

Party with 1 366, the Jewish Party with 1 362, the National Peasant Party with 1 288, All for the Country with 537, the Social Democratic Party with 192, the National Christian Party with 90, the Radical Peasant Party with 83, the Agrarian Party with 70, the Liberal Party - Gh. Brătianu with 52 and the People's Party with 35 votes (Nagyváradí Napló, 1937, p. 5).

During the election campaign all parties held an intense activity. The most active propaganda teams were the propaganda teams of the National Liberal Party which crossed the county up and down. They have held numerous popular meetings at Marghita, Borod, Tinca, Salonta, Cefa, Oșorhei, where they spoke to the voters Tiberiu Moșoiu and Petre Topa. The Hungarian Party organization held a large meeting in the hall of the Catholic circle in Oradea involving 400 voters. There have been delivered speeches by Markovits Mano, the chairman of the organization and Ștefan Soos, who underlined the historic importance that the elections on December 20th have had, and the need for the unity of the 180 000 Hungarians in the county in order to send at least three representatives in parliament and, such the Hungarians' interests not to have suffered (Zainea, 2007, p. 263-264).

The election paved the way for the establishment of the authoritarian regime of Carol II. The policy pursued by him in the direction of the division of the parties showed their fruits on the occasion of these elections. Upon learning that the government did not win the elections, King Carol II started to change it before publication of the election results. On December 28th 1937, he accepted the resignation of Tătărescu's Government. Without proceed to the usual consultations with the heads of the political parties, the king appointed Octavian Goga, Chairman of the National Christian Party, to form a new government. Along with this government an important stage of Romania's history ended, one that was held under the auspices of a democratic political system.

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IOAN HORGA, TÜNDE NAGY

**DECENTRALIZATION, LOCAL AND REGIONAL AUTONOMY IN
ROMANIA IN THE LAST 25 YEARS**

In *today's Europe* the role of the state is interpreted from the point of view of some phenomena such as regionalization and European integration. Europe can no longer be just the Europe of the member states but it must develop a forward going strategy alongside the road of the regional cultures, fact which will make more significant the deepening of its democratic values.

The *policy of regional development* is one of the solidarity policies of the EU regarding the harmonious development of the production factors and the equalisation in competitiveness conditions. This policy was started in order to guarantee an equitable repartition of the advantages of a unique market in all the regions and to all citizens. Thus, the actions of the EU foresee the granting of important financial means under the form of *structural funds* and *social economic cohesion funds to the poor countries* and regions and of the transeuropean networks of telecommunication, transport and energy distribution meant to integrate the national networks into a European structure.

Starting with 1975 through the *European Regional Development* important funds were given to disfavoured regions. Following the reform of 1988 the structural funds were established acting in favour of three types of zones:

a) *regions with delayed development*

b) *industrial regions in decline;*

c) *rural zones.* In 1993 with the Maastricht Treaty, the principle of economic and social *cohesion found* its expression in the Cohesion Fund. It was created to help the development of the four less prosperous countries of the EU, Greece, Portugal, Spain and Ireland (Profiroiu, Popescu, 2004, p. 253-254).

Through its policy of regional development the EU means to achieve three main objectives: "Convergence" (meant to improve the conditions of economic growth and the factors which contribute to a real convergence for the member states and less developed countries, "Regional competitiveness and employment of labour force". It is meant to consolidate competitiveness and regional attractiveness, as well as the capacity of labor force employment, in a dual approach) and "European territorial cooperation" (meant to strengthen the cross-border cooperation due to some local and regional initiatives achieved in common, to consolidate the cross border cooperation through actions meant to promote integrated territorial development and to stimulate interregional cooperation and of experience sharing. Regional policy expresses also the solidarity of the EU with less

developed countries and regions, concentrating the funds in the domains and sectors in which they may have an important impact.³⁸

The enlargement process from 2004 and 2007 was possible due to the adoption of the membership criteria by the member states. It is a well known fact that besides the three criteria that were adopted in Copenhagen in 1993 (the political, economic one and the *acquis comunitaire*), in 1995 in Madrid the strengthened administrative capacity criterion was added. The regular evaluation and monitoring of progress analysis for the countries from Central Eastern Europe highlights the developments that took place at the level of administration and public management system (Iancu, 2010, p. 126-127).

