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## EUROPEANIZATION: A CRITICAL REALIST, DISCURSIVE INSTITUTIONALIST APPROACH

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**Abstract:** *In the field of European Studies once so popular new institutionalist approaches are struggling to compete with the theoretical innovations proposed by post-structuralist scholarships. These latter interpretations debate that ‘grand narratives’ are proper explanatory frameworks to understand different political, economic and social processes merged under the umbrella-notion of Europeanization, so they favor more agent-based conceptualizations. While New Institutionalism aims to reflect on this challenge through epistemological and methodological attempts, mostly by discursive manners, yet this paper – with respect to the achievements of new empirical set-ups and designs – argues that the ontological background should be addressed instead. For this goal the perspective of Critical Realism is crucial to note, and its suggestions about 1) multi-layered social reality, 2) meta-theory, and 3) interconnectedness of subjects and objects in social science are pillars to be considered. All of these potential contributions highlight that scholars need to be reflexive as they are existentially embedded into the deep structures and linkages of generative mechanisms that they are theorizing. The more stable the belief that certain ontological conceptualizations are grasping the observable facts and events in a reflective way, the less reflexive the given thinker to realize the need for out-of-the-box ideas and hypotheses.*

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**Keywords:** Europeanization, Institutionalism, Structuralism, Critical Realism, Agency, Discourses.

### Introduction

New institutionalist approaches, both in a theoretical and empirical sense, dominated studies on Europeanization during the early 2000s. At this time to conceptualize the interrelations between supranational and national level institutions and actors was appreciated by scholars with

different backgrounds, just as to tackle empirically the same relationship. Beside the scientific importance, these studies, as policy researches, contributed to the assessment of multi-level governance practices and to the formulation of strategies and action plans too. Institutional, mostly comparative investigations on the progression (or stagnation) of Europeanization of different sectors and policy areas are still highly welcomed by decision-makers (take a look at the calls of EU's or national research funds), yet the innovation of original theoretical arguments has somehow slowed down. To be more precise, there is a shift to post-structuralist conceptualizations about Europeanization, and this is strongly challenging New Institutionalism, both its ontological aspects and its epistemological explanations (cf.: Neuman-Stanivukovic, 2014).

This paper aims to reflect on this trend – from a reframed but still institutionalist perspective. At first, it invokes Critical Realism as a conceptual source to shed light on how the structuralist rigidity of institutionalist approaches on Europeanization could be enriched through reflexivity; and secondly, it offers Discursive Institutionalism as a possibly adequate contribution to this goal. The main argument of the paper is divided into four chapters. The first gives an overview on the roots of New Institutionalism in European Studies, on how the concept was emerging in early European integration theories and then how it influenced studies on Europeanization particularly. The second chapter continues on this path, insofar as it presents some main institutionalist conceptualizations on Europeanization by shortly describing frameworks from Tanja Börzel, Claudio M. Radaelli and Thomas Risse. The third chapter then gives a short introduction to Critical Realism by highlighting its main aspects with particular focus on multi-layered reality, meta-theory and interdependency between subjects and objects of social science. Finally, the fourth chapter suggests that Discursive Institutionalism could be a contribution that, by reflecting on the critical realist perspective, may enrich institutionalist studies on Europeanization through a reflexive stance.

### **The roots of institutionalist approaches on Europeanization**

Early studies on European integration generally concern three main theoretical approaches: Federalism-confederalism, Neo-functionalism and Inter-governmentalism (Cini, 2007a). There is a trend among these conceptualizations, namely a continuous shift from supranational level processes to national level impacts on formulation of integration policies (Grunhut, 2017). Federalism-confederalism is based on normative constructivist arguments which highlight the



importance of establishing organizations, adopting regulations, elaborating strategies, frameworks and actions plans, and introducing standardized procedures at the supranational level, while supporting a multi-cultural and multi-linguistic 'European togetherness' as a shared identity (Burgess, 2007). Although both within the federalist and the confederalist argumentations it is possible to differentiate rather centralist interpretations which are tempted to prioritize the supranational level and more decentralist tendencies that highlight the governmental functions of nation-states, yet these theories generally accept that the integration is a beneficial progression, so to facilitate its prospective advantages is a common interest for all parties (Burgess, 2000).

