

Selected topics in modern society

Patricia Kaplanova (ed.)



FOS

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Novo mesto, 2016

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Publisher: Faculty of Organization Studies in Novo mesto, 2016

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Publication is available at www.fos.unm.si in .pdf format.

CIP - Kataložni zapis o publikaciji
Narodna in univerzitetna knjižnica, Ljubljana

308(4)(0.034.2)

SELECTED topics in modern society [Elektronski vir] / Patricia Kaplánová (ed.). - El. knjiga. - Novo mesto : Faculty of Organization Studies, 2016

Način dostopa (URL): <http://www.fos.unm.si>

ISBN 978-961-6974-11-0 (pdf)

1. Kaplánová, Patricia
284458240

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The complexity view on the changes in social and economic environment in 21 century

Vasja Roblek¹ & Zlatka Meško Štok² & Maja Meško³

Abstract

The paper tries to clarify the economic and political situation in the first half of the 21 century and their need to foster the socially conscious business environment. The society is faced with a dilemma of how to provide social and economic development and to reduce environmental damage, caused by the constant human desire for economic growth. It will be necessary to realize that capitalism is faced with the question of how to proceed at low or even zero growth? In a zero or even negative growth pushed the economic system as we have seen the cost of future high oil prices, limited resilience of global ecosystems, utilization of cultivated land scarcity and pollution of water resources and social pressures in order to avoid anthropogenic climate change. The capitalist system is thus faced with the transition to kind of regulated steady-state capitalism. Tendencies of the decrease of profit rate in competitive markets are likely to lead to the transformation of the final phase of capitalism in the post-capitalist society, which will be based on the sustainable consumption governance and non-profit business. Companies have to constitute a fundamental challenge for responsible development that will base on innovative approaches, whatever the branch of activity.

Keywords: information technology, industry 4.0, globalization, sharing economy

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Introduction

Globalization processes have led to the internationalization of competition, increase innovation dynamics and uncertainty in the grocery stores. Every firm is now global and the most innovative firms incorporated global network in its DNA. Firms are exposed to disturbances or alterations in the external environment in which the potential risks arising due to various geopolitical, environmental, economic and competitive changes (Dominici, & Roblek, 2016, pp. 223 - 224; Kaplan, & Mikes, 2012, p. 51). The question is how to enable a more balanced development and a more equitable distribution of income in the world, where all, the capital is concentrated in 1% of the population, where the neoliberal policy has long been destroyed and it appropriates natural resources for the purpose of high profits and lead to a restriction of human rights and the payment of low wages, where because of the political consequences come to humanitarian crises. In today's knowledge society, it is urgent to determine out the solutions for structural reforms. Exponential increase of using up and GDP based on fossil fuels due to a deficiency of minerals in the future will no longer be possible. The structural reforms include promotions of the long-term planning to assure continuity in policy through political changes. In the awareness of mankind must suffer the fact that on the Earth is not any more so much stock of natural resources and fossil fuels which still today show the foundation of economic development. Local and state authorities together with the communities have ensured the creation of green jobs. The new energy plan must base on renewable energy sources what will be regarded on the decrease of natural corrosion.. Creation of new jobs in clean and innovative technologies (low carbon economy) will affect both the sustainability (improving the quality of human life) and the reduction of

unemployment (Dominici, Roblek, & Lombardi, 2016, pp. 36 – 37).

The Western world, along with Eastern superpowers are faced with the fact that it must ensure social and economic development in developing countries than developed countries, which are experiencing low economic growth and relatively high unemployment. Answer the oyster in the concept of new entrepreneurial mindset, in which the state, the market and NGOs together shape the corporate politics. In behaving so, we have sight of the fact that the multinationals do not represent strategic advantages of rural areas. As an example of this was witnessed in Germany, where its competitive advantage does not represent multinationals such as BASF, BMW, Daimler and Siemens, but minor and medium enterprises so-called Mittelstand (Bertoncelj et al., 2016, pp. 64 - 65). These are companies which are mostly still in the family growth, its core concept is based on innovation and focus on the specific product. These companies are mindful of the accomplishments of their employees, because production is not outsourced and only on the ground of their own knowledge and unique business processes, and adaptation to the needs of customers increased added value and create new value (Welter et al., 2014, pp. 11 - 16).

The capitalist system cannot continue to be founded on mere profit and complexity theories will help us to realize the underlying challenges that are taking place in the social and economic environment, because more and more people are mindful that it is needed an economic scheme that it is failing to include responsible development that will based on innovative approaches, whatever the branch of natural process.

Challenges for the new socioeconomic development

Despite the progress, which is reflected in an increase in the educational level of the population from 1820 to 2000 and increased the purchasing power of wages, only a few countries reduce income inequality between rich and poor. In the case of China, Thailand, Germany and Egypt it is evident that despite the substantial economic development, income inequality in 2000 was almost the same as the year 1820th. In Brazil and Mexico income inequality is now even larger than at the time of Simon Bolivar. Only in a handful of rich countries - such as France and Japan - inequality is now lower than in the 1820th. (der Vleuten, & Kok, 2014, p. 38).

The world Gini coefficient was 49 in 1820, and increased to 66 in 2000. But this growth in inequality is the termination of major conflicts between rich and poor in individual countries (inequality in the ordinary sense of the word). It is evidently an inequality between rich and poor countries. This inequality is a pendulum 130 years until 1950, then it fell sharply in 1980 (a period of so-called egalitarian revolution), in the year 1980 has again risen to the ratio of the 1820th. This indicates that the increased global income inequality originates elsewhere, namely from so called inter-country inequality, the gap between rich and poor countries. This gap has since 1820 increased significantly. In 1820, a Gini coefficient of inequality had been in interstate just 16 (very low), and in 1950 it increased to 55, and then remained relatively stable (Kaplinski, 2005, p. 76; Moatsos et al., 2014, p. 204).

The main force which has created the interstate inequality since 1820 is the industrialization of the Western world. The industrialization caused in Western Europe, that the average income per person that was estimated as being about 90% of its value in Africa today. Life

expectancy in Western Europe and Japan in 1800 was about forty years, and in a period of economic growth in the nineteenth and twentieth century there was a more than six-fold increase in the population (Maddison, 2007, p. 42).

Rich countries have eased by globalization in the years 1914 to 1970 devoted to internal policy and thus reduce income inequality between rich and poor citizens. When the post-1980 globalization bloomed again, this decreased income inequality between rich and poor countries, but also led to greater income inequality within countries (Moatsos et al., 2014, p. 202).

The period after World War 2 is considered as the golden period of growth and prosperity middle class population. North America, Western Europe and Japan built a capitalist system with free markets and private property, but their economic policy based on Keynes government centered regulatory policy (Goldstone, 2002, p. 342). The communist states had a centrally planned economic system. It was encouraging that the growth of industrialization through the socialist governments were provided the social harmony and people offer prosperity (Giddens, 1994, pp. 69 – 71). The South American, Asian and African political regimes were in the period up to 90 years of 20 centuries prone to leading the development (Inglehart, & Welzel, 2009, p. 37).

The twentieth century brought before the economist's challenge of how to replace the jobs lost due to technological developments, this reply was addressed also by increasing the supply side (e.g. Reaganomic) and launched new products and services on the market (Goodwin et al., 2015, p. 88). The process of industrialization in the last century did not exclude people from the working process. Indeed, the spread of urbanization and industry outside Europe and North America led to the growth of the population on Earth (Landes, 2003,

pp. 487 – 491). The problem is that in order to ensure economic growth human has in the last centuries increased exploitation of natural resources.

The rise of computer technologies in the beginning of 80 of the last century led to the transformation of "traditional heavy industry" into the technological development-oriented economy (Roblek et al., 2013, p. 555).

The core processes of modernity, economic globalization and urbanization. Europe, the US and Canada were at 80 years of the last century faced with the loss of jobs due to closure of industry and relocation of production in Asian emerging economies (Ley, & Murphy, 2001, p. 121; Hall, & Barret, 2012, pp. 74 – 76).

The late eighties were the time when the communist system falls down and in early nineties came in ex-communist states to the privatization and liberalization of the market (Rupnik, 2014, pp. 7 – 8). This time is also connected with the rise of globalization that influenced by Asian, African and South American development countries that open the borders to international financial and goods markets (Ley, & Murphy, 2001, p. 119). The World Bank and International monetary fund playing the mayor role in the implementation of global liberal economic policy and integration of world regulated market that rules are administrated by the institutions like World trade organization.

In the of the 21 Century developed the innovative economic theory which, contrary to neoclassical is arising from the thesis that capital accumulation is the main vehicle for economic growth in knowledge-based economy of the 21st century (Dominici, Roblek, & Lombardi, 2016, p. 34).

Sustainability and circular economy

The concept of societal well-being consists of economic, social and environmental factors. The context of research focuses on the social factors of consumption and economic well-being (aggregate level). These factors are liability, environmental quality, quality of life and sustainability (Dominici, Roblek, & Lombardi, 2016, p. 39).

The connection between the concept of consumption and that of sustainable development can be traced in the report of the Brundtland Commission (WCED, 1987).

The Commission defined sustainable development as a form of (WCED, 1987): “development that meets the needs of the present without compromising the ability of future generations to meet their own needs.” This definition is based on two concepts that explain the connection between sustainable development, the growth of a country's welfare, and, consequently the human consumption:

1. The concept of “needs”: in particular, the essential needs of the world's poor, to which overriding priority should be given;
2. The idea of limitations imposed by the state of technology and social organization on the environment's ability to meet present and future needs (WCED, 1987). The financial crisis in 2008 to 2010 is an indicator how short- term profitability mindsets and related strategies, policies and actions of individuals and individual organizations can cause global economic, ecological and ethical crises. These events have contributed to the judgement that most organizations operate on business models that are not sustainable (Boons et al., 2013). In a zero or even negative growth pushed the economic system as we have seen the cost of future high oil prices, limited resilience of global ecosystems, utilization of cultivated land scarcity and pollution of water resources and social pressures in order to avoid anthropogenic climate change (Segal, & Cloete, 2012: 26). In

the case of a Sierra Leone country, where was in 2014 came with the outbreak of the Ebola, it can be seen how devastating could be epidemics for the country's economy (e.g. AIDS/HIV) (EIU, 2015).

How important factor is in a world economy still the oil can be seen from the fact that the largest economy in Africa to import 80 percent of all the oil. High oil prices extremely negative impact on their economic growth (India). On the other side Nigeria is an important exporter of oil and lower prices caused that the value of the domestic currency at the end of 2014 and beginning of 2015 reached the lowest value was, inflation this year will reach double-digit figures. Foreign exchange reserves are only at the December 2014 decreased by as much as eight billion dollars, or nearly one-fifth (World finance, 2015). The states members of OPEC, Iran, Venezuela and Russia, which established their economy on exports of commodities and consequently ensure the social peace, especially with the high prices of oil, are faced with the recession and currency devaluation. The Russian economy is in cries also because of the Western political sanctions (EIU, 2015).

In the year 2016 the economic concept that believed in unlimited economic growth of emerging markets of Brazil, Russia, India and China is known as BRICS is crashing because Brazil and Russia are in deep recession. These two commodities – centric countries will be replaced with tech – heavy Taiwan and (South) Korea. The BRICS is changed with the TICKS. The technology is changing the nature of the emerging markets, where speed with which young consumers are adapting to technological change, in areas such as commerce and online shopping, is much faster than in the US (Johnson, 2016).

One of the key challenges to the concept of prosperity without growth is therefore the development of a new macro-economics of sustainable development (Dominici, Roblek, & Lombardi, 2016, p. 40).

Daly (2009, p. 43) emphasized the key role of environmental conditions in terms of unchanged stock of natural capital and the maintenance of low levels of material and energy flows within the regeneration and the assimilation capacity of the ecosystem.

Macroeconomics for sustainability should not be considered as just a model for maintaining economic stability by increasing environmental pressures. Countries and companies adopted linear growth models that are based on using up resources. Countries rely on consumption to grow their GDP, while many firms depend on cost-cutting and end-users buying new replacements to sustain profitability. For example, it has been estimated that in Europe, 90% of the raw materials used in manufacturing become waste before the product leaves the factory while 80% of products made get throw away within the first six months of their lives (Perella, 2014). The required paradigm shift implies to dismiss the assumption of growth of material consumption. This led to the creation of the circular economy concept that has been gaining a great attention in both business and political discussions. The circular model requires firms to come up with disruptive technology and business models that are based on longevity, renewability, reuse, repair, upgrade, refurbishment, servitization, capacity sharing and dematerialization. This means that they have to step away from just cost-cutting, but instead start focusing on rethinking products and services as well as customer propositions (Esposito, Tse, & Soufani, 2015).

Development paths in post – industrial society

In the second decade of the 21th century, we find ourselves faced with the fact that the fourth industrial revolution, which brings a new technological development which includes high robotics increasingly impact not only on the job migration as caused by globalization, but

the increasing loss of jobs. Frey and Osborne (2013) argued that jobs are at high risk of being automated in 47% of the occupational categories into which work is customarily sorted. That includes accountancy, legal work, technical writing and a lot of other white collar occupations. Substitution of Labor with automated production present benefits to owners of capital. This is resulting from 1980 to today in that owners of capital have captured ever more of the world's income while the share going to employees has fallen (The Economist 2015).

The internet has, since the beginning of the nineties of the 20th century, is having a significant impact on changes in the economic, business, social and political environments, including contributing to the development of the electronic business environment. By the time of the financial crisis of 2007–2008 the digital economy had already emerged. The digitization that includes the internet and mobile technologies with its high-speed connectivity helped bring about the change of established business models (Roblek et al., 2013, p. 563; Zoroja, 2015). Manufacturers of the information technology products/services and manufacturers of traditional products have found themselves before the issue of how to stimulate re-growth of demand. The answer was found in the development of a new technological period, which is characterized by the fact that the economic and social activities are globally interconnected, which facilitates technology platforms such as the internet, mobility and sensory systems (Bauer, Patel & Veira, 2014). This has led to the 'complexity cross' – community interactions, digital media, hardware, sensors, clouds and microprocessors (Porter & Heppelmann, 2014, p. 67). In a simple way, we can talk about the Internet of things (IoT) if any device or even a living being is connected to the internet.

The rise of Industry 4.0.

The development of IoT considered by some a new industrial revolution was named by Germany "Industry 4.0" (Dais, 2014, p. 625). One characteristic of Industry 4.0 is increased competitiveness through smart equipment, making use of information about high-wage locations, demographic changes, resources and energetic efficiency and urban production. The consequences will be felt at a loss of jobs and the creation of new ones, which today are not yet known (Hecks, & Rogers, 2014, p. 36).

Just as the internet has transformed the digital industry, Industry 4.0 will completely transform the industry. The four key components of Industry 4.0 are Cyber Physical Systems (connection between the real and virtual world), the Internet of things, the Internet of services (IoS), and the smart factory. Machine communications (M2M) and smart products are not considered as independent parts. The M2M is an enabler of the Internet of things. Smart products are a subcomponent of the Cyber Physical Systems (Greengard, 2015, p. 42; Kagermann, 2014, p. 607).

Because each object can potentially be connected and networked, it will be necessary that within enterprises ways of thinking change and different business models designed on the internet and connectivity be created (Pejić-Bach, 2014, p. 352). In this mode, the "smartness economy" will change the way of creating added value. The sources of production may change, but additional services will be accessible via the internet. This can already be seen in smart mobility, automobile leasing and various examples within the industrial, internet, mechanics and heavy industry, in cases of smart homes, which for example may include along with a TV, a fridge and a game console equipped with an IP number and connected to the Internet of Things (Martin, 2015, p. 26).

These days the internet relates to a billion people through personal

computers, tablets and smart phones. 75% of communication devices are now connected to the internet, directly or indirectly. By 2020 the internet will be connected to over 50% of devices, machines and "things" that are not "standard" communication devices, such as we are accustomed to: the above-mentioned computers, tablets and phones (Gartner, 2014). They will be linked through small devices that can be simple or complex sensors, micro-computers, which will have the possibility of autonomous operation without the need for additional power supply even for several years or decades, and, more importantly, the device will connect (mostly through wireless) to the internet (Lee, & Lee, 2015, p. 432).