Since the available space is limited within this paper, we will try only to look at the evolution of public administration through *local autonomy and decentralization*³⁹. These manifestations will be highlighted throughout the two following chapters. Firstly, we will emphasize **the regionalization and decentralization** in Romania regarding their accession moment 2007. Secondly, we will discuss about the process of **the unaccomplished decentralization or formal decentralization**. Among the identified manifestations we will mention only 3 that will be followed throughout the paper: the existing elected regional and local public authorities and their collectivities; the legal recognition of rights and obligations of regional and local administrative authorities that are necessary in order to manage the interests of the represented collectivities; the existing transfer of powers, responsibilities and resources from central to local and regional administrative authorities (Iancu, 2010, p. 127).

Regionalization and decentralization in Romania (Horga, 2014, vol. VI)

Regional policy design is the result of a process of multi-level decision-making between supra-national, national and sub-national actors. The implementation of this policy in Central and Eastern Europe varies greatly (Palermo, Parolari, 2013). Some countries, like Poland and the Czech Republic, decentralized power, creating strong and independent regional governments. Others, like Romania, Hungary or Bulgaria, only delegated administrative responsibilities to regional offices, failing to devolve power and create regional governments. The cause of this variation lies in the actors' diffuse role in decision-making on regional policy (Unita, 2011, p. 66). To understand the meaning of regionalization within the new Member States, we should take into account the a number of economic and structural factors, explicitly, changes in productive systems, accelerated market integration on sector bases, as well as the increasing competition between different economic areas after the abolition of most barriers regarding the circulation of goods and capitals. (Tatur, 2004, p. 15).

³⁸ http://ec.europa.eu/regional_policy/what/index_ro.cf

³⁹ The other principles - subsidiarity, openness and transparency, partnership and cooperation, non-discrimination, proportionality, accountability, efficiency and effectiveness, rule of law will be retained only for those elements that relate to the topic that we have proposed.

The principle of local autonomy and decentralization, generally sketched with direct reference to regional policy, multilevel governance and efficient allocation of structural funds (Loughlin, Hendriks, Lidstrom, 2011), is considered to be an appropriate presence regarding the reforms from EU Member States and candidate countries⁴⁰.

The beginning of leaving aside the centralized administration model, inherited from the communist period, was done differently from country to country in Central and Eastern Europe (Kruglasov, 2013, p. 8-34), as aforementioned. The tendency toward maintaining some degree of centralism or even toward, certain recentralization can be observed in the region throughout a period of 25 years of transition. If we analyze each country, we can notice that decentralization addressed by national governments in Central and Eastern Europe, at least at the level of discourse, after the events from 1989-1990, the introducing of *local autonomy and decentralization* was done after signing the Association Agreements with the EU and amid financial assistance from the EU. This topic of the Europeanization impact on the introduction of local autonomy and decentralization in Central and Eastern Europe is seen by scholars as top-down (Keating, Hughes, 2003) action which translates to some as an external pressure (Bouckaert, 2009, p. 96) or for other as part of the imposed conditionalities (Keating, Hughes, 2003, p. 69-88)⁴¹.

Out of the large number of countries in the 2004 accession wave, with a strong assistance from PHARE, Romania adopted the necessary legislation only in 1998. Romania never had regions and never considered it needed them, regionalization was a great challenge. It was felt that the pressure to adopt the *acquis comunitaire* implied regionalization following the NUTS classification (Keating, Hughes, 2003, p. 75)⁴². This implicit pressure was mainly felt through the comments of the Country Regular Reports. These reports can moreover be considered guiding documents to what results are expected from the regionalization process. The repeated criticism of the administration's insufficient capacity in implementing regional policy can be understood as insufficient decentralization or weak regional administrative capacity.

Regarding Romania, the Commission Report from 2003, taking into consideration the decentralized process, that there is a considerable lack of transparency in the financial

⁴⁰ The European Parliament resolution on Agenda 2000 and Council Regulation no. 1659/98 on decentralized cooperation, as last amended by Council Regulation no. 625/2004/189, as amended and supplemented.

⁴¹ Michael Keating, James Hughes, *op.cit.* These conditionalities were rather unclear due to the lack of a regionalization model that the EU would promote (See. Hughes, James, Sasse, Gwendolyn, Gordon, Claire E., *Europeanization and regionalization in the EU's enlargement to Central and Eastern Europe: the myth of conditionality*. Palgrave, Basingstoke, 2004, p. 69-88

⁴² Idem, „EU enlargement, Europeanisation and the dynamics of regionalization in the CEECs” in Michael Keating, James Hughes (eds.), *The Regional Challenge in Central and Eastern Europe: Territorial Restructuring and European Integration. Regionalism & federalism*, vol.1. Peter Lang, Brussels, 2003, p. 75

transfer to the local county level, believes there is a threat to the very existence of local autonomy (European Commission, 2003, p. 17). The same document highlighted the current legal framework that was unclear, Romania lacking a strategy for managing the process of decentralization in a transparent and stable way (European Commission, 2003, p. 17).