Neo-functionalism roots back to the concept of Ernst B. Haas (1958, 1961). In brief, theories based on this background underline how different supranational level processes, even just through their practical progression, without specific shifts to intentionally deepening the integration, support the stabilization and expansion of supranational cooperation. For this approach 1) integration spillover-impacts, 2) socialization of the elites, and 3) the roles of NGOs and interest groups at the supranational level are particularly interesting processes (Stroby-Jensen, 2007). Spillover-impacts are interpreted as general aftermaths of once established and continuously repeated institutional practices which lead to influence other forms of cooperation as schemes. The essential of this self-initiated framework is the interdependency between institutions (and agents) at supranational level: as the institutional tasks, responsibilities and functions are closely relating to each other, so the different institutions (and agents) of the integration cannot define their own legitimacy without other entities' functionality. Consequently, the more complex the integration becomes, the more dependent are its institutions (and agents), and because of this, the more likely that the network of cooperation will sustain (Rosamond, 2005).

The aspect of (re-)socialization of elites (or actors at the supranational level) is something closely related to the previous argument: as these actors are taking part in supranational processes, it is more probable that they are developing a kind of loyalty to the integration, rather through rational interests than deep emotional identification. Members of these elites are tasked to represent certain issues and perspectives, to build up networks, to formulate supranational level policy targets and action plans, and to implement these strategies. They are intensively involved into the work of supranational agencies which positions and roles make them being interested in sustaining these institutional frameworks and preserving their competencies as functionaries. This interdependency between the elites and the entities that provide them roles and tasks contributes

to the evolution of supranational technocracy, undermining the rigid national interest-representation (Stroby-Jensen, 2007). Accordingly, both spillover-impacts and socialization of the elites explain the same phenomenon: the previous more from an institutional perspective, while the latter rather from the point of view of actors (Grunhut, 2017).

Finally, the third dimension, the roles of NGOs and interest groups at the supranational level should be understood as a legitimizing source for integration. As supranational cooperation progress, as the agencies develop a more comprehensive and more stable institutional framework by expanding their functions (spillover-impacts); and as the elites become more involved and more embedded into this structure, strengthening thereby their own roles and contributing to the competency- and capacity-building of agencies (socialization of the elites); so the importance of supranational level processes and representations are more appreciated for NGOs and interest groups too (Stroby-Jensen, 2007). The realization of these possibilities triggers these lobby entities to create supranational level branches, expand their networks, and to develop and communicate goals, policies and strategies for this level. All together, these efforts and actions effectively assist to the stabilization of supranational institutions.

While Federalism-confederalism is more an idealist interpretation of integration theory, Neo-functionalism is rather tempting to take into consideration realist perspectives. Inter-governmentalism is a step forward on this realist/neo-realist path by a clear message of emphasizing the importance of nation-states and national level processes (Cini, 2007b). Realist and neo-realist concepts of International Relations theory highlight that nation-states are motivated to act according to their rational interests in the global processes. Therefore, political, economic and social-cultural bi- and multilateral relations are shaped from the national perspectives of maximizing profits and minimizing losses. This logic makes the international space conflict-laden, heavily competitive and overly uncertain (Nugent, 1999). Based on this understanding, realist interpretation sees supranational integrations as temporary cooperation, which serve conflicting and power-dominated national interests, and due to this, the balance is not sustainable in an open-end sense. Compare to this argument, Neo-realism admits that integrations could be long-term alliances, however the significant mechanisms, for this perspective too, are always occurring in the national contexts (Rosamond, 2000). Accordingly, Inter-governmentalism is focusing on multi-level political and economic governance, on representation of national interests in framing of supranational policies, and on the processes how national socio-political strategies embedded

into the national socio-cultural features are formulated and channelized into supranational decision-makings (Moravcsik, 1998).