The smart, connected product breakthrough is evident in all manufacturing branches. Companies that were not engaged in the manufacture of products in the field of development of the IoT are now entering this market (Wilkinson, & Thomas, 2015, p. 276). Apple developed a smartphone application for managing the 'connected' home. Such applications allow control over the door locks from remote devices from any internet connected source, as well as such things as adjusting a thermostat, controlling the supply of food in the refrigerator, etc. (Baunsgaard, & Clegg, 2015, p. 7).

One of the most important roles of the IoT is to change the environment and develop new strategic choices. The IoT is a new expression of the relationship between customers and producers. The relationship will include the manufacturer of the finished product and multiple partners, who will ensure the development of built-in components and software. This cooperation is influencing the rebuilding of the knowledge value chain (Porter, & Heppelmann, 2014, p. 84).

On the demand side, customers will increase their awareness in regard to the importance of the quality and reliability of the acquired

and given information and technical condition of the products. This will affect the accumulation and analysis of information in real time and consequently influence coming guidelines of value creation for the customers. It establishes the question of how the customers will adapt to the new technologies connected to the products.

Sharing economy

Technological development and the financial crisis in 2008-2009 led to changes in relation to ownership and transformation of the co-owner model to the co-sharing model. If people are accustomed of the co-ownership model they now have to get used to sharing their cars, bikes, flats, washing machines, etc. (Lietaert, 2010, p. 578).

Sharing between people is process old as humankind, but the reason for the rise of a sharing model has been detected in the decrease of income in the middle class in the Western countries (Hacker, & Pierson, 2011, p. 141). This results in lower consumption. People have started to realize the costs caused by the ownership and sub-optimal utilization of cars, real estate and other goods. Innovative companies have started to promote services based on a sharing economy, creating a shift in the culture of possession of goods. The first applications of sharing economics have been in regard to durable goods such as cars and apartments (rentals) (Dominici, Roblek, & Lombardi, 2016, p. 37).

The development of the information and communication technologies (ICT) in the second decade of the 21st century has enabled the creation of strong, mutually cooperating web communities, which are peers sharing digital products and information (Hamari, Ukkonen, & Sjöklint, 2015).

A sharing economy becomes an economic activity based on person to person (P2P) and business to person (B2P) communications. Online

platforms become an important part of a sharing economy that enables people to participate in collaborative consumption. In tourism and hospitality, a sharing economy is recognized as a form of: (i) knowledge sharing, which includes ideas, experiences, information about guests, HRM information, specialized knowledge, such as information about the investors, etc.; (ii) sharing of the opinions and views of users about the quality of experiences about tourists and hospitality services; (iii) sharing of objects and areas that are intended for tourist activities (Gretzel et al., 2007, p. 559).

Information technology is becoming an important factor in companies' business models. With platforms like Airbnb the information technologies compete with the hotel industry. Hotel managers have to be aware of the influence of IT, including social media platforms that create opportunities to improve the entire value chain of the hospitality industry. New technologies create value added in terms of financial benefits and intangible assets such as improved networking, communication and customer services (Roblek et al., 2013, pp. 563 - 564).

In the central European region, too, platforms such as Uber and Airbnb are growing. These are going digital platforms rely on revenue-generating activities and less on classical sharing. According to profit oriented platforms, it should be noted that co-owning as a sharing model in tourism and hospitality are not free for the user. The user is paying the owner proportionately with the time of using the object. The narrow parts of the platforms are non-profit, such as the couch surfers who are hosted free of charge in the homes of others (Schor and Fitzmaurice, 2015, p. 416).

Conclusion

The paper discusses economic and political situation in the first half of the 21 century. In mentioning period, it is necessary to establish how to provide social and economic development and to reduce environmental damage, caused by human being and their desire for economic growth. For this reason it is urgent to find out the solutions for structural reforms, i. e. include promotions of the long-term planning to ensure continuity in policy through political changes. In the consciousness of humanity must stand the fact that on the earth is not any more so much stock of natural resources and fossil fuels. Local and state authorities together with the communities have ensured the creation of green jobs. The new energy plan must base on renewable energy sources what will be affected on the reduction of natural erosion. Creation of new jobs in clean and innovative technologies (low carbon economy) will affect both the sustainability (improving the quality of human life) and the reduction of unemployment.

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Social dimensions of regional policy of the European Union

Patricia Kaplanova¹

Abstract

The effectiveness of the European Regional Policy is mostly perceived in many ways analysing the economic perception (Crescenzi & Giua, 2014), or the political-institutional perspective (Bachtler&Ferry,2015, Rodriguez-Pose & Garcilazo, 2015). This paper is aimed to consider a sociological perspective of the effectiveness of the European regional policy. Because of the main objective of the European cohesion policy is a welfare of the European citizens, this study is critically questioning the performance of the European Regional policy. As a methodological indicator, this paper examines the poverty risk index in comparison with the performance of the Regional Policy. With this respect, the provision of the Cohesion Policy is compared to the rate of poverty of citizens. Besides the goal achievements of previous Regional Policy (2007-2013), the „real“ benefits of the Cohesion Policy show the unpleasant results. The outcomes of this paper do not even contribute to an efficiency of the core European policy from the social-political perspective, but also contribute to an overall discussion about the European legitimacy.

Keywords: European Regional Policy, Cohesion Policy, budget, risk of poverty

Introduction

The structural funds of the European Union regardless of the European cohesion policy perform the basic Instruments of the European regional policy. For the political scientists such as Majone

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(1994, p. 77), the European Union main attribution is a regulation and the research of the European Union should be perceived through a policy management approach. Therefore, the current budget of the European Union for unitarian policies is more than 454 billion of euros² for the time period 2014-2020 and the share for cohesion policy perform 351,8 billion of euros³. Redistribution of that amount of financial sources triggers even a question how much influential are political and national interests in the decision-making of distribution to the European regions. The question of Europeanization of regional activism has become more than apparent in last years. Nevertheless, the new political principles as the Open Method of Coordination (OMC) determined by the regional and social policy reflect an important step in the regulatory policy of the EU. The OMC from an institutional perspective embodies an open discussion of the representatives of European, national and regional governance and could be seen as a deliberative model of democracy (de la Porte&Nanz, 2004, p. 267). The deliberation in the OMC is mostly perceived by the employment policy of the EU, to which the structural funds contribute the most. The support of the European Union to share more finances to structural funds for social politics expresses the European interest in a welfare politics (Heidenreich&Zeitlin, 2009, Jeffery, 2015). Therefore, the regional and cohesion policies, understood side by side, are also aimed to strengthen the European solidarity. The context and the output of regional policy triggers also a part of a social identity question. Because the structural and cohesion funds are aimed at improving a standard of living of the European citizens, the perception of

² European Structural and Investments Funds data. Overview available at <https://cohesiondata.ec.europa.eu/overview>

³ http://ec.europa.eu/regional_policy/en/policy/what/investment-policy/

political interests should be based on the citizen's good. This paper examines the structural and cohesion funds in the context of regional policy with the sociological dimension of poverty risk and social exclusion. The main hypothesis of this paper is that even there is a significant share of the EU budget for social and economic development of regions, the effectiveness towards the European citizen's benefit could not be verified.

The social dimension of regional policy in the context of development of the European integration

The European integration from the neo-functional perspective describes a driver of the integration as a „spillover“ mechanism when „one economic sector would create pressures for further economic integration within and beyond that sector.“ (Rosamond, 2000, p. 60). For the purpose of a negative impact of the socio-economic development of regions in Europe, the EU has established structural funds and cohesion policy to balance the economic inequalities of the European regions. The first amendment of regional policy was mentioned in the preamble of the Treaty of Rome (1957) which promoted a principle to „strengthen the unity of their economies and to ensure their harmonious development by reducing the differences existing between the various regions and the backwardness of the less favoured regions.“⁴ With this respect, there were established the first two structural funds, the European Social Fund (ESF) and the European Agricultural Guidance and Guarantees Fund (EAGGF) with the goal to help to implement the common policies. Nevertheless, in 1970, the expenses for structural policies performed just 3% of the European budget (Baldwin&Wyplosz, 2008, p. 263). Even the Treaty

⁴ Treaty of Rome (1957) available at:

http://ec.europa.eu/archives/emu_history/documents/treaties/rometreaty2.pdf

of Rome suggested the harmonisation of socio-economic development of regions, the European Regional Development Fund was established after the accession of countries in British Islands (Great Britain, Ireland) in late 1975. The integration of the first „poor“ country, Ireland, had changed the perception of regional policy towards redistribution more finances to regions in need. Consequently, in 1980, the financial contribution for regional policy increased for 11% of the overall European budget (Baldwin&Wyplosz, 2008, p. 263) as a result of the long-term negotiations over the Commission's submission of Guidelines on Community Regional Policy (Manzella&Mendez, 2009, p. 11). Lately, with the accession of less developed countries, such as Greece (1981), Portugal, and Spain (1986), the priorities of expenses for regional policy needed to be reorganised. The key principles of regional policy were focused on the poorest and most backward regions, the multi-annual programming, the strategic orientation of investments, and the involvement of regional and local partners⁵.

The significant progress of the institutionalization of regional policy became in 1986, with the implementation of the Single European Act (SEA). The SEA triggered the unification of Structural funds into the common policy of Social and Economic Cohesion (Cini, 2007, p. 292). The cohesion policy at that time directed the three funds, the European Regional Development Fund, the European Social Fund and the directorate of European Agricultural Guidance and Guarantees Fund. In 1988 was approved the first financial package of the Delors Commission as a policy of solidarity with backward regions (Bachtler&Turok, 2013, p. 16) which doubled the expenses for structural funds from 5% (1975) to 40% (1999). The Jacques Delors

⁵ http://ec.europa.eu/regional_policy/en/policy/what/history/

Commission continued to implement the policy of solidarity also for the convergence criteria for the accession to the European Monetary Union. Since 1992 (Maastricht Treaty) the Cohesion Fund has been functioning on behalf of the development and structural adaptation the less developing regions, a fight with the long-term unemployment, development of countrysides (Cini, 2007, p. 297-298). According to Baldwin and Wyplosz (2008, p. 264), the Cohesion Fund in 1992 was a result of the lobby of „poor four“ to ensure more finances for regions of Spain, Greece, Ireland, and Portugal. Since 1995, a special objective was added to support the sparsely-populated regions of Finland and Sweden⁶. The Lisbon strategy after 2000 shifted also the priorities of cohesion policy towards the employment, growth, and innovation⁷. The largest wave of integration of new member states in 2004 played a significant role in the EU budgeting. Two additional funds were launched as a pre-accession development policy (PHARE, and SAPARD) for post-communist countries. Later in 2007 was created IPA, the Instrument of Pre-Accession Assistance which replaced the previous pre-accession funds and is still providing the financial assistance for the countries like Turkey, Albania, Montenegro, Serbia and the former Yugoslav Republic of Macedonia⁸.

In 2007, was launched new period of Cohesion Policy for years 2007-2013 with the share of 35,7% (308 billion euros) from budget to regional policy. The time period 2007 – 2013 demonstrated three complex priorities of regional policy. First one was the priority of a convergence to support a development and job creation in the least

⁶ http://ec.europa.eu/regional_policy/en/policy/what/history/

⁷ http://ec.europa.eu/regional_policy/en/policy/what/history/

⁸ http://ec.europa.eu/regional_policy/en/funding/ipa/

developed member states and regions.⁹ The second priority was a competitiveness and employment designed to help the richer member states deal with economic and social change, globalisation and the transition to the knowledge society. The last was a territorial co-operation priority to stimulate cross-border co-operation in order to find joint solutions to problems such as urban, rural and coastal development, the development of economic relations and the networking of SMEs¹⁰. Lisbon Treaty (2008) expanded the Social and Economic Cohesion for a new dimension, the territory¹¹. The agenda for a time period of 2007 – 2013 took to account „a politically legitimated spatial strategy“ (Faludi, 2007, p. 569), which introduced an intention for the European social model. The territorial cohesion thinking underpins an equity, competitiveness, sustainability and good governance (Faludi, 2007, p. 580). The shared values of cohesion policy and solidarity, the European regional policy develops the principles of social and economic development, employment strategy, research and innovation, known as the Agenda Europe 2020.

The performance of the European Structural and Investment policies after Lisbon

The Regional Policy performs today the current European plan within the strategy Europe 2020. As it was mentioned above, the core aim is the social-economic development of regions and their cohesion. The European 2020 strategy defines this development as smart,

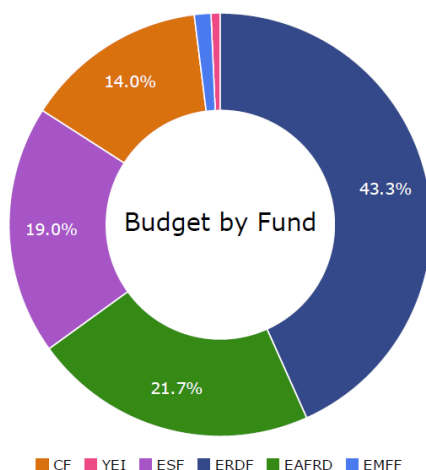
⁹ <http://www.euractiv.com/section/regional-policy/linksdossier/the-new-eu-cohesion-policy-2007-2013-archived/#ea-accordion-issues>

¹⁰ <http://www.euractiv.com/section/regional-policy/linksdossier/the-new-eu-cohesion-policy-2007-2013-archived/#ea-accordion-issues>

¹¹ http://www.europarl.europa.eu/atyourservice/en/displayFtu.html?ftuId=FTU_5.1.1.html

sustainable and inclusive growth in the European Union (Martens, 2010, p. 1, European Commission, 2010). For this purpose, the three main funds, the European Regional Development Fund (ERDF), the Cohesion Fund (CF), and the European Social Fund (ESF) perform 76,3 % of the cohesion budget for 2014-2020 (see Figure 1). With the European Agricultural Fund for Rural Development (EAFRD) and the European Maritime and Fisheries Fund (EMFF), the Youth Employment Initiative (YEI) they create the European Structural and Investment Funds¹² (see Figure 1).