In 2004, the Commission reiterated Romania's still unsolved problem of responsibilities' transfer to the local level showing that they were not followed by doubling adequate financial transfers. However, the Commission considers that "*the Romanian authorities have made considerable effort to develop a strategy to manage the process of decentralization in a transparent and stable manner*" (European Commission, 2004, p. 18). Decentralization and the need to clarify the allocation of responsibilities and the financial resources to the various levels of government remain points of interest and in 2005 the Commission emphasized that "*the transfer of powers to local authorities is far from completion*" and local financial autonomy "*is still limited*" (European Commission, 2005, p. 8, 25).

In 2006, the Report of the European institution limited itself to mention exclusively the state that regulatory efforts that had been made towards the decentralization without doing the usual references to consolidation (Iancu, 2010, p. 144). "*Progress has been made in the area of public administration reform. [...] Local Public Finance Law completes the legal framework of decentralization. Continue efforts to ensure the transfer of powers from the central level to the local one. Time schedules are developed and there are identified procedures that are necessary for the decentralization and resource management responsibilities, including financial ones*"(European Commission, 2006, p. 39).

Analysing these examples we can notice that the impulse for procedural regionalization and decentralization reached all countries from Central and Eastern Europe, at least in procedural terms. Firstly, there were created intermediate levels between central government and administrative structures. But even here there are many issues to be arisen given the fact that the map of the regions is not correlated with the upper structures of the sub-national levels of government. Romania had 8 NUTS II regions and 42 (41+ Bucharest) regions at the upper level of the sub-national government.

Speaking from the perspective of *functional regionalization and decentralization*, the European Commission reports show that until the accession moment, no state revealed a normal functioning of the regional structures. However, there are notable differences. For instance, if Poland at the time of accession and in the next two years until the entry into financial cycle from 2007 to 2013, we can say that reached an optimal level of functional regionalization and decentralization, in the case of Romania, we registered "undeveloped regionalization and different decentralization" (Boullineau, Suciu, 2008, p. 357). We cannot say that the Romania has reached a functional regionalization as stated by Boullineau & Suciu, but we agree that it is a result of a technocratic reflection that is

necessary in order to facilitate the management of the European funds (Boullineau, Suciu, 2008, p. 357).

The unaccomplished decentralisation or formal decentralisation

Going through the previous chapter, we can say that the process of Europeanization of the new EU member states from Central and Eastern Europe, in general, and Romania particularly, seen through the regionalization and decentralization process, was a linear and solid trend. But, there were many elements which suggested that this process if not stopped, would regress.

It has been observed that despite their intentions, the EU policies have not yet led to significant decentralization or the empowerment of regional actors in countries with highly centralised political systems (Marek, Baun, 2002, p. 914).

It is accurate to say that the current territorial map of the majority of Central and Eastern European countries is the result of a compromise not easily reached after intensive and passionate political debates involving conflicting interests and a variety of pressures, the European Commission being just one of them (Kerlin, 2001, p. 14-18). The new territorial organisation came into effect bringing about an unprecedented modernization of the Central and Eastern European countries in terms of institutional and administrative systems. In Romania the establishment of the eight regions assumes also the development of new institutions. In terms of effectiveness, their functions are being questioned taking into consideration the loose connections with the local level, fact that affects the ability of local and central authorities to represent the needs and the interests of their citizens (Horga, 2011, p. 281-301). According to Boullineau & Suciu "*the regionalization is a formal process created for regions without power or territory*" (Boullineau, Suciu, 2008, p. 357). "They were created as cooperation forms with the sub-national territorial administrative forms: county in Romania (*judet*). They are led by the Regional Development Council which does not have a legal personality and that is responsible for the distribution of European funds among the counties, after they were distributed at the central level (Boullineau, Suciu, 2008, p. 357). We should add that neither the current Romanian administrative structure, composed of 42 counties, which is seen as a sufficient form suitable for the European regional policy framework or for managing the structural funds after joining, is not functional, being too diffused (Suciu, 2013, p. 103-146). Additionally we can legitimately raise the question of the inability to influence the national strategies regarding the regions as it was demonstrated during 2000-2006 and 2007-2013 (Horga, Ghimiş, 2014).