Inter-governmentalism by this realist/neo-realist and structuralist approach has opened the gate for New Institutionalism to conceptualize European Integration theory. After scholars turned their attention to national level social-political processes and to national socio-cultural specificities as constraints that shape supranational policies and strategies, a shift has unfolded with the aim to understand and explain the deepening (or the stagnation) of integration not through supranational developments (or regressions) but through linkages and adaptation mechanisms between supranational and national level institutions and agents (Grunhut, 2017). Beside the new scholarly interest, a new notion also became popular: after the focus moved from integration at the supranational level to multi-level institutional harmonization and convergence, 'Europeanization' emerged as a concept referring to these balancing mechanisms between top-down (from supranational to national; i.e. downloading) and bottom-up (from national to supranational; i.e. uploading), or in a more comprehensive sense ever fluctuating (cross-loading) causes and effects in the institutional framework (Grunhut and Bodor, 2016). Although studies, especially post-structuralist approaches on Europeanization, particularly from the fields of Sociology, Philosophy, Political Science, Anthropology and the so-called 'Studies' (such as Cultural Studies, Gender Studies, Queer Studies, Subaltern Studies, Decolonization Studies, etc.), have reinterpreted the concept later, yet the institutional argument emerged during the early 2000s remained an important understanding on Europeanization.

All three approaches of New Institutionalism are represented in European Studies. Historical Institutionalism (HI) considers the different regulations, organizations, policies, procedures, interventions, action plans and strategies as the basic units of researches, and it is interested in how the supranational and the national level are influencing each other through these mechanisms and tools; which level is rather the triggering one and which is the affected; what does the required reform imply in the addressed institutional contexts; how do these structural alterations and changes proceed; is there a process of harmonization or rather divergence (Rosamond, 2007). Accordingly, HI favors the comparison of existing, tangible formal structures and pays moderate attention to the agents' activities. It sees the institutional frameworks as closed contextual set-ups for political, economic and social-cultural processes, and it accepts that these structures are constantly affected by external impacts inducing different kinds of changes. The



core problem to be investigated for this approach is the long term institutional (re-)framings through these competitive and frequently conflict-laden interactions between the supranational and the national level agencies. Therefore, HI understands Europeanization as an interventional effect that aims for national institutional reforms (Schimmelfennig and Sedelmeier, 2004, 2005).

Compare to HI, Rational Choice Institutionalism (RCI) places more intensive focus on the actors who are actively related to their formal structures. This approach considers actors as individuals motivated by rational interests to maximize their profits and minimize their losses during their interactions. It highlights that the institutional framework itself continuously creates situations that urge the participating actors to make decisions and take actions. Accordingly, RCI also concentrates on formal structures (such as policies, procedures, regulations, interventions, etc.), yet it assumes that actors, motivated by their rational interests, apply and alter institutions in a purposeful way. Therefore, RCI – compare to HI – proposes an active agent perception; although institutions provide frames for interactions, yet the actors are shaping and reshaping these set-ups by their rational choices and actions, i.e. not the structures as entities but rather rationality as an idea dominates the ongoing political, economic and social-cultural processes (March and Olsen, 1989, DiMaggio and Powell, 1991). For RCI Europeanization is a dynamic interrelationship between supranational and national level agencies and institutions; and the involved actors, by pursuing their rational interests, support these reforms as through a harmonized multi-level framework they can represent and realize their objectives in a more effective way (Börzel and Risse, 2003, Radaelli, 2003, Sittermann, 2008).

While RCI interprets individuals as rationally thinking actors, Sociological Institutionalism (SI) argues that agents' decisions are influenced not (only) by rationality but (also) by collectively accepted social values, norms, beliefs, codes, customs, rules, routines, perceptions, interpretations, understandings and taboos that are transmitted from generation to generation, with some alternations, of course, but showing stability on the whole (Grunhut, 2017). Individuals, while interacting with others (irrespective of this other is an exact person or a more abstract entity), are considering these social and cultural patterns as constraints that frame their ideas and actions. Of course, within a given society these patterns may differ very much by diverse social groups. It is also crucial to understand these patterns as influencing but not determining constraints. Notwithstanding, SI highlights that social and cultural patterns matter, so the functioning of institutions, the process of institutional changes, generally the institutional context itself is not

independent from the existing socio-cultural context (North, 1990, 1991). Accordingly, SI is interested in how the formal structures are influenced by the cultural features of actors dealing with them (Fiori, 2002). For this approach, Europeanization is – just as for RCI – a process where national institutional changes are triggered by supranational expectations and guidelines, yet the outcomes of these reforms are depending primarily not on actors rationality, but on their cultural features, on their perceptions and interpretations, and how the expected institutional reconfigurations are adaptable to these existing social patterns (Börzel and Risse, 2003, Sittermann, 2008).