Figure 1: The budget by Fund (%)



Source: European and Structural Funds. Available at <https://cohesiondata.ec.europa.eu/overview>

The European Commission as a facilitator of the European budget and redistribution of the expenses „can and does influence regional policy priorities“ (Hodson, 2012, p. 501). The target priorities for time period 2014-2020 include the Strengthening research, technological development and innovation, Enhancing access to, and use and

¹² http://ec.europa.eu/regional_policy/en/policy/what/investment-policy/

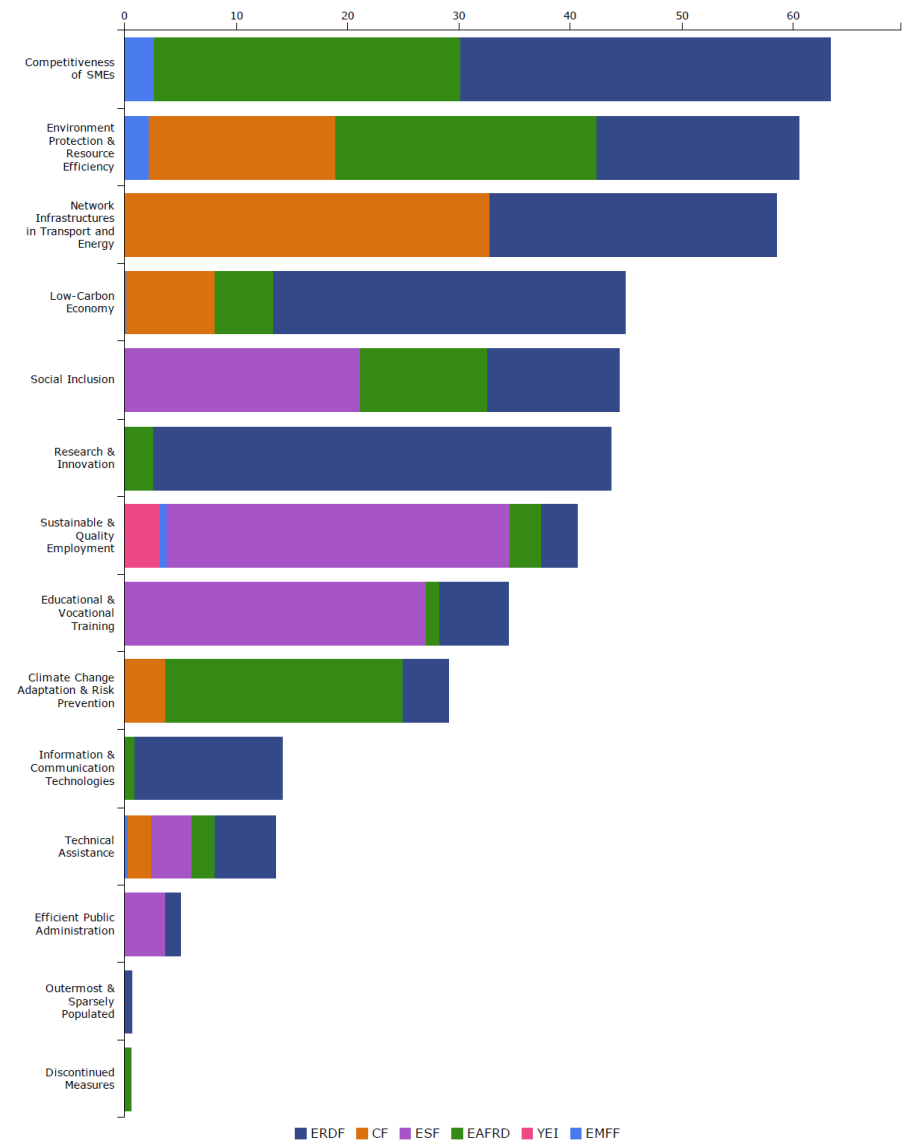
quality of, information and communication Technologies, Enhancing the competitiveness of SMEs, Supporting the shift towards a low-carbon economy, Promoting climate change adaptation, risk prevention and management, Preserving and protecting the environment and promoting resource efficiency, Promoting sustainable transport and improving network infrastructures, Promoting sustainable and quality employment and supporting labour mobility, Promoting social inclusion, combating poverty and any discrimination, Investing in education, training and lifelong learning, and the Improving the efficiency of public administration¹³. All priorities are supported by the European Regional and Development Fund, specifically the first four main strategies (research and innovation, low-carbon economy, competitiveness of SME, small and medium enterprises) (see Figure 2). The Cohesion Fund supports the network infrastructure and resource efficiency, low-carbon economy, and environment protection (Figure 2). The European Social Fund mostly contributes to priorities of sustainable and quality employment, education, vocational training, and social inclusion (Figure 2).

The politics of solidarity in the allocation of financial sources for regional policy is evident also in a diversity of region's development. As was mentioned above, the new policy of regulation of budget to regions examines also the territorial dimension. With this respect in Green Paper on Territorial Cohesion (2008)¹⁴ were launched principles of concentration, connection and cooperation with respect to a territorial diversity or demography.

¹³ http://ec.europa.eu/regional_policy/en/policy/how/priorities

¹⁴ http://ec.europa.eu/regional_policy/archive/consultation/terco/paper_terco_en.pdf

Figure 2. The budget by Theme (EUR billion)



Source: European and Structural Funds. Available at <https://cohesiondata.ec.europa.eu/overview>

According to Faludi (2013), the „territorialism“ is a subject of subsidiarity and „by enforcing the assumption that decisions by representative bodies as close as possible to citizens safeguard democratic legitimacy, subsidiarity is, therefore, a stumbling block in the pursuit of territorial cohesion.“ (Faludi, 2013, p. 1594) Nevertheless, the budgeting for cohesion policy is made by a categorization of regions according to socio-economic dimensions. Articles 174 to 178 of the Lisbon Treaty on the Functioning of the European Union (TFEU) divides the resources to three categories of regions, the less developed whose GDP per capita is below 75% of the EU average, the transition regions whose GDP per capita is between 75% and 90% of the EU average, and more developed regions whose GDP per capita is above 90% of the EU average.¹⁵ The share of cohesion budget 2014-2020 for less developed regions represents 51%, for transition regions 10,28% and for more developed 16,24% (see Table 1). Additional sources for regional policy contribute to other funds as the Cohesion Fund (18,14% of share from cohesion policy budget), European Maritime and Fisheries Fund, or Outermost or Northern Sparsely Populated Fund (Table 1). Lastly, almost 1% of cohesion policy budget flows to the Youth Employment policy.

Table 1. Total allocation of Cohesion policy 2014-2020 to regions

Allocation	EU_Amount (€)	EU_Amount (%)
Less developed	1,79349E+11	51,33
CF	63396513337	18,14
More developed	56733606078	16,24
Transition	35915445998	10,28

¹⁵http://www.europarl.europa.eu/atyourservice/en/displayFtu.html?ftuId=FTU_5.1.2.html

ETC	9239127587	2,64
YEI	3211215405	0,92
Outermost or Northern Sparsely Populated	1555422035	0,45

Source: Author's processing based on the EUROSTAT data

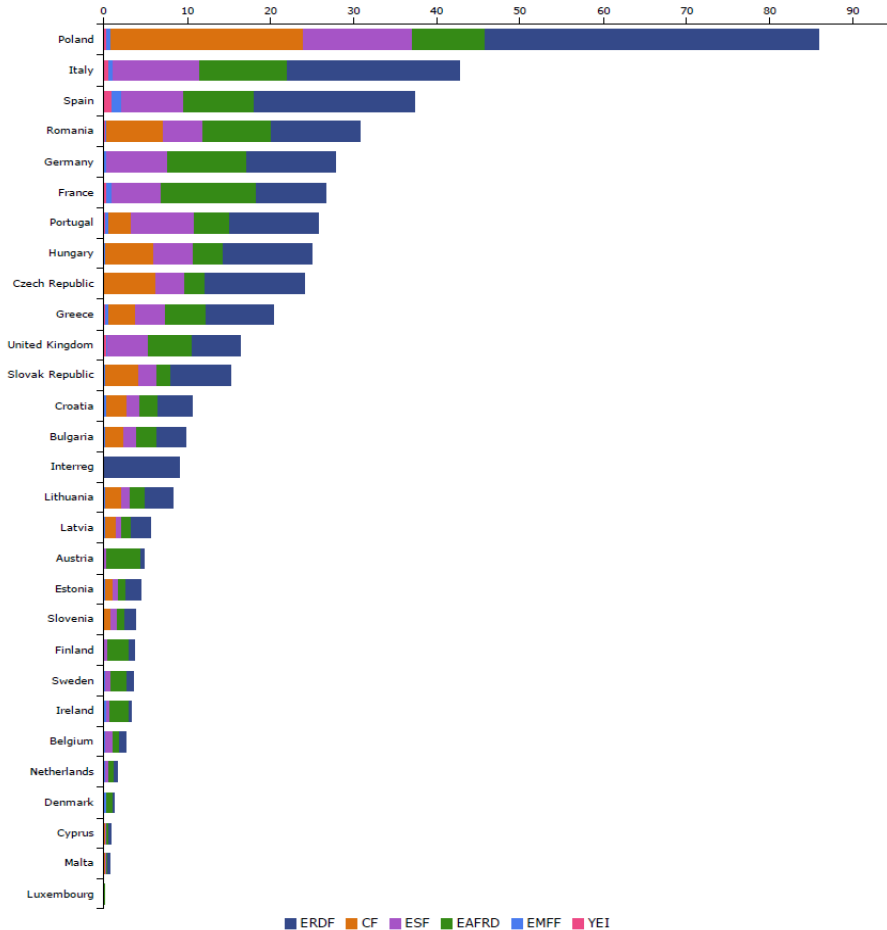
As we can see from the redistribution according to the recipient country, the three main funds are playing a significant role in the European Regional Policy (see Figure 3). The visible share of the budget for Cohesion Policy leads to Poland, the former Soviet country, assessed mostly by the European Regional and Development Fund, Cohesion Fund and European Social Fund (see Figure 3). The Figure 3 indicates that the redistribution of finances for cohesion policy consider a number of units, demography, and economic development. The Poland is followed by Italy, and Spain, which also draw apparent funds for the Youth Employment Initiative. The second former Soviet country, Romania, is followed by Germany and France which are not financed by the Cohesion Fund. Beside the European Regional and Development Fund, the countries which benefit from the Cohesion Fund (18,14%) mostly are countries of post-soviet block and countries of South Europe (Portugal, Spain, Italy). In regards of the economic crisis, the countries of PIGS are at first half of positions of recipients of the Structural and Investment Funds.

Evaluation of Regional Policy

The evaluation of the effectiveness of the European regional policy is mostly developed by the economic perspective. There are several approaches such as Solow growth model, which predicts that poor regions will grow faster than rich regions (Hodson, 2012, p. 501). Consequently, there is a quasi-experimental approach, the regression discontinuity design (RDD) which demonstrates the effects of

Regional Policy on the economic growth (Crescenzi&Giua, 2014, Pellegrini et al., 2013, p. 227).

Figure 3. The budget by country (EUR billion)



Source: European and Structural Funds. Available at <https://cohesiondata.ec.europa.eu/overview>

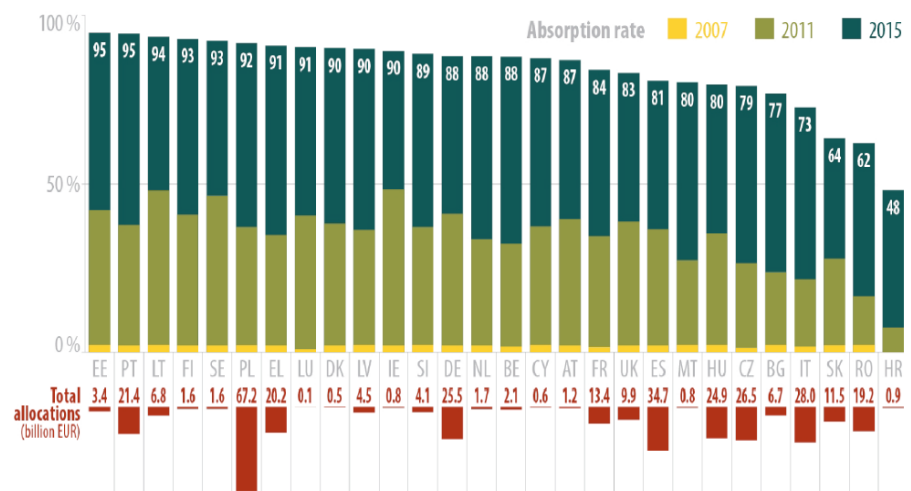
Furthermore, current cross-country studies also underline the statistical techniques of the economic development and compare the data in several countries (Bellini, Ottaviano, Pinelli & Prarolo, 2013).

Among economists and political scientists exists also the approach which examines the effectiveness through the institutional factors (Charron, Dijkstra& Lapuente, 2014, p. 68, Groot&Nahuis in Hodson, 2012, p. 502). As showed the recent study of Crescenzi and Guia „The positive influence of the EU Regional Policy is stronger in the regions with the most favourable socio-economic environment. This reveals a potential paradox of the EU Cohesion policy that works better in the relatively stronger (and better performing) regions with comparatively smaller (although still positive) gains for the most disadvantaged areas of the Union.“ (Crescenzi and Giua, 2014 p. 30) The impact of Structural and Investment Funds of Regional Policy thus performs better in relatively well-developed regions. The better performance of the Regional Policy in those regions then could lead to regional discrepancies and non-correspondence to the assumed priorities.

The social and political perception of the effectiveness of the Regional Policy is demonstrated in the following part of this paper. Concerning the current impact of Regional Policy could be perceived through the allocation of the financial resources for the time period 2007 - 2013. The previous period of redistribution would show us if today's sociological perception to a poverty becomes relevant. The redistribution of finances for 2007-2013 refers to the similar pattern as was described above in the case of the new budget for 2014 – 2020. The big recipients of the Structural and Investment Funds were countries such as Poland, Spain, Italy, Czech republic, Germany, Hungary (Figure 4). In the comparison with the current distribution of resources, the Romania became the full recipient of structural funds after the accession to the EU in 2008. From this perspective is evident, that Romania did not have any opportunities to allocate more finances for regional policy even the time period is fully the

same as membership period. Figure 4 shows the overall absorption of the Funds in percentage. From this point of view, it could be assumed that the best absorption capacities had the states as Estonia, Portugal, Lithuania, Finland and Sweden. Apparently, the rate of absorption of those countries depends on the political culture and allocation of the resources. Comparable to the countries like Slovakia, Italy or Czech republic, the level of corruption could play a role even in the case of „euro funds“.

Figure 4. Structural and Cohesion Funds 2007 - 2013

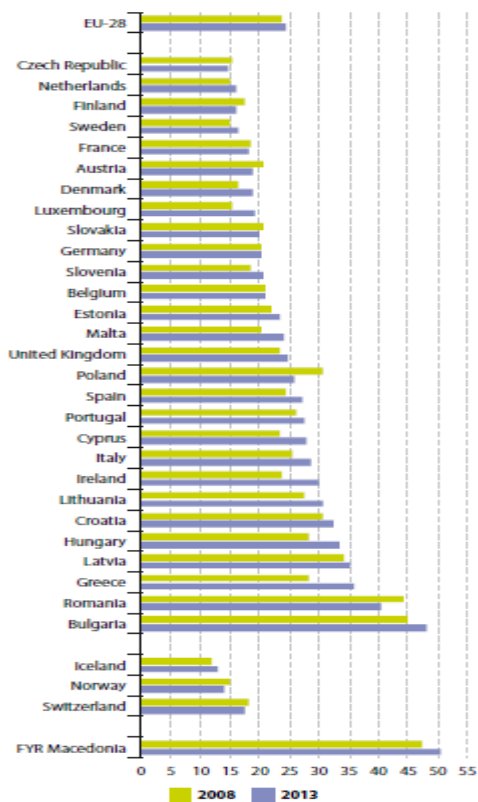


Source: Ionescu & Dietrich (2015) (<https://epthinktank.eu/2015/09/02/cohesion-policy-implementation-in-the-eu28/>)

From a sociological perspective of regional performance, this study analyses the effectiveness of the Regional Policy by using the poverty risk and social exclusion data (based on the EUROSTAT data). Most of the research is done by the evaluation of socio-economic development such as the GDP per capita, income rate, unemployment rate, etc., as was mentioned above. The poverty risk

and social exclusion data (see Picture 1) are showing a comprehensive evaluation of the quality of living on one hand, and the economic development on the other. Because the GDP growth could be considered as a misleading indicator (Balassone, Franco & Zotteri, 2006, Gadrey, 2004) the percentage of people living at poverty risk and social exclusion can show us the real level of social-economic development.

Picture 1. People at risk of poverty or social exclusion, by country



(*) 2010 data (instead of 2008) for EU-28, HR and MK; 2011 data (instead of 2013) for MK; 2012 data (instead of 2013) for IE, HR and CH; EU-28 data for 2013 are estimates; break in time series in 2012 (UK) and 2013 (ES).

Source: Eurostat online data code [\(t2020_50\)](#)

The indicator „People at risk of poverty or social exclusion“ shows a percentage of people affected by at least one of three forms of poverty: monetary poverty, material deprivation or low work intensity¹⁶. What is more, people can suffer from more than one dimension of poverty at one time. According to the statistical data of the year 2013, in the European Union were almost 123 million people at risk of poverty or social exclusion (Eurostat, 2014). As Picture 1 indicates, most countries of the EU in 2013 faced an increase of poverty rate with just a few exceptions of significant decrease such as Poland and Romania (Picture 1). It could be assumed that that is a relative correlation between the Structural and Investment Funds of regional policy and the poverty risk rate in those countries. The hypothesis could be stated as a relation between the percentage of the share of the budget for regional policy and the decreasing poverty index. On the other hand, the countries like Denmark, Ireland, Luxemburg, Hungary, Cyprus, Italy, Greece, Bulgaria performed in 2013 the growth of the poverty share in comparison with the 2008 rate (see Picture 1). From the obvious and general perspective, it could be said, that those countries were mostly „hit“ by the consequences of the economic crisis after 2008. However, as the current statistics of regional poverty rate show (time period 2010-2014), the level of poverty rate is still increasing (Table 2). Moreover, the most affected regions of the European Union are from Italy, Romania, Bulgaria, Spain, Greece, and Poland (Table 2). The cases of Romania and Poland is also indicating big discrepancies of the regions and unpleasant effects of the European regional policy. Although, the significant impact of Structural and Investment Funds from the EU could be visible as an overcoming the consequences of

¹⁶ http://ec.europa.eu/eurostat/statistics-explained/index.php/Europe_2020_indicators_-_poverty_and_social_exclusion

the economic crisis. However, the long-term implications of the regional policy in the context of improving regional poverty rate after the economic crisis were not verified. From this perspective, the Europe as a whole is facing not even the impact of the economic crisis, but also broadening a social crisis of the risk of poverty and social exclusion matters.