The most recent report regarding Romania in what concerns the local and regional democracy dates from March 2011. The study report highlights the positive dynamics in Romania's development, but still draws attention towards the reforms that are needed due to the fact that there are no consultation mechanisms for the local authorities in subjects of their concern like financial and social aspects (Răducanu, 2013, p. 48).

In 2013 in Romania there could be noticed a pro-regionalization movement, as well as for decentralisation and preparation for the transformation of eight statistical regions into regional authorities that have their own rights. These new regions would benefit from a large-scale transfer of competences from the central state, from the counties (județ) and from the municipalities. The exact details surrounding these new competences are not yet officially determined, but they will require revisions of the framework agreement on decentralisation and of the law on public administration. These regions are meant to enjoy a great deal of financial autonomy. The financing plan for local and regional authorities and the tax code should be modified accordingly, in a way that will also help the development of local self-government. The existence of these new regional entities may also trigger the restructuring of services and changes in the number of civil servants. It is also worth noting that the presidents of these new regions are proposed to be elected by direct vote (The Council (CEMR), 2014). Unfortunately this process is greatly underdeveloped, apart from a little progress realized by the agglomeration of some decentralized institutions (health, finance, construction inspection, inspection of the forest), in the 8 centres of NUTS II nothing was achieved. There is rather the perception that these agglomerations are nothing more than some recentralization masked result of the financial crisis. But looking from another perspective, in the case of Romania, and other countries from the region, the after-crisis effects can constitute the engine for the creation of functional regions, because the major plans to reduce costs and improve public administration efficiency may, however, affect the traditional (județele) organisation of local and regional authorities in Romania in favour of regions.

To bring forward an argument in support to this assumption we can refer to the task of setting territorial boundaries for the new sub-national governmental institutions. As previously observed, one of the prime requirements of the *acquis* is the establishment of regional units with dimensions matching the NUTS II classification and capacities to manage EU funds. At least four divergent positions supported by different cultural and political beliefs struggled to obtain a legal acknowledgment of their own standpoint on the country's internal boundaries. The result of the compromise was a solution in compliance with the NUTS II classification by a marked mismatch between the administrative boundaries and the country's socio-economic regional profile, a solution which is much more likely to complicate rather than facilitate the reduction of internal disparities (Rokita, 2002).

In case of Romania the boundaries of these regions have been established. The 8 units NUTS II which were created in Romania have in few cases (except the South-West and partially the North-East regions) a functional socio-economic regional profile (Horga, 2011, p. 287-288). The two examples of Poland and Romania are, in our opinion, the two large regionalism models from Central and Eastern Europe. In the Case of Poland we can discuss about a system of regional decentralisation (Marcou, 2001, p. 22), whereas in the

case of Romania we can notice a model of regionalized unitarism (Sherperreel, 2007, p. 41).

The new regional authorities were given a wide range of competences and responsibilities for conducting regional development policies. When drawing up the reform, the central governments have secured certain strategic dispositions allowing them to preserve a significant degree of control over regions. If the regional institutions have theoretically responsibilities in the field of programming regional economic development, their activities are subordinated to the control of a government-appointed entity. For instance, the *Wojewoda* which represents the central government in Poland or *Prefectul* in the case of Romania⁴³ are designed to safeguard state's interests not only by controlling the legality of the decisions that are taken by the elected regional authorities, but also by making certain that they are in line with the priorities defined at the national level. Moreover, what is even more important to note, being the representatives of the state treasury they also perform a financial control at the sub national level.

The decentralization of competences has not been followed with an adequate degree of financial decentralisation. The regions still remain to a large extent financially dependent on the central government, and this fact poses severe restrictions to regional authorities when elaborating their own strategies of local development, hence it contradicts their statutory functions. The dominant position of the centre over the regions in terms of finance undermines the validity of the regional contract as a symbol of a new, regionalised approach to regional policy-making.

Concluding, the regionalization and decentralization process in Romania has led towards two major evolutions. Firstly, within all countries we can notice a centralization of procedures; the lack of coordination between different levels, as a consequence of an unclear division of competences does represent a serious problem. Secondly, there are severe constraints that block the efficient implementation of the EU's co-financed programmes which, as widely known, require the complementary participation of authorities from all administrative levels.

If during the 2000-2006 financial cycle, these developments have affected more than the relationship between Romania and Brussels due to the low volume of funds to which they had access, during 2006-2013 financial cycle, in which the Romania had access to over 85% of cohesion funding, contradictory developments in decentralization and local and regional autonomy determine the relationship between Romania and Brussels.

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