### **Concepts of RCI and SI on Europeanization**

From the new institutionalist conceptualizations of Europeanization this paper is particularly focusing on Tanja Börzel's, Claudio M. Radaelli's and Thomas Risse's works. Before getting to the details, it is crucial to note that these concepts are seemingly outdated – most of the significant theoretical writings were published during the first half of the 2000s. A reason for this could be that nowadays New Institutionalism is far away to be the mainstream theoretical realm in the field of European Studies. Although there are some new trends, yet generally Institutionalism still misses to reflect on the post-structuralist turn that shifted the focus to auto-poietic identity- and self-(re)construction, to language-based, discursively emerging identifications and perceptions, and to 'post-grand narrative' and 'post-grand theory' interpretations. Another reason could be behind the theoretical 'oldness' of applied institutionalist concepts on Europeanization is that they offer a quite straight framework and a pool of literatures for comparative empirical investigations.

Risse et al. (2001) sees Europeanization as an adaptation need (a 'misfit') in their model which induces national level institutional changes. Intermediary variables are the formal structures themselves and the agents' actions which together influence the institutional reform at national level (Grunhut, 2017). This latter factor is the variable that needs to be explained. However, the causal linkage among the variables is rather circular than linear one, insofar as the reform – the dependent factor –, i.e. the alteration of national institutions has impacts on the formal structures (if not, then the reform must be a total failure) and on the actors' perceptions and interpretations, on their agency as well. This should be seen, accordingly, as a dynamic interplay. But is it possible that the national reform also influences the adaptation pressure? Probably yes, thus this option

means that Europeanization itself is up to modifications facilitated by national level institutional changes. Consequently, the model is using a circular cause and effect relationship (Grunhut, 2017).

Börzel and Risse (2003) in their framework, on the one hand, are building on the previous model, while at the same time they are enriching it with new factors. The same supranational adaptation pressure (misfit) identified by Risse et al. (2001) is the generative cause. Yet, Börzel and Risse are differentiating two pools of intermediary variables: the first dimension embraces the formal structures of the institutional context and the agents' actions related to this framework; while the other comprises different social patterns. The model, thus, aims to give a holistic interpretation in a sense of synthesizing interpretations of rationality and cultural constraints. The dependent variable, just as in the previous model, is the institutional reform at national level. However, Börzel and Risse give a more comprehensive understanding to the reform by distinguishing three aspects of it: 1) political activities (politics); public policies (policy); and political institutional system (polity) (Grunhut, 2017). Based on this extended meaning, the model aims to identify the implications of the reform in a more in-depth way that could contribute to the better understanding of the complexity of processes rather than considering them as mere tangible institutional changes. To put it in another way, Börzel and Risse emphasize that events and actions occur in the spectrum of politics and policies related to the reform are already facilitated by the adaptation pressure, therefore to focus just on the changes in the dimension of polity could be misleading. In line with this, the authors highlight that the national level institutional reform should be understood as a process affecting the formal structures and the more informal value- and norm-related social patterns of politics, policies and polities as well. And this comprehensive and interlinked progression is Europeanization itself.

While the previous model keeps the adaptation need as a generative mechanism and provides a complex explanatory framework to identify its impacts in all political institutional spectrums, Radaelli (2003) suggests an even more elaborated chain of linkages to unfold Europeanization as a process. For him the pressure, that facilitates national reforms, is not necessarily a direct intervention from the supranational level; it can also be an indirect impact in a sense of contextual change that make the national institutions, agencies and actors reflective in a self-initiative way. Radaelli in his model distinguishes two crucial dimensions. The so-called domains are the features influenced by the reform. These are the factors which appear in the framework of Börzel and Risse as politics, policy and polity. While that model is using a more

general but quite clear description to group the institutional impacts, Radaelli aims to further unfold these – possibly affected – domains. He differentiates three categories: political structures; structure of representation and cleavages; and cognitive and normative structures. The first embraces elements mostly from the polity spectrum like structure of formal political institutions, public administration and legal system, as well as governance procedures, while this category also involves political parties, interest groups and NGOs as organizational actors. Radaelli claims that these are the domains of ‘high politics’. Compare to these aspects, the structure of representation and cleavages as a category should be understood as a pool that embraces domains of ‘grassroots politics’