Table 2. People at poverty risk and social exclusion by NUTS 2 (% of population)

GEO/TIME	2010	2011	2012	2013	2014
Sicilia IT	47,4	54,3	56,9	55,0	54,4
Sud-Est RO	51,8	50,0	51,7	53,4	52,9
Isole IT	42,2	48,9	49,9	49,4	50,3
Macroregiunea doi RO	51,3	50,7	52,1	50,6	50,3
Campania IT	45,1	48,3	50,1	49,8	49,0
Nord-Est RO	51,0	51,2	52,3	48,9	48,7
Ciudad Autónoma de Ceuta (ES)	35,9	33,6	38,4	47,0	47,9
Yuzhen tsentralen BU	54,3	51,6	52,6	54,2	46,9
Severozapaden BU	53,3	53,9	52,6	52,8	46,1
Severozitochen BU	52,7	52,1	51,0	54,7	45,6
Región de Murcia ES	37,5	31,9	33,5	34,1	44,9
Severna i yugoiztochna Bulgaria	53,8	54,5	53,7	51,8	44,0
Severen tsentralen BU	58,7	59,5	53,9	48,4	43,7
Calabria IT	41,5	47,1	46,4	45,6	43,5
Sud IT	39,7	44,7	46,7	45,0	43,4
Sud-Vest Oltenia RO	48,0	44,8	46,9	45,6	42,7
Sur (ES)	35,4	37,4	36,2	37,7	42,6
Andalucía ES	35,0	38,4	36,9	38,3	42,3
Macroregiunea patru RO	42,1	39,3	41,9	41,8	41,5
Yugoiztochen BU	51,1	53,2	56,7	51,1	41,2
Sud – Muntenia RO	42,7	43,1	43,5	40,9	40,8
Molise IT	32,0	33,8	36,1	44,7	40,7
Puglia IT	36,3	42,0	49,0	43,6	40,6
Kentriki Ellada (NUTS 2010) GR	33,0	:	:	39,3	40,5
Romania	41,4	40,3	41,7	40,4	40,2
Bulgaria	49,2	49,1	49,3	48,0	40,1
Vest RO	35,5	33,1	36,2	37,5	40,1
Extremadura ES	40,3	36,0	35,2	36,1	39,8
Basilicata IT	35,2	47,6	46,9	48,5	39,6
Nisia Aigaiou, Kriti GR	23,9	:	:	33,7	39,4
Sardegna IT	26,2	32,4	28,4	32,2	37,7
Voreia Ellada (NUTS 2010) GR	31,5	:	:	36,0	37,1
Canarias (ES)	35,7	37,8	40,3	35,5	37,0
Canarias (ES)	35,7	37,8	40,3	35,5	37,0
Castilla-la Mancha ES	32,3	35,3	35,1	36,7	36,9
Alföld és Észak HU	36,6	37,7	40,1	40,8	36,9
Yugoiztochna i yuzhna tsentralna Bulgaria	44,2	43,3	44,6	44,1	36,1
Greece	27,7	31,0	34,6	35,7	36,0
Centru RO	30,3	28,5	31,6	32,8	35,4
Macroregiunea trei RO	39,4	37,3	38,9	36,6	34,8
Comunidad Valenciana ES	29,6	27,9	30,6	31,7	34,7
Macroregiunea unu RO	30,6	31,5	31,8	31,8	33,6
Centro (ES)	30,1	29,7	28,7	29,6	32,7
Latvia	38,2	40,1	36,2	35,1	32,7
Nord-Vest RO	30,8	34,3	31,9	30,9	31,9
Hungary	29,9	31,5	33,5	34,8	31,8
Attiki GR	23,1	:	:	34,0	31,6
Border, Midland and Western IR	28,8	33,2	34,7	36,6	31,2

Abruzzo IT	27,4	34,3	27,7	26,1	29,5
Croatia	31,1	32,6	32,6	29,9	29,3
Spain	26,1	26,7	27,2	27,3	29,2
Közép-Magyarország HU	25,4	26,0	28,5	32,4	29,1
Region Wschodni(PL)	:	:	33,4	30,6	29,1
Yugoapaden BU	36,9	37,4	39,1	37,1	28,6
Italy	25,0	28,1	29,9	28,5	28,3
Dunántúl HU	25,3	28,6	29,5	29,3	27,8
Ireland	27,3	29,4	30,0	29,5	27,6
Region Północny (PL)	:	:	25,8	26,4	27,5
Portugal	25,3	24,4	25,3	27,5	27,5
Cantabria ES	22,5	23,0	24,1	25,3	27,4
Cyprus	24,6	24,6	27,1	27,8	27,4
Lithuania	34,0	33,1	32,5	30,8	27,3
Este (ES)	23,9	24,3	25,7	25,0	26,7
Liguria IT	16,4	19,4	21,4	23,4	26,5
Southern and Eastern IR	26,7	28,0	28,3	27,0	26,3
Castilla y León ES	23,8	22,3	20,4	20,8	26,1
Estonia	21,7	23,1	23,4	23,5	26,0
Ciudad Autónoma de Melilla (ES)	35,4	34,7	14,5	31,4	25,8
Bucuresti – Ilfov RO	34,4	28,4	31,5	30,3	25,7
Lazio IT	22,4	24,1	28,3	26,1	24,7
Poland	27,8	27,2	26,7	25,8	24,7
Noroeeste (ES)	21,2	21,1	24,0	23,9	24,2
Region Południowo-Zachodni PL	:	:	26,6	25,2	24,1
United Kingdom	23,2	22,7	24,1	24,8	24,1
Region Północno-Zachodni PL	:	:	27,1	24,6	24,0
Galicia ES	22,7	21,0	23,8	24,3	23,8
Illes Balears ES	26,0	26,7	25,1	27,8	23,8
Malta	21,2	22,1	23,1	24,0	23,8
Principado de Asturias ES	16,5	20,4	24,5	21,8	23,4
Region Centralny (PL)	:	:	23,6	23,6	22,6
Moravskoslezsko	18,9	22,0	20,9	22,9	22,5
Vzhodna Slovenija (NUTS 2010)	21,6	22,3	22,5	22,5	22,5
Centro (IT)	19,9	22,3	24,9	22,8	22,1
Severozápad	21,3	24,6	23,7	25,8	21,9
Umbria IT	17,7	20,7	22,0	22,7	21,9
Cataluña ES	19,8	21,6	22,6	20,1	21,8
Region Południowy (PL)	:	:	24,5	24,7	21,7
Pohjois- ja Itä-Suomi FI	19,5	20,6	21,2	19,7	21,6
Belgium	20,8	21,0	21,6	20,8	21,2
Mellersta Norrland SWE	10,9	17,3	17,6	18,7	21,1
Východné Slovensko	25,2	24,6	22,7	21,9	21,0
Aragón ES	17,5	18,6	18,4	19,8	20,7
Germany (until 1990 former territory of the FRG)	19,7	19,9	19,6	20,3	20,6
Slovenia	18,3	19,3	19,6	20,4	20,4
Stredné Slovensko	21,1	20,9	22,1	20,0	20,2
Aland FI	9,1	11,7	20,5	25,5	20,2
La Rioja ES	27,3	26,1	22,6	22,2	20,1
Norra Mellansverige SWE	17,9	16,4	16,9	19,4	20,1
Marche IT	18,4	21,9	23,2	21,8	19,6
Småland med öarna SWE	16,2	17,3	16,0	18,0	19,3
Comunidad de Madrid ES	19,3	18,6	19,8	20,1	19,2
Comunidad de Madrid ES	19,3	18,6	19,8	20,1	19,2
Toscana IT	17,5	20,0	21,2	18,4	19,2
Austria	18,9	19,2	18,5	18,8	19,2
Nord-Ovest IT	16,2	17,8	19,8	18,0	19,1
Norra Sverige SWE	15,3	16,1	17,5	17,6	19,1
Luxembourg	17,1	16,8	18,4	19,0	19,0
Piemonte IT	18,2	21,8	20,3	16,5	18,8
Sydsverige SWE	16,8	17,3	18,5	19,9	18,7
France	19,2	19,3	19,1	18,1	18,5
Hovedstaden DN	20,0	17,4	19,2	16,7	18,4
Slovakia	20,6	20,6	20,5	19,8	18,4
Södra Sverige SWE	15,9	17,0	16,6	17,5	18,3
Sjælland DN	16,0	17,5	19,2	16,3	18,1
Midtjylland DN	19,7	19,3	19,5	21,3	18,1
Lombardia IT	15,2	15,9	19,3	17,7	18,1

Etelä-Suomi FI	18,0	19,2	18,8	17,5	18,0
Denmark	18,3	18,9	19,0	18,3	17,9
West-Nederland NE	:	15,8	16,2	17,4	17,9
Zahodna Slovenija (NUTS 2010)	14,7	16,1	16,5	18,1	17,9
Syddanmark DN	16,9	21,5	19,1	17,0	17,7
Länsi-Suomi, Åland FI	16,6	18,9	18,6	16,0	17,7
Västsverige SWE	15,0	16,7	15,6	15,7	17,7
Valle d'Aosta/Vallée d'Aoste IT	14,5	13,6	15,0	21,3	17,5
Finland	16,9	17,9	17,2	16,0	17,3
Noreste (ES)	17,1	18,5	17,5	17,7	17,2
Manner-Suomi FI	16,9	18,0	17,2	15,9	17,2
Střední Morava	16,3	16,4	16,0	14,7	17,0
Veneto IT	16,1	16,2	17,1	16,1	16,9
Sweden	15,0	16,1	15,7	16,4	16,9
Nordjylland DN	17,2	17,4	16,4	20,5	16,5
Netherlands	15,1	15,7	15,0	15,9	16,5
Bratislavský kraj	13,8	17,1	16,9	19,6	16,5
Östra Mellansverige SWE	15,7	16,7	16,4	17,3	16,5
Emilia-Romagna IT	12,7	15,7	16,0	17,8	16,4
Friuli-Venezia Giulia IT	14,6	16,3	18,0	16,1	16,3
Oost-Nederland NE	:	16,0	14,3	14,1	16,3
Nord-Est IT	14,2	15,7	16,7	16,5	16,2
Övre Norrland SWE	15,1	14,8	18,2	14,0	16,2
Noord-Nederland NE	:	17,6	15,1	16,4	15,8
Západné Slovensko	18,6	18,1	18,7	17,7	15,4
Pais Vasco ES	16,3	18,9	17,7	16,8	15,3
Czech Republic	14,4	15,3	15,4	14,6	14,8
Comunidad Foral de Navarra ES	13,8	13,1	12,0	14,5	14,5
Östra Sverige SWE	13,9	15,1	13,8	14,7	14,5
Severovýchod	11,4	13,8	13,2	13,8	14,0
Zuid-Nederland NE	:	14,5	13,0	14,2	13,9
Provincia Autonoma di Trento IT	10,8	14,4	19,2	13,2	13,6
Jihovýchod	15,0	14,2	13,7	11,1	12,8
Stockholm SWE	12,3	13,6	11,6	12,4	12,8
Helsinki-Uusimaa FI	13,9	13,8	11,3	11,6	12,6
Jihozápad	13,6	14,6	12,4	11,5	12,5
Praha	7,1	9,1	12,5	10,2	10,2
Střední Čechy	12,4	9,6	12,3	9,9	9,8
Provincia Autonoma di Bolzano/Bozen IT	10,6	11,1	12,2	12,4	9,7
Région de Bruxelles-Capitale / Brussels Hoofdstedelijk Gewest BE	40,2	40,4	:	:	:
Vlaams Gewest BE	14,8	15,0	:	:	:
Région wallonne BE	25,7	25,4	:	:	:
Itä-Suomi (NUTS 2006) FI	:	:	:	:	:
Etelä-Suomi (NUTS 2006) FI	:	:	:	:	:
Pohjois-Suomi (NUTS 2006) FI	:	:	:	:	:

Source: Authors processing based on the EUROSTAT data

Conclusion

The Regional Policy, known as Cohesion Policy, has become the major policy of the European Union. The development of the Regional Policy indicates that the interest of the European Union in the cohesion and the socio-economic development is apparent while 71,2% of the overall budget of the EU is allocated to the Structural and Investment Funds of Cohesion Policy. The Regional Policy is based on the cohesion, the balancing of the regional diversities in socio-economic

perspective. Moreover, the European Union's basic principle, a solidarity, has triggered the bigger allocation of finances to regions in need. However, the growing amount of financial resources to the Regional Policy has been redistributed, the European Union faces several challenges. Under the changing environment of social modernity and structure, the Europeans have been suffering the material deprivation in last years. With the attention to the rising inequality and increasing GDP, this paper focused on the not traditional indicator of the social and economic situation. The rate of poverty and social exclusion showed that the percentage of people at the edge of poverty is increasing even in the developed countries (Luxemburg). The impact of Regional Policy from the perspective of poverty index did not meet its goal achievements, even they were aimed directly to the improvement of the lives of the Europeans.

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Religious freedom in the era of migration of the XXI century¹

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Abstract

The aim of present paper is to present possible consequences of anti-immigrant sentiments which could be observed nowadays in Europe on the understanding of religious freedom. After describing the present-day phenomenon of migration against the background of the twentieth-century migration, the authors present two different strategies towards religious freedom in the era of migration, which could be found in legal philosophy. The paper combines the way of describing the phenomena from the point of view of political science with its analysis from the perspective of legal philosophy. In authors' opinion, both fear, stereotypes and prejudices may adversely affect European standards of religious freedom, causing limits to be placed on it, which can be easily justified by the need to combat fundamentalism and terrorism inspired by religion. Moreover, these standards can be preserved – as Jürgen Habermas put it – only through the recognition of the principle of reciprocity, of mutual respect for one another's views by the followers of all religions and believers and unbelievers.

Keywords: religious freedom, immigrants, refugees, legal philosophy, Jürgen Habermas, Günther Jakobs

¹ The project was financed from the sources of the National Science Centre (Narodowe Centrum Nauki) according to the decision No. DEC-2013/09/BH55/04436.

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Introduction

The aim of present paper is to present possible consequences of anti-immigrant sentiments which could be observed nowadays in Europe on the understanding of religious freedom. At the beginning, we describe the present-day phenomenon of migration against the background of the twentieth-century migration. The next step consists in identifying the European standards of religious freedom. Then, we try to indicate the possible consequences of the anti-immigrant fears on the scope of religious freedom. The last part is devoted to present two different strategies towards religious freedom in the era of migration, which could be found in legal philosophy. The paper combines the way of describing the phenomena from the point of view of political science with its analysis from the perspective of legal philosophy.

Migration movements: a natural phenomenon

The present article may be best introduced by Ryszard Kapuściński's observation: "The world is moving on a scale unknown in history. People all sorts of races and cultures are coming together throughout this more and more populated planet" (Kapuściński, 2006, p. 33). These words are a reflection of the current situation in the world, especially in Europe. Migration movements are not a new or strange phenomenon, but their scale in the twenty-first century has surprised everyone. Population movement – migration – is a natural phenomenon. Its causes over the centuries have included climate change and the need to escape from security threats, political or religious persecution, and natural disasters; and also political decisions, economic problems and human curiosity about the world (Czerniejewska, Kosowicz, & Marek, 2009, p. 11). Exile has a long history, given that the first records of it can be found

in sources created over 3,500 years ago. The phenomenon of flight and displacement have existed in human history since people have gone to war with one another; since there have been power, and systems of government; and since we have competed with each other for what is desirable in terms of crops, mineral wealth and territory. The tradition of the wandering pilgrim goes back to the mythological topos *homo viator*: the so-called human wanderer and wayfarer. The sentence of exile was sometimes considered more severe than the death penalty. Archetypes of the wanderer included Odysseus from Homer's work, and Moses from The Bible. An exile, an outlaw, is someone who leaves their home country. Euripides' drama from the 5th century BC, *Herakles' Children* (*Hērakleidai*), narrates the story of exiled children who find protection from persecution in Athens. The biblical description of the return of the Israelites from Egypt represents the return of refugees to their country of origin (Czerniejewska, Kosowicz, & Marek, 2009, p. 12).

In the history of Polish emigration waves of a political nature emerged after the third partition of Poland (1795), which constituted the end of the existence of the huge state called the Polish-Lithuanian Commonwealth, and after unsuccessful uprisings: the November Uprising (1830–1831) and the January Uprising (1863–1864). As for the age of the twentieth century, large numbers of people, as a result of resettlement or out of fear of persecution and political repression, left Poland's territory during World War II (the exact number is difficult to estimate). Another more significant wave of Polish emigration took place in the 1980s, in the last years of the communist system.⁴ A common feature of all these migratory movements was

⁴ In 1980–1988, 800,000 Polish citizens left the country. In 1981–1986 the average annual number of emigrants amounted to 60 000 people. (Sakson, 1989, pp. 28–35).

that they concerned mostly the elite of Polish society. The theme of the pilgrim – the exile – appeared for the first time in Polish literature in the Romantic period. After the fall of the November Uprising thousands of Poles, including many artists, became immigrants. They were forced to spend the greater part of their lives abroad. The fate of immigrant also touched the Polish romantic poets: Adam Mickiewicz was sent to Russia, then lived in Germany, Italy and Paris; Juliusz Słowacki lived away from his home country after 1831, just as Cyprian Kamil Norwid left the country at the age of only 21.

The population movements in the twentieth century

Europe in the twentieth century witnessed the first mass population movements in history characterized by the wandering of up to hundreds of thousands and even millions of people at a time. The reasons for this included the disintegration of multinational states and the formation of nation-states, the rise of totalitarian regimes, armed conflicts and the persecution of ethnic minorities (Potyrała, 2005, p. 17 ff.). A special type of a person leaving their country is a refugee (Latin *refugium*, French *réfugié*), a definition included in the Geneva Convention, signed in 1951 in Geneva, and which, together with the New York Protocol (1967) constitute the basis for international refugee protection. According to art. 1A of the Geneva Convention, a refugee is a person who feels a well-founded fear of persecution because of his or her race, religion, nationality, membership in a particular social group or political views, is outside the country of his or her nationality and because of these fears does not want or cannot return to this country (Potyrała, 2005, p. 13).

The Geneva Convention assumes the so-called principle of non-turning back or *non-refoulement*: the refugee is not to be sent back to

their country of origin if the danger of persecution awaits them there. However, there are two exceptions: when a person threatens the security of the host country, or if that person is a legally convicted war criminal. Thus, a refugee is a person who has crossed an international border, leaving their own country of origin; the reason for this journey was the fear of persecution (not economic factors!), and the reason for this persecution was race, nationality, religion or political views; they do not want to or cannot return to their country of origin. Both the Geneva Convention and the New York Protocol assume that the case of every person applying for protection is considered individually. Until September 26th, 1991, the Polish law failed to respect the provisions of the Geneva Convention and the New York Protocol. At that time the Constitution of July 22th, 1952 (*Dziennik Ustaw [Journal of Laws]*, 1952, No. 33, item 232) was in force. Its article 75 provided asylum without refugee status to citizens of other countries in those cases where they were persecuted “for defending the interests of the working masses, the struggle for social progress, the struggle for national liberation or scientific activities” (Kawczyńska-Butrym, 2009, p. 130).

African states (1969, The Convention of the Organization of African Unity) and the states of South America (1984, Declaration of Cartagena) adopted their own definition of a refugee, with a broader meaning, in view of the problems related to armed conflicts, including civil wars, on these continents (Kawczyńska-Butrym, 2009, p. 15).

Further, the Asian continent has faced refugee problems on a larger scale: the civil war in China caused approximately 30 million Chinese people to become refugees, after the victory of the revolutionary army of Mao Tse Tung. During one year approximately 2.2 million Chinese people fled along with the deposed government to Taiwan,

and another million to the British crown colony of Hong Kong. Moreover, after the division of the Korean peninsula approximately one million people fled from the north to the south, and millions more fled during the Korean War. Since 1947, when the division of British India (into India and Pakistan) took place, approximately 40 million people have been forced to cross the new border or to move within that geographic region (Nuscheler, 1995).

The migration movements of 2015

On December 14, 1950, The General Assembly of the United Nations created the Office of the United Nations High Commissioner for Refugees (UNHCR, represented in Poland since 1992), which is tasked to conduct and coordinate international action to protect refugees and resolve issues related to this matter. The primary objective of the UNHCR is to protect the rights and well-being of refugees. The office strives to ensure that every person can take advantage, according to their designated rights, to seek asylum and find safe refuge in another country, with the possibility of voluntary return home (The UN Refugee Agency in Poland, <http://www.unhcr-centraleurope.org/pl/o-nas.html>). The UNHCR publication titled *Mid-Year Trends 2015*, which covers the period from January to June 2015, by putting forced resettlement in a global perspective, reveals an increase in all indicators in three major categories: refugees, those applying for refugee status and the internally displaced. The number of refugees, which at the end of 2014 amounted to 19.5 million, in mid-2015 exceeded 20 million for the first time in 23 years. The number of applications for refugee status was 78% higher than in 2014 and amounted to almost a million. In the first half of 2015, individuals representing at least 190 nationalities submitted asylum applications in 155 countries around the world. Given that the report applies only

to persons covered by the protection of the UNHCR, it can be stated that at the end of 2015 the number of displaced persons, for the first time in history, exceeded 60 million. Every second person who in 2015 slipped by sea into Europe is a citizen of Syria, 20% were citizens of Afghanistan, 8% from Eritrea, 4% from Nigeria, 3% from Iraq, 2% from Sudan, 2% from Somalia and the remaining 1% from Zambia, Senegal and Bangladesh (*Coraz więcej przymusowo przesiedlonych. Ten rok pobije wszelkie rekordy*, <http://www.unhcr-centraleurope.org/pl/wiadomosci/2015/coraz-wi%C4%99cej-przymusowo-przesiedlonych.-ten-rok-pobije-wszelkie-rekordy.html>).

According to the UNHCR, the largest number of immigrants from Africa and the Middle East arrived in Greece (244,855), and the destination with the next-largest number of refugees was Italy (119,500). Most of the migrants, however, designate their ultimate destination as Sweden or Germany. Out of more than 4 million refugees from Syria, more than 1.9 million have sought refuge in Turkey; 1.1 million are in Lebanon; 630 thousand in Jordan; and 250 thousand in Iraq. Since the outbreak of the conflict in Syria in 2011 until July 2015, Europe has accepted 348.5 thousand asylum applications from Syrians (Czarnecki, Jałoszewski, Bielecki, & Urzędowska, 2015, September 8th). According to the UNHCR, men constitute 75% of all the people who this year reached the European Union countries by the Mediterranean Sea (this is confirmed by Eurostat data, which shows that the percentage of men among the Syrians asylum seekers is 85%). Women make up 12% and children, 13%. Of those on the Balkan route, starting from Greece, men were 69%, women 12% and children 19%. In Turkey, neighboring Syria, males and females constitute about 50% each (Czarnecki, Jałoszewski, Bielecki, & Urzędowska, 2015, September 8th). In the first eight

months of 2015, 351,314 people arrived in Greece, Italy and Spain, braving the Mediterranean Sea. According to Polish Humanitarian Action, a non-governmental organization providing support to refugees: “in 2014, 42.5 thousand people each day became refugees or persons displaced within their own country. That is four times more than four years ago” (*Na granicy wystarczy powiedzieć azyl...*, September 5th, 2015).

It is worth noting that in addition to the statistics of the previously-mentioned UNHCR, there are several sources of data on migrants arriving in Europe, among which the two most important should be mentioned: Eurostat, which collects statistical data on applications for refugee status in the European Union, and Frontex (European Agency for the Management of Operational Cooperation at the External Borders of the Member States of the European Union), the agency collecting data on the number of illegal crossings of the EU’s external borders. Depending on the agency, data for 2014 and 2015 significantly differ (Table 1), yet confirm that in 2015 there was a very significant increase in the number of newcomers to Europe compared to 2014.

Table 1. Border-crossings statistics of the European Union

source and type of data	2014	2015
UNHCR: arrivals via the Mediterranean Sea	216,054	894,511 (up to the end of November)
Eurostat: applications for refugee status	627,780	870,000 (up to the end of October)
Frontex: the number of illegal border crossings at the EU’s external borders	282,000	1,236,887 (up to the end of October)

Source: University of Warsaw (Uniwersytet Warszawski), Ośrodek Badań nad Migracjami (2015). *Biuletyn Migracyjny* (No. 53/December 2015). Retrieved on: <http://biuletynmigracyjny.uw.edu.pl/pliki/pdf/biuletynmigracyjny53.pdf>.

Unfortunately, the exodus of refugees has also been conducive to the rise in unsavoury trends such as the arrival of people associated with the Islamic State (ISIS), “hidden” labour migration, smuggling, human trafficking, violence, prostitution and drug trafficking.

Europe, taking refugees from the area of the struggle of war, is experiencing its own, quite different, drama and is facing two major questions. The first is: how may it ensure, or perhaps try to ensure, that refugees have decent living conditions? The second: how may successive waves of displaced people be stopped? In addition, the immigration crisis has exposed the fatal condition in which Europe finds itself now.

The present-day migration movements and the ethnic and religious stereotypes

Europe faces new challenges in relation to forecasts that in 2016, in comparison with the previous year, the number of asylum seekers in Europe may be even greater. In a study on feelings associated with refugees in Europe, conducted by YouGov, over 9,000 people took part. Of all answers given by European citizens, three have been selected that occurred most frequently in each country: in the United Kingdom: sadness, irritability and anger; in Germany, fear, helplessness and irritability; in France, anger, sadness and fear; in Denmark, sympathy, sorrow, and helplessness; in Sweden, sorrow, disgust and compassion; in Finland, compassion, anger, and irritability; and in Norway: sadness, grief and helplessness (*Britain among worst rated for handling of European refugee crisis*. <https://yougov.co.uk/news/2015/09/27/european-refugee-crisis>). Such an attitude will not help to resolve the issue of refugees in Europe.

A major, if not the most important, problem relating to the phenomenon of refugee movement in the twenty-first century in

Europe has begun to be, both in social and individual terms, the cultural context. In social terms, this refers to the influx of large numbers of refugees, living in a different culture than the culture/cultures of the host country. Cultural differences can be a barrier to understanding and integration. In the case of Muslim culture the differences may relate to such areas of life as habits, customs, language, mentality, family functioning, role of women, the preservation of tradition through dress, ways of behavior, systems of values, and above all religious practices. Foreigners who come to Europe are seen as a homogeneous group – believers in Islam – it is they who constitute the vast majority of refugees (cf. University of Warsaw (Uniwersytet Warszawski), Ośrodek Badań nad Migracjami (2015). *Biuletyn Migracyjny*, No. 53/December 2015). The problem, in addition to ensuring refugees the daily needs of shelter and a modest meal, is becoming how to enable them to cultivate their own traditions, often so different from those that are practiced in an increasingly secularized Europe, and for this reason even more incomprehensible, often unacceptable. We see, therefore, a classic clash of civilizations: Islamic culture versus Christian culture. This conflict greatly promotes mutual stereotyping.

The stereotype constitutes a specific element of culture that is perpetuated in the process of socialization and generally occurs in groups. This is the transmission of simplified views and judgments that one group assigns the other. Erving Goffman notes that society creates a specific system of categorization of what is normal, desirable, appropriate and typical in relation to the behavior, values or character traits, even clothing. Such an approach may lead to a negative stigmatization of refugees in Europe. Antipathy towards refugees, defined as islamophobia, can be seen more and more

clearly in European countries (Kawczyńska-Butrym, 2009, pp. 83–85). Possibly, a solution will involve cultural bivalence, according to which “the determinant of the integration process is the formation of a double sense of national identity, the assimilation of two cultures” and breaking down the barriers between one’s own people and those who are seen as foreign (Kawczyńska-Butrym, 2009, p. 85).⁵ The vast majority of immigrants from Syria are Muslims (though about 10% of the population are Christians, most of whom belonged to the Eastern Churches) (*International Religious Freedom Report 2006*). Writing about the religious attitudes of the Syrians, we should also remember that the Alawi people, who constituted the ruling elite in Syria, allowed a relatively significant degree of religious pluralism (Sasnal, 2015, p. 4).

5 The so-called dual national consciousness (a term by Władysław Wielhorski) was created in the sixteenth and seventeenth century in the Grand Duchy of Lithuania, a component of the Polish-Lithuanian Commonwealth, and survived there until the second half of the nineteenth century. Yet, this type of consciousness embraced primarily the nobility, who had political rights (to a much lesser extent, the townspeople). Ethnic or religious differences marked the consciousness of “the first-level” there, while the citizenship of one state – the Polish-Lithuanian Commonwealth – marked the consciousness of “the second degree”. The gentry culture (“sarmatian”), which was the culture of the Polish language, became dominant culture in this country (cf. Wielhorski, 1953, pp. 238–240; Litwin, 1993, p. 199). We believe that this type of awareness could have been formed in countries with large territories, allowing considerable cultural autonomy of particular groups of citizens in everyday life, and at the same time characterized by the presence of the dominant culture which acts as a factor that integrates the society (this type of consciousness existed and still exists in, e.g. the United States of America and some Asian areas of Russia). It seems, therefore, that the formation of a “cultural bivalence” and a two-level awareness among immigrant groups in Europe today depends on whether European culture is strong enough to play the role of the dominant culture. This is possible only if the culture is perceived by them as attractive enough to want to harmonize with it some elements of their own culture.

Today it is forecast that by the end of the 21st century, migrations of population will change the world so severely that there will not be a single uniform state in terms of religion or faith (Pomarański, 2014, p. 157). This in turn highlights the importance of religious freedom in the modern world, especially in Europe, where migration processes are greater than ever.

Table 2. Muslims in European countries

Muslim population by percentage	Country
< 5%	Austria, Belgium, Spain, Germany, Switzerland, Sweden, Italy
5–10 %	Denmark, France, Serbia. Montenegro
10–50%	Bosnia and Herzegovina, Macedonia
> 50%	Albania, Kosovo, Turkey

Source: *Muslims in Europe: Country guide*. Retrieved on February 27th, 2016, from <http://news.bbc.co.uk/2/hi/europe/4385768.stm>.

Stereotypes and religious freedom

The worldwide standard of religious freedom is designated in Article 18 of the International Covenant on Civil and Political Rights of 1966. On the other hand, in the European Convention for the Protection of Human Rights and Fundamental Freedoms of 1950, Article 9 is almost identical to what is contained in the International Covenant: “Everyone has the right to freedom of thought, conscience and religion; this right includes the freedom to change their religion or belief and the freedom, either alone or in community with others and in public or private, to manifest their religion or belief, in worship, teaching, practice and observance”. As Witold Sobczak writes, this provision plays a fundamental role in the process of designating

European standards of freedom of religion. However, this provision is very general and produces only the basis of standards that are formulated by the European Court of Human Rights. These standards, contained in the case-law of this Court, are also general and moreover they change over time (Sobczak, 2013, pp. 683–684).⁶ In addition, rulings of the Court are not accepted indisputably, as evidenced by the public debate around the judgment in the case of *Lautsi vs. Italy*.⁷

Anti-immigrant and anti-Islamic sentiment in Europe, leading to the strengthening of the aforementioned religious stereotypes, can lead to restriction of freedom of religion, especially in areas such as the externalization of religion through religious dress, the freedom to teach and the practice of worship through the construction of religious facilities. This has already happened in Switzerland, where in a referendum on November 29th, 2009, citizens – despite the opposition of the government, the churches and religious organizations, including the Catholic Church – decided to impose a provision prohibiting the construction of minarets on the territory of the whole country. Supporters of the ban argued that minarets are

⁶ An illustration of these changes may be a matter of refusing military service on religious grounds. Initially, the Court did not recognize this law as one that falls in the standards of religious freedom. However, in its judgment in *Bayatyan vs. Armenia* of July 7, 2011, the Court argued that criminal liability for refusing military service is a violation of art. 9 of the European Convention (Sobczak, 2013, pp. 458–462).

⁷ *Lautsi vs. Italy*, complaint No. 30814/06. According to the applicant, hanging crucifixes in classrooms violates negative religious freedom. Chamber (Section II) of the Court accepted that position in its judgment of 3 November 2009 respectively. However, the Grand Chamber of the Court, which considered the matter at the request of the Italian Government, in its judgment of 18 March 2011, issued a different decision.

only the creations of an architectural tradition developed many centuries ago in Asia and Africa, and not the precepts of Islam, which by no means require that the minarets be built next to mosques. Therefore, this restriction does not affect, according to their supporters, the essence of religious freedom. In addition, it was argued that minarets are incompatible with the cultural landscape of Switzerland. It should, however, be noted that in Switzerland the implemented ban violates the principle of equality of churches and religious associations, which lies at the basis of religious freedom. It is in fact, exclusively aimed at followers of one religion, and therefore it is discriminatory.⁸ The American philosopher of law Ronald Dworkin rightly stated that it was aimed at the culture of Islam and “declared war on the egalitarian ideal of ethical independence” (Dworkin, 2013, p. 146).⁹

⁸ At this point it should be noted that the protection of the cultural landscape can be developed in a way that does not violate religion. One can, for example, impose restrictions on the amount and size of minarets, as well as other similar buildings in historic city centers or in places of historical importance. Besides, existing in many countries regulations to protect monuments or historical landscape allow such restrictions, but do not lead to discrimination, because the same regulations apply to churches and religious associations, as well as private entrepreneurs who want to build, for example, shopping centres in the given area.

⁹ Dworkin argues that the arguments of supporters of the minaret ban show the weakness of the traditional approach of religious freedom as a special right which must be strictly defined and can be restricted only in cases defined by law. Indeed, advocates of the ban, even though the intention of its introduction was easy to guess, argued that it does not limit the freedom of religion, as the need for construction of minarets does not stem directly from the principles of Islam, and in a sense they were right anyway. Therefore, according to Dworkin, a general right to ethical independence should replace religious freedom. Dworkin argues that the right to ethical independence can be reduced if it can be justified by means of non-discriminatory, well-founded reasons which also cannot undermine the equality of all persons before the law. At this point, we cannot engage ourselves in a wider polemic with Dworkin’s concept; however, we will only state

Migrants, religious freedom and legal philosophy

Fear of terrorism inspired by Islam, which is growing in Europe in connection with the wave of migrants, could lead to double standards of legislation: one for ordinary citizens, and the other in relation to the so-called enemies. Theoretical justification for such action is presented by the German philosopher of law Günther Jakobs, who created the concept of “criminal law of the enemy” (*Feindstrafrecht*). This concept is based on the distinction between the “civil” perpetrator and the perpetrator-enemy. While the “civil” criminal, despite committing a crime, does not deny completely the legal order of a democratic state, the offender-enemy tends to the destruction of this order.¹⁰ “Civil” criminal law (*Bürgerstrafrecht*) is based on guarantees, already formulated during the Enlightenment, of individual rights, including among others the right to privacy and the presumption of innocence; it may apply only to the first of these perpetrators of criminal acts. The sphere beyond the scope of legal regulation – the “inner civil sphere” (*interne bürgerliche Sphäre*), including, among others, family life, property and the inviolability of the home and freedom of conscience and religion – may be recognized only in the case of “civil” criminals. The “enemy criminal law” (*Feindstrafrecht*), however, is addressed to the other category of offenders who are recognized by law as a source of danger and therefore are barred from the realm of legally protected privacy (Gruszecka, 2012, p. 210). It is interesting that Jakobs, justifying his concept, refers to Immanuel Kant’s idea of the social contract and his

that since the right to ethical independence is to be the law embracing only individuals, not communities, this concept can justify a restriction on collective religious freedom – entitled to churches, religious associations and communities.

¹⁰ According to Claire Saas, Jacob’s concept applies to enemies who threaten society, and not only the territory of the state (Saas, 2012, p. 2).

philosophy of law. It seems that in this way he attempts to remain in a frame of a rational discourse about the state and law, derived from the ideas of the Enlightenment. The enemy is, according to Jakobs, one who is not accepting the conditions of civil society (*“wer sich nicht in einen bürgerlichen Zustand zwingen laßt”*). This means that such people do not accept the state’s constitutional order. They cannot therefore be treated as persons (*Personen*) in the legal sense (Jakobs, 2004, p. 97, 100; cf. Jakobs, 2014, p. 420). By negating the civil (constitutional) order, the “enemy” continues to exist in a “state of nature”, which is understood as Thomas Hobbes described it in the seventeenth century: a state of war of all against all. According to Jakobs, the protection of peace requires, in view of the presence of such “enemies”¹¹, the use of, for example, means of surveillance. It should be noted that Jakobs’ theory leads to the calling into question of both the right to privacy and the understanding of religious freedom (freedom of conscience and religion) formulated during the Enlightenment, according to which if external religious freedom may be subjected to certain restrictions associated with public policy, meaning here the need to ensure the good of society and the rights and freedoms of other persons and communities, religious freedom relative to the private sphere (i.e. religious freedom in the internal aspect) cannot in any way be limited (cf. Messner, 1966, p. 437; Fel, 2012, p. 128).

Working on standards of religious freedom in a democratic state must be seen as the shared responsibility of all citizens – both citizens and the newly arrived population – as well as churches and religious associations, and not just government or various judicial bodies. Jürgen Habermas rightly points this out in his concept of

11 Jacobs has been criticized for having used his category of the enemy that is not precise enough (cf. Gruszecka, 2012, pp. 214–215).

multiculturalism. Habermas shows the conditions of participation of churches and religious associations in rational public discourse, on which his model of deliberative democracy is based, and the conditions of tolerance in a democratic country, as well as exceptions to the principle of tolerance. “Constitutional consensus”¹² is, according to Habermas, a cornerstone of democracy, and its component is a world view where state authority is neutral, leading to its separation from the Church (churches) (Habermas, 2008, p. 113). Thus, the denominations and religious associations that call into question the neutrality of the world view of the authorities exclude themselves from the realm of rational public discourse. According to Habermas, the incorporation of “normative foundations of the liberal state” by all religions is a prerequisite for the maintenance of tolerance and religious freedom (Habermas, 2008, p. 234). The principle of reciprocity (cf. Habermas, 2008, pp. 265–266), which stems from the recognition of the equality of all citizens, in turn, constitutes today the basis of tolerance. This principle means respecting the beliefs of others, and thus respect by atheists of the beliefs of religious people, and *vice versa*. Representatives of all religions must take into account one another’s views, not question them as absurd, and also respect the beliefs of atheists and agnostics. That is why Habermas accepts multiculturalism, but only the variant which is based on the acceptance by all ethnic and religious groups of one political culture (Habermas, 2008, pp. 300–303; cf. Habermas, 2009, pp. 124–125). The core of this culture is a constitutional consensus. Groups may not be entitled to religious freedom if they 1) have not abandoned the use of coercion as a tool for implementation

12 This concept of democracy is rooted in Habermas’ theory of discourse, in which communication – geared towards the achievement of a consensus – is one of the basic categories (Kilanowski, 2013, pp. 125–140).

of religious doctrine or 2) use forced indoctrination against their own members (Habermas, 2008, p. 306). Tolerance may not be extended, as Habermas argues convincingly, to groups that are “illiberal” (cf. Habermas, 2008, p. 305), and themselves undermine it.

Concluding remark

The wave of migration which is observed in Europe today presents a difficult case of the encounter with the Other. Such an encounter, which causes fear or influences the formation of stereotypes and prejudices, was described some years ago by Ryszard Kapuściński as follows: “Three possibilities have always stood before man, whenever he has encountered an Other: he could choose war, he could fence himself in behind a wall, or he could start a dialogue. (...) In the myths of many tribes and peoples there is a conviction that only we are human beings – members of our clan, our community – and the Others, all the Others, are subhuman, or are not people at all” (Kapuściński, 2006, p. 47). Both fear, stereotypes and prejudices may adversely affect European standards of religious freedom, causing limits to be placed on it, which can be easily justified by the need to combat fundamentalism and terrorism inspired by religion. At the same time we must remember that these standards can be preserved – as Jürgen Habermas rightly believes – only through the recognition of the principle of reciprocity, of mutual respect for one another’s views by the followers of all religions and believers and unbelievers. Thus, immigrants arriving in Europe – Muslims and other religious believers – in order to enjoy religious freedom, must recognize the need to grant the same freedom to others, and accept a political culture based on pluralism.

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Tug of war for an influence in the South Caucasus: comparative study of the European and Russian approaches.

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Abstract

The South Caucasus is located in the strategically crucial geographical area where the world's leading actors are actively involved. Traditionally, leading powers playing an important role in international relations have diverse interests in and for the region. Over the years, varying interests of the most of these actors coupled together with their contrasting policies to influence the region have triggered — what is usually called — a competition for an influence in the South Caucasus. In the wake of illegal annexation of Crimea by Russian Federation and subsequent war in the Eastern Ukraine, the most fierce competition has started taking place between the European Union (EU) and Russia, which is the main focus of this short paper. This paper traces the root causes of the competition by performing a comparative analysis of the European and Russian approaches in and for the South Caucasus. As a result, the paper comes to the conclusion that the European Union has comparative advantages vis-à-vis Russia for an influence in the South Caucasus. This conclusion is based on five factors some of which are tentative.

Keywords: geopolitics, EU-Russia relations, South Caucasus, Georgia, Azerbaijan, Armenia

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Introduction

The South Caucasus is located at the intersection of leading powers that play a crucial role in world affairs. It is bordering Russia in the North, Turkey in the East, and Iran in the South. Even though they are not sharing land borders, the South Caucasus is often considered to be the immediate neighbourhood of the EU, too. Traditionally, this geographical territory that is home to Armenia, Azerbaijan and Georgia was known as Transcaucasia. As Tishkov and Ivanov observe in the course of changing geopolitical dynamics in order to distance the region countries from Russia, the region started to be referred as the South Caucasus (Tishkov& Ivanov, 1999, p. 4). Despite the fact that three republics constitute the South Caucasus are grouped together due to the long shared history of living together under the Russian Empire and the Soviet Union, they have distinct religious, linguistic, ethnic, cultural and political identities. For this reason, to understand the complexity of the South Caucasus requires a look beyond the small geographical area it is located in.

Armenia, for instance, predominantly Orthodox Christian country, has chosen path to align itself with Russia by becoming a member of the Russian-led Eurasian Economic Union (EEU), an organisation, according to many, established as an alternative to the EU. Armenia is a strategic ally of Russia with whom Yerevan enjoys an advanced level military alliance, as well. In spite of their religious difference, Armenia also has good bilateral relations with Iran, particularly in the trade and energy fields. Relations between Armenia and the EU have witnessed a slowdown following the Yerevan's strategic 'u-turn' from completing the Association Agreements with the EU in favour of joining the EEU in September 2013. Nevertheless, the two has started working on the new framework for cooperation and sides opted to

continue “the political and trade dialogue in areas where this is compatible with Armenia’s new obligations to the EEU”.² Armenia, however, has non-existing relations with Turkey who closed its borders with Armenia in solidarity with Azerbaijan. The two South Caucasus states — Armenia and Azerbaijan have long time enmity over the Nagorno-Karabakh region (internationally recognised territories of Azerbaijan with significant Armenian population). The conflict between the two broke out towards the end of the 1980s lasting six years until the provisional ceasefire agreement signed between the sides in 1994 in Bishkek. Today, despite four United Nations resolutions, documents of the Council of Europe, European Union, and other international and regional bodies all calling for the withdrawal of Armenian forces from the occupied territories, Armenia controls almost 20 per cent of internationally recognised Azerbaijani lands (Nagorno-Karabakh and seven surrounding regions).

Azerbaijan, predominantly Muslim, but secular country, is culturally and ethnically linked to Turkey. Since independence, Azerbaijan has put great efforts to maintain balanced relations between the West and Russia. Even though that Russia often refers to Azerbaijan as its strategic partner (a term that is different from strategic ally), Moscow’s military alliance with Armenia disquiets Azerbaijani leadership. In general, Azerbaijani public opinion is largely against to build close ties with Russia, but Russia’s strong power in the Nagorno-Karabakh conflict significantly reduces Baku’s room to turn away from Moscow. Azerbaijan’s relations with the EU, at times, witness ups and downs, mostly due to the EU’s criticisms over the

² European Union External Action Service, “EU Relations with Armenia”
Available at: http://eeas.europa.eu/armenia/index_en.htm

country's rights records, but also because of the EU's ambiguous position on the Nagorno-Karabakh conflict. In spite of these, EU is the biggest import and export partner of Azerbaijan, and the two is working on the strategic partnership agreement. Azerbaijan's relations with Iran have been problematic, partly because of Azerbaijan's partnership with Israel and Iran's attempts to influence the country through religion. However, the lift of western sanctions has created the impetus for improved relations between Baku and Tehran.

Georgia, also Orthodox Christian is often perceived as the most reform-oriented country in the South Caucasus. For years, Georgia has been considering Russia responsible for its two breakaway regions — South Ossetia and Abkhazia. When a brief war erupted in 2008 between Russian-backed separatists and Georgia, the Russian military was also directly involved in the conflict, which resulted with the relations between the two to hit the lowest. Nevertheless, in the recent years, Georgian government seems to be willing to improve its relations with Moscow. Despite this willingness, Georgia remains pro-West and is, in fact, the frontrunner of the EU integration who has concluded the Association Agreements including Deep and Comprehensive Free Trade Agreement with the EU. Georgia currently enjoys a free access to the EU single market. In addition, European Commission has recommended a visa-free travel for Georgian citizens to the Schengen zone as the latter has successfully implemented the necessary conditions. It is also often discussed that given the country's level of commitment to the EU integration, the EU should offer Georgia a possibility of EU accession.

Having said that it is also clear that presently, political, security, foreign policy and economic outlooks of each state and the region, in

general, are largely influenced by relationships between the regional states themselves and existing conflicts in the region. Besides, diverse interests of the other big powers in and for the South Caucasus also play a crucial role in the changing geopolitical dynamics in the region. For this reason, to understand the complexity of the South Caucasus requires a look beyond the small geographical area it is located in.

Diverse interests of all the external players coupled together with different policies to influence the region have over the years triggered competition for the influence in the South Caucasus. However, observations and evidence suggest that the most intense competition takes place between the EU and Russia.

EU vs. Russia in the South Caucasus

At the start, the EU's involvement in the region was perceived by Russia as purely economic (trade relations, financial and technological support and etc.). Therefore, Moscow was not particularly concerned of the EU as a potential competing power for a political influence in the region. In the course of a time, this approach of Russia has changed as the EU increased cooperation with the regional countries and they started seeing the EU integration as an 'escape' from Russian influence. In turn, Russia started perceiving the EU's increasing influence in the region as a Western geopolitical strategy calculated against Russia in order to undermine its national security. As a result, the new millennium witnessed rather tense relations and since then the competition between the EU and Russia over the influence in the shared vicinity has gradually become obvious. As this confrontation grows, countries in the South Caucasus feel pressure to choose between two competing projects — the Eastern Partnership (EaP) or the EEU. In this respect, both, Brussels

and Moscow employ different strategies to attract Armenia, Azerbaijan and Georgia to their respective projects: the EU counts on the power of attraction, whilst observations and evidence suggest that Russia increasingly relies on assertive measures to diminish the EaP and discourage countries from pursuing the EU integration, and instead pressure them into the EEU integration.

There are two possible explanations for Russian perception of the EU's growing influence in the region as a threat to its national security. First, Russia considers former Soviet space (except for Baltic states) as its own 'traditional sphere of influence' and thus Russia constantly looks for ways to retain the influence over South Caucasus states' domestic and foreign policies. Growing political influence of the EU in the region challenges Russian monopoly. Secondly, according to Moscow, once countries move closer to the EU, they increase chances to enter to the NATO, an organization that was established to counter the Soviet Union. Therefore, preventing these countries from entering the 'European club' serves the interests of Russia's national security.

Real life evidence suggests that in order to achieve foreign policy objectives of retaining control over the South Caucasus states and 'pushing out' the EU from the region, Russia largely uses its material resources as hard power tools to exploit the vulnerabilities of these countries. In addition, Russia offers economic and military benefits such as long term loans or military aid. In moments when offered benefits prove to be not sufficient in order to get what it wants, Russia may use assertive tactics such as military action, deportation of migrants, trade embargo and etc. Besides, in the recent time, Putin administration has been putting great efforts to increase Russia's influence through soft power by launching Russian-owned media

channels in local languages, financing pro-Kremlin NGOs, political parties and etc. In the recent years, Russian state-owned companies have intensified acquisition of large companies from some of these states. This way, Moscow effectively controls key sectors of the states, which leave the respective leaderships vulnerable on Russia.

As for the EU, observations suggest that the EU considers the South Caucasus worth to compete for a number of reasons. First, despite being a small region, the South Caucasus has a strategically crucial geographical location, which has the potential to be a suitable transit corridor between Europe and Asia. In this regard, the EU values the development of an export-important corridor between east and west through the South Caucasus. In this regard, the EU has a particular interest to keep the South Caucasus independent from any external pressure or control. Therefore, the EU has prioritized the establishment of a trade corridor that would bypass Russia's control over it. Secondly, South Caucasus is also home for rich Caspian-based hydrocarbon resources, which is crucial for the EU for its energy security. This interest of the EU was significantly increased since 2006 when it became clear that Russia is using the energy as a political tool in its relations with the EU. The EU found itself in a vulnerable position and thus now, working with the neighbouring countries on energy security has become a pressing necessity. In such a way that the EU is no longer willing to depend solely on Russian energy supply. As a result, it has been putting efforts to develop an alternative energy supply sources and routes that would reduce EU's energy dependency on Russia. In order to guarantee an energy diversification, the energy resources of Azerbaijan are of significant importance for the EU — one of the world's largest energy consumers. In this respect, the SGC is the main component of the

EU's energy security strategy. The project envisages transportation of natural gas of Azerbaijan from the Caspian basin to Europe through Georgia and Turkey. In the future, the South Gas Corridor can be used to transport energy resources of Kazakhstan and Turkmenistan to Europe as well. The EU's energy interest could be observed in all the documents that were concluded with the South Caucasus countries as they all include some provisions on energy issues.

Besides its attractiveness, fragile status-quo and instability exist in the South Caucasus that create security challenges for powers like the EU, Iran, Russia and Turkey. Instability and security challenges emerged from the region can have a direct impact on the EU. This is another reason behind the EU desire to gain an influence in the region so it can control the security and stability.

As previously mentioned, in order to achieve its objectives, the EU mostly relies on its power of attraction to persuade countries into the European path under the EaP. Through the EaP, the EU often uses 'political conditionality', which refers to the practice of making implementation of agreements, cooperation and assistance dependent on certain conditions being met. The EU employs positive or negative conditionality. In the case of positive conditionality, Brussels uses what many calls 'carrots'. For instance, the EU can offer a partner country a free access to its single market or visa-free travel to the Schengen zone, if certain reforms and conditions are implemented by the partner countries. On the other hand, the EU can employ restrictive instruments as part of its negative conditionality such as cutting financial aid assistance, imposing financial sanctions and etc.

Though, the EU's approach towards the South Caucasus is not without its limitations and challenges. The list of challenges to the effectiveness of the EU policy towards the region is long and the EU must address them if it wishes to maintain an influence in the region. One can contextualise inter-related challenges in three categories. First of these challenges is the EU's lack of direct involvement in the Nagorno-Karabakh conflict resolution process, which poses the biggest security and stability threat to the region and directly to the EU. Second of them is normative vs utilitarian dilemma before the EU. In such a way that there is an ambiguity in Brussels' approach towards democracy and human rights advocacy when it comes to the business or geopolitical interests. The third challenge derives from the external factors. As mentioned before, Russia, who sees the EU as a competing power for an influential role in the region, does not refrain using assertive tactics in order to block their EU integration. Countries such as Georgia that commit a deep integration into the EU, are being target of Russian security, political and economic pressure. The EU's lack of a political will and military strength to give a security guarantee for the partner countries in case of an external military threat is the third challenge.

Despite all the challenges and flows, public polls results suggest that the South Caucasus populations would not wish to see the EU to lessen its level of engagement in the region. On the contrary, the EU is highly appreciated player in the region and many would favour seeing increased EU involvement in the region with the more effective EU policies. That brings me to the main conclusion that the EU has comparative advantages vis-a-vis Russia for an influential role in the South Caucasus. This conclusion is based on a number of fact-based factors.

Why does the EU likely to win the competition?

At first appearance it might look like Russia is ahead of the EU of an influence in the South Caucasus, especially given Armenia's last minute unexpected decision to abandon to sign the Association Agreements with the EU in favour of joining the EEU. Nevertheless, such observation is largely misguided, if to take into considerations number of factors.

In 2014, Russia initiated the Eurasian Economic Union as a counter-model of the EU. For the time being, the EEU is systemically weak to emerge as an alternative to the EU. The evidence shows that it brings more economic difficulties to its member states than economic and social prosperity. For instance, the EEU membership presents very few economic benefits for Armenia as it is not sharing borders with any members of the EEU. On the contrary, under the EEU, Armenia is required to increase tariff rate that would discourage foreign investment in the country. Also, evidence suggest that some countries become part of the EEU because of Russian pressure rather than its attractiveness. When it is the case the EEU is hard to be a successful project in the long-run and thus, it can hardly compete with the EU.

In the twenty-first century, politics has taken a form of a competition where global players compete for attractiveness, legitimacy and credibility. In such a way that, an international actor (EU or Russia) may best achieve the outcomes it wants if it's values and system of governance are admired beyond its borders. In this respect, argue that Russian approach lacks a legitimacy because Moscow tends to only cooperate with local elites. On the contrary, the EU approach primarily aims to develop long-term relations with different

stakeholders including civil society and opposition. So, the EU wins the legitimacy and credibility in the South Caucasus.

Security considerations of states is another important factor where the advantage clearly lies with the EU. Countries always perform cost-benefit security analysis before aligning themselves with any power centres. In this respect, it is clear that the EU does not pose any security threats to any these states. Whereas, Russia is perceived as a potential threat by Georgia and Azerbaijan to their territorial integrity. This perception has heightened especially in the aftermath of the Ukrainian crisis. As Stephen Blank rightfully observed, “Today the invasion of Ukraine and annexation of Crimea confirm that the Putin regime openly believes that its system can only survive if Russia is an empire, a situation that *ab ovo* puts the sovereignty and integrity of other CIS members at risk” (Blank, 2014, p. 18).

Armenia, on the other hand, perceives a security threat not directly from Russia, but indirectly due to the growing tension between Ankara and Moscow. Recently, Russia has put its troops in Armenia on alert for a possible military confrontation with Turkey. Such possibility is also acknowledged by the Russian ambassador to Armenia, Ivan Volynkin, who has been quoted saying that in the case of an armed conflict Russia may consider using the 102nd base in Gyumri against Turkey. This statement, in turn, was received with particular concern among some Armenian analysts as such scenario would put Armenia in an insecure position. According to Armen Grigoryan, “Armenia’s strong dependence on Russia has now become not only a source of the democratic deficit as well as of economic and demographic problems, but also a security threat to Armenia, as regional risks continue to grow” (Grigoryan, 2016).

Last but not least, EU has an advantage vis-a-vis Russia because regional countries have far more trade interests from the EU than Russia. The total trade of the South Caucasus with the EU is at least seven times more than their trade with Russia. Just to give an example, Armenia is the member of the EEU and the trade between them is exempt from any tariffs, but still the EU slightly bigger trade exchange with Armenia than Russia does. Taking this into consideration, one can conclude that trade is an important impetus for the South Caucasus states to come closer with the EU than with Russia.

Conclusion

This paper discussed the two different foreign policy approaches developed by the EU and Russia towards the region in their common neighbourhood. The paper briefly presented the background of the nature of the competition among these power centres for better influence in the South Caucasus. Throughout the paper, it became clear that both the EU and Russia consider their shared vicinity as vitally important for each of their security. Thus, they developed policies with the aim to minimize the potential security threats coming from the South Caucasus. But, they both have mutually exclusive strategies and they both believe that best way to achieve the own security is to keep the regional countries under their sphere of own influence. Vado Amaro Dias argues that the logic of competition took such a form that Moscow considers the commitment of the regional countries to the EU integration as a political loss (Dias, 2013). In a similar way, increasing Russian influence in the region is seen by the EU as the 'constraining effect over the EU's leverage in the region' (Dias, 2013, pp. 256-271). A number of authors even argue that differences between the EU and

Russia is not only based on varying policies but rather there are ideological differences (Larivé&Kanet, 2013, p. 125).

Indeed, Russia considers the South Caucasus vitally important for its national security, thus sees this competition as a zero-sum game. It is mainly because Kremlin considers that the EU integration is a path that leads to the NATO membership. On the other hand, the EU through the ENP/EaP continues to provide a platform for the EU and the South Caucasus countries to strengthen their relations. It seems the EU acknowledges the necessity to offer clear advantages for the 'frontrunner' countries as the European Commission recommended visa-free travel to the Schengen zone for Georgian citizens.³ The main argument of this paper was to reason why does the EU have a comparative advantage vis-a-vis Russia for an influential role in the South Caucasus. In this regards, based on foreign policy and geopolitical analyses, the paper specified four factors arguing for the above-mentioned hypothesis.

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Towards the participatory governance in the Polish-German-Czech borderland - the case of e-office in the Small Triangle towns

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Abstract:

Local authorities more and more often decide upon the implementing of e-governance concept due to facing the necessity for combining the contradictory expectations and need of citizens and having at their disposal the access to ICT. The main aim of the article is to answer the question whether, and if so, in what ways the authorities of the three towns: Bogatynia, Zittau, and Hrádek nad Nisou implement the idea of e-office. The content analysis of the official websites of the towns in question as well as the website of the union 'Small Triangle' (Pol. 'Mały Trójkąt') which they form will allow the author to assess to what extent the functioning of e-office realises the concept of e-participatory governance in the Polish-German-Czech borderland. The instruments typical for the functioning of e-office (including social media) will constitute the main criterion of the websites analysis.

Keywords: participatory governance, ICT, e-office, local administration, cross-border cooperation

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Introduction

The aspiration for the effective execution of public duties prompts local government units to modify their mechanisms of functioning. The transformations seem to be fully reflected when adopting the concept of local governance which replaces a traditional approach of local government and broadens the range of units involved in the process of programming and implementing the actions initially reserved only for public authorities. The key role is played by the members of local communities (internal stakeholders) who, besides many other units, become the partners of authorities chosen in elections. According to new approach (cf. Wiszniowski, 2015, pp. 28-31), the inclusion of citizens in the process of programming and implementing actions is governed by a few conditions (see: Wiesel, Modell, 2014, p. 178). One of them is guaranteeing set mechanisms of expressing their expectations and needs.

The dynamic development of the mechanisms of participatory governance at the local level would not be possible without the use of information and communication technology (ICT)². The technology, due to many factors such as increasing accessibility and relatively low costs of use, enables one to accurately identify the expectations and needs of citizens. Especially while taking into account the main aim of the function of local government units, namely guaranteeing the best possible conditions for the development of a local community. Local authorities more and more often decide upon the implementing of e-governance concept due to

2 Information and Communication Technology (ICT) may be defined in both ways. First, narrow understanding treats ICT as technologies which gather, process and send information in an electronic (digital) form. Broader understanding views ICT as all technologies, including analog ones. The author of the article will use the first, narrow understanding of ICT. Moreover, ICT will be equated in the paper with using the Internet, Nowak 2011, pp. 20-21.

facing the necessity for combining the contradictory expectations and need of citizens and having at their disposal the access to ICT.

The main aim of the article is to answer the question whether, and if so, in what ways (using what instruments) the authorities of the three towns: Bogatynia, Zittau and Hrádek nad Nisou implement the idea of e-office. The content analysis of the official websites of the towns in question as well as the website of the union 'Small Triangle' (Pol. '*Mały Trójkąt*') which they form will allow the author to assess to what extent the functioning of e-office realises the concept of e-participatory governance at local level. It will be vital to answer the question whether and, if so, in what way e-office enables citizens to, on the one hand, obtain the information concerning local issues and, on the other hand, to express their expectations and needs, which is perceived as a constituent of participatory e-governance.

The choice of Bogatynia, Zittau and Hrádek nad Nisou has been given careful consideration and proves to be justified. All the three units of local government are located in the area of Polish-German-Czech borderland and are the members of the union 'Small Triangle'. They are therefore connected by the experience of cross-border cooperation and, hence, the necessity to satisfy various expectations and needs. Especially while taking into account the actions in which Polish, German and Czech community is involved. In this case the importance of participatory governance, realised with the use of e-office, is especially crucial.

Methodology and paper structure

The author of the article will use several but closely related research methods. The key role will be played by three of them. First, referred to as case study, bases on the multifactor analysis of a given problem or phenomenon. Its usefulness and research value result from the

fact that the conclusions drawn on the basis of the analysis of an individual case may be used in other cases with similar conditions and circumstances (Lee, 1989, p. 118). The second, referred to as a comparative one, will be used to prepare the compilation and comparison of the official websites of Bogatynia, Zittau and Hrádek nad Nisou administered by the employees of municipal offices. In a further part, it will allow one to compare the websites with the website of the union 'Small Triangle'. The third applied method will be content analysis. The method will be used to determine the most important similarities and differences between all the above-mentioned websites. The instruments typical for the functioning of e-office will constitute the main criterion of the analysis. The analysis of chosen messages and information presented via the four websites (as well as the social media connected to these websites) in question will be equally important.

The article will consist of two main parts: theoretical and practical. In the first part the author will elaborate on the connection between the use of ICT and the realisation of the idea of participatory governance at local level. The second part of the article will comprise the presentation of the results of the empirical analysis of the four above-mentioned websites. Some chosen statistical data and the documents concerning the functioning of Bogatynia, Zittau and Hrádek nad Nisou will complete the article.

Participatory e-governance

The theoretical frames for the analysis of the functional shift from government to governance at local level (see: Geabler & Osborne, 2005, p. 64; Łukomska-Szarek, 2014, p. 138) are formed by the neo-institutional approach according to which a local political system is 'a network of norms, behaviours and interactions connected with

gaining the right to make binding decisions concerning the allocation of goods and burdens, as well as being responsible for the decisions' (Antoszewski, 2014, p. 37). The dynamics of the functioning of the system is therefore determined not only by authorities chosen during elections but also, besides other groups of stakeholders, the members of local communities. They gain the opportunity to take part in the process of programming and implementing various actions by expressing their support or disapproval for the dimensions of local policy and, hence, have the right to "judge" local authorities.

The functioning of a local political system assumes the satisfaction of the range of expectations and needs, both individual and collective ones. Apart from the need for safety, identity, autonomy, representation and domination, the need for participation plays a crucial role (Antoszewski, 2014, pp. 37-34). Adopting the philosophy of participatory governance allows the satisfaction of the needs.

The shift from a traditional approach is a result of a range of various but related factors, both external and internal ones. In relation to external factors, dynamic changes connected with the process of globalisation and Europeanisation are significant. When it comes to internal factors, one should emphasise the importance of the ongoing decentralisation of a decision-making process and the development of the cooperation mechanisms between public and private sectors (Herbut, 2014, p. 17). Furthermore, the awareness of the increasing expectations and needs of citizens which more and more often accompanies the actions of public authorities is also important.

Participatory governance more and more often becomes e-governance due to the aspiration to, on the one hand, effective execution of public duties and, on the other hand, rationalisation of the costs connected with it. Apart from the changes observed in

relation to local authorities and offices subordinated to them, an important role is also played by the dynamic social transformations which are accurately described with a term information society. According to Manuel Castells, the term refers to 'the attribute of a specific form of social organisation in which producing, processing and transferring information become the fundamental source of the productiveness of authority due to new technical conditions' (2007, p. 36). Therefore due to the development of ICT information is not only a constitutive element of the functioning of contemporary societies but its gathering, processing and sending become the condition of identification and, hence, satisfaction of social expectations and needs.

The review of extensive literature shows that e-governance can be understood in two ways. The narrow understanding treats e-governance as a mechanism based on the use of ICT (mostly the Internet) which provides the access to public information to citizens. According to the broad understanding, e-governance is fitted in the broader context of the communication process of public administration, including local government units, with surroundings. It makes, therefore, administration take a new organisational form (see: Haręża, 2011, pp. 27-28). The essence of its functioning is conditioned therefore not by the access to public information but the fact of guaranteeing set mechanisms of governing (co-deciding and cooperating) based on ICT. Therefore, it is not only about ensuring the new quality of providing public services but including various groups of stakeholders, including citizens, in the process of governance (Biernacka-Ligięza, 2011, p. 284).

For the article one assumes that the functioning of e-office can fit the second, broader understanding. Especially while assuming that the skilful use of ICT enables the members of local community to, first,

not only obtain but also exchange information concerning public issues, second, express their own expectations and needs and, third, take part in the process of programming and implementing actions.

Bogatynia, Zittau and Hrádek nad Nisou - dimensions of diversity

Due to the location in the area of Polish-German-Czech borderland, the cooperation within the union 'Small Triangle' strengthens relations with local communities consistently developed after 1989. The formal and legal basis of the trilateral contacts is formed by the contract from 9th November 2001 concerning the cooperation of the cities, agreed and adopted by local authorities (Bogatynia, 2016). The union 'Small Triangle' is not, however, the only form of the cooperation of local government units. As Table 1 presents, the towns are linked by the experiences of the bi- and trilateral cooperation of the so-called partner towns. What is more, Bogatynia, Zittau and Hrádek nad Nisou are the members of Nysa Euroregion.

Table 1. The forms of cross-border cooperation of Bogatynia, Zittau and Hrádek nad Nisou

Cooperation form/town	Bogatynia	Zittau	Hrádek nad Nisou
Partner town	<ul style="list-style-type: none"> - Gródek nad Nysą - Zittau - Zgorzelec 	<ul style="list-style-type: none"> - Bogatynia - Liberec - Pistoia - Villingen-Schwenningen - Portsmouth - Hrádek nad Nisou 	<ul style="list-style-type: none"> - Bogatynia - Zittau

Euroregion	- Nysa	- Neisse	- Nisa
Union	- Small Triangle (Pol. <i>Mały Trójkąt</i>)	- Small Triangle (Ger. <i>Kleines Dreieck</i>) - Six Cities Union (Ger. <i>Sechsstädtebund</i>)	- Small Triangle (Cze. <i>Malý trojúhelník</i>)

Source: Bogatynia, 2016a; Zittau, 2016; Hrádek nad Nisou, 2016.

As a result of the cross-border location of Bogatynia, Zittau and Hrádek nad Nisou, the cooperation of the three cities encompasses various but related areas of urban policy³. In spite of the fact that the key role is played by infrastructure investments (concerning the development of road and railway infrastructure), the aim of the functioning of the union 'Small Triangle' is also to realise the cultural, educational and sport enterprises (Mały Trójkąt, 2016).

Although Bogatynia, Zittau and Hrádek nad Nisou are located nearly in direct neighbourhood, they are the cities functioning in the three different systems of local government based on different institutional and legal solutions and, what is more, have different development potential (see: Table 2).

³ Urban policy, treated as a sphere of activity of public and private units at local but also regional, national and international level, integrates the undertakings realised in various but closely related sectors.

Table 2. Bogatyna, Zittau and Hrádek nad Nisou - chosen dimensions of functioning

Category/Town	Bogatynia	Zittau	Hrádek nad Nisou
Area (km ²)	136,17	66,74	48,54
Population	19 105	26 759	7 642
Formal and administrative status	town (located in Zgorzelec district, Lower Silesia province)	town (located in Görlitz district, Saxony)	town (located in Liberec district, Liberec region)
School system	primary schools secondary schools	primary schools secondary schools higher schools	primary schools secondary schools
Economy (main sectors)	services	services tourism	services
Main religion	Catholicism	Eastern Orthodoxy	Atheism

Source: Bogatynia, 2016b; Zittau, 2016a; Hrádek nad Nisou, 2016a.

Local authorities therefore face the challenge to identify the expectations and needs of citizens of the town they govern but also the citizens of other local government units belonging to the union 'Small Triangle'. In this sense, the process of programming and implementing public services encompasses internally varied community. It is determined not only by the historically conditioned difference between the personal experiences of its members. The fact

that all the citizens of Bogatynia, Zittau and Hrádek nad Nisou, treated as a whole, create multi-religious and multicultural community is vital as well.

E-office at the Polish-German-Czech borderland

As the result of the development of ICT, including the rising popularity of the Internet, it is commonly used in the functioning of local government units. The Internet is therefore used in the process of the internal as well as external communication of the offices of communes (Pol. *gmina*), towns/cities, districts (Pol. *powiat*) and provinces (Pol. *województwo*). In the first case (internal communication) the Internet serves as a means of exchanging information in an office itself. Whereas in the second case (external communication) it is an element of the communication process of an office (authorities as well as the office workers at particular organisational sections) with surroundings (see: Table 3).

As the compilation presents, the use of the Internet may have a multi-dimension character. The Internet, treated as the component of external communications, combines the actions of various aims and character. On the one hand, it allows to shape a positive, desirable image of a local government unit (then we talk about marketing activity conducted via the Internet), on the other hand, it enables the realisation of the tasks typical of e-office.

Table 3. The Internet in the communication of the offices of local government units

Communication			
Internal		External	
Receivers	Aim	Receivers	Aim
<ul style="list-style-type: none"> - authorities - office workers 	exchange of the information concerning: <ul style="list-style-type: none"> - functioning of an office, - matters coming under the remit of authorities and office workers 	<ul style="list-style-type: none"> - external stakeholders (such as entrepreneurs, tourists, students, central institutions) 	<ul style="list-style-type: none"> - creating the image of a local government unit (place marketing)
		<ul style="list-style-type: none"> - internal stakeholders (citizens/voters) 	e-office: <ul style="list-style-type: none"> - shaping the sense of identification of the citizens with a local government unit, authorities, an office, - creating a mechanism enabling citizens to express their expectations and needs

Source: author's own compilation.

The functioning of e-office is connected with the use of specific instruments. Although there is a range of factors that determine which instruments should be applied, the key role is usually played,

first, by their popularity and, second, by simplicity, some kind of intuitive, ease of use. Obviously, the functioning of e-office does not mean that the authorities of the three towns in question do not use the traditional mechanism of governance⁴. Especially as they allow citizens to express their expectations and needs.

Table 4 illustrates the extent of the use of the six chosen instruments. Undoubtedly the official websites of the three towns in question: <http://bogatynia.pl>, www.zittau.de and www.hradek.eu are of basic importance.

Table 4. The instruments of Bogatynia, Zittau and Hrádek nad Nisou e-office

Instrument/ town	Bogatynia	Zittau	Hrádek nad Nisou
Official website	yes	yes	yes
Electronic inbox (petitions, complaints, application forms)	yes	yes	yes
Settling a matter/ date reservation	no	no	no
Application forms	yes	yes	yes
Newsletter	yes/no	no	no
Social media	yes	yes	yes

Source: author's own compilation on the basis of: Bogatynia, 2016c; Zittau, 2016b; Hrádek nad Nisou, 2016b. As at 10th of March 2016.

4 The restrictions connected with conducting 1) public consultations, 2) public meetings, 3) voting concerning civic budgets obviously differ in each of the towns in question. The differences result from the different legal order of Poland, Germany and the Czech Republic and, hence, the regulations concerning the functioning of local government units. The analysis of the aims and extent of using the three traditional mechanisms of participatory governance is not, however, considered by the author of the article.

Table 4 shows that in spite of the fact that each town has at its disposal a website administered and updated by office workers, other instruments are used to various extent. While the citizens of Bogatynia, Zittau and Hrádek nad Nisou have the opportunity to make use of electronic inbox and download certain application forms, they do not have the chance to settle their matters online. The analysed websites also do not enable citizens to reserve the date of the meeting with the representatives of local authorities or office employees. Only one town, Bogatynia, prepares an up-to-date newsletter. However, it does not have a common form based on information send via e-mail. The Bogatynia newsletter uses SMS. What seems to be crucial is the fact that all the three towns communicate with citizens via social media.

The analysis of the data presented in Table 5 requires some remarks. First, the author using a term social media refers to all Web 2.0-based services which allows individuals to freely communicate with other network users, including the exchange of messages in the form of a text or audiovisual broadcasting basing on official accounts/profiles (Boyd & Ellison, 2007, p. 211). Second, it is not the analysis of all the social media used by local government units. The links put at the official websites (at a homepage or a subpage) was the main criterion for choosing the seven social media (Facebook, Twitter, YouTube, Instagram, Google+, Zonerama, Soundcloud). Third, not all the towns in question decided upon putting such links at their websites. In such cases, the choice to include a social medium in the compilation was the result of the author's search for the official profiles of the towns via Google browser.

Table 5. Social media as the instruments of Bogatynia, Zittau and Hrádek nad Nisou e-office

Social medium/ town	Zittau	Bogatynia	Hrádek nad Nisou
Facebook	yes	yes	yes
Twitter	yes	yes	yes
YouTube	no	no	yes
Instagram	no	no	no
Google+	no	no	yes
Zonerama	no	no	yes
Soundcloud	no	no	yes

Source: author's own compilation on the basis of: Bogatynia, 2016c; Zittau, 2016b; Hrádek nad Nisou, 2016b. As at 10th of March 2016.

As results from Table 5, the social media used by all the towns are Facebook and Twitter. Hrádek nad Nisou is an undisputed leader as it communicates with citizens via six social media. It is difficult to unequivocally give the reason for such a situation. One may try to explain it by bigger or smaller popularity of a given medium in certain countries (e.g. relatively small popularity of Zonerama in Poland) or by the necessity to engage certain human or organisational resources (e.g. for the preparation of a film at YouTube).

The analysis of the official profiles of Bogatynia, Zittau and Hrádek nad Nisou at Facebook allows one to determine which areas of urban policy and its realised projects mostly engage citizens. In other words, which of them are the subject of the discussion and comments of the members of local communities⁵.

⁵ The analysis of the profiles at Facebook encompasses the period from the beginning of the current tenure of local government authorities (councils) of Bogatynia, Zittau and Hrádek nad Nisou to 10th March 2016.

Table 6. The areas of urban policy of Bogatynia, Zittau and Hrádek nad Nisou presented via Facebook

Area of urban policy/town	Bogatynia		Zittau		Hrádek nad Nisou	
	comm ents	likes	comm ents	likes	comme nts	likes
Education	2	28	-	-	-	-
Labour market	-	-	-	8	-	16
Transport and infrastructure	1	9	98	857	2	71
Energy	-	-	-	-	-	-
Municipal waste	1	9	-	-	-	-
Green areas/recreation	-	-	18	169	1	15
Health	-	17	-	-	-	-
TOTAL	4	63	116	1034	3	102

Source: author's own compilation on the basis of: Facebook, 2016; Facebook, 2016a; Facebook, 2016b. As at 10th of March 2016.

The comments and likes presented in Table 6 have an accumulated value for all the projects in the particular areas of urban policy. The presented above compilation takes into account only the so-called hard projects which realisation influences or will influence in measurable manner the functioning of local communities. The majority of the cases concern infrastructure projects (realised or planned) or legal solutions (decisions of local authorities). Assigning

the projects to the certain areas of urban policy results from the classification of Tom Blackmann (2003, pp. 197-280), which has been already applied by the author of the article, in different context, for other analysis (Glinka, 2015, pp. 55-56).

As results from the compilation, the area which mostly capture the attention of the citizens of all three towns is transport and infrastructure. It can be clearly visible in the accumulated number of 101 comments and 937 likes. The second aspect is green areas and recreation, 19 comments and 184 likes, respectively. The comparison of the three towns shows that the citizens of Zittau discuss mostly the issues concerning their town. Such a conclusion can be drawn on the basis of 116 comments and 1034 likes.

Due to the cooperation within the union 'Small Triangle' the authorities of Bogatynia, Zittau and Hrádek nad Nisou decided upon creating its official website. It is run in three languages (Polish, German and Czech) and presents many information concerning not only the aims and structure of the union 'Small Triangle' but also the trilateral projects realised in the particular areas of urban policy.

Table 7. The instruments of e-office of the town union 'Small Triangle'

Instrument	Use
Official website	yes
Electronic inbox (petitions, complaints, application forms)	no
Settling a matter/date reservation	no
Application forms	yes
Newsletter	no
Social media	no

Source: author's own compilation on the basis of: Mały Trójkąt, 2016. As at 10th of March 2016.

As Table 7 presents, the website do not use, however, the instruments typical of the functioning of e-office. In contrast to the official websites of the cooperating towns, the union also do not communicate with citizens via any social medium.

Conclusion

The contemporarily observed, dynamic changes in the functioning of local government units result in including the citizens in the process of deciding upon local issues. Striving for the effective and efficient execution of public duties, the authorities of communes, towns/cities, districts and provinces create the mechanisms expressing the collective expectations and needs. The development of ITC, including the Internet, makes that e-office plays this role more and more often. The analysis of the content of the official websites, on the one hand, of Bogatynia, Zittau and Hrádek nad Nisou and, on the other hand, of the union 'Small Triangle' allows one to draw some basic conclusions.

First, the towns use only the selected instruments typical for the functioning of e-office. They do not provide the possibility of settling a particular matter online. What is more, the citizens of Bogatynia, Zittau and Hrádek nad Nisou are not able to reserve in this way the date of the meeting with a local government representative or an office worker. Each town uses, at least, two popular types of social media (Facebook and Twitter), which administrated by office workers, play a more and more important role in the communication with citizens.

Second, while the towns, treated as the local government units independent of each other, use the tools of e-office, the idea of e-office functioning has not been implemented by the union 'Small Triangle'. The cooperating with each other: Bogatynia, Zittau and

Hrádek nad Nisou only decided to launch an official website. Thus, the compilation and comparison of the scope of implementing the e-office idea at the level of individual local government units and cross-border cooperation clearly shows that in the second case it does not create the mechanisms of participatory e-governance. It is difficult to clearly identify the cause of this state of affairs. A certain role can be played by the weakness of institutional and legal mechanisms of cooperation on the borderland. This issue certainly requires further, in-depth research on a wider scale.

Third, social media are the instrument which not only engage, to the greatest extent, the attention of citizens but also is used by all the towns in question. Their role in the process of participatory e-governance is special. Based on Web 2.0 technology they allow for the unfettered exchange of information between the employees of city councils and the members of a local community. The flow of information, as opposed to the official website and the newsletter, has therefore a bi-directional nature. As shown on the example of Facebook, the use of social media allows the local authorities to initiate and moderate the discussion devoted to the problems of the citizens concerning different areas of urban policy. Among them the exchange of arguments devoted to transport and infrastructure as well as green areas and recreation, is dominant. What is more, Facebook is a mechanism for expressing the expectations and needs of local commune members. The analysis of the official profiles of Bogatynia, Zittau and Hrádek nad Nisou leads to the conclusion that social media fully fit in with the process of participatory e-governance. In this sense, it may be accompanied by the traditional, institutionalised mechanisms of participatory e-governance.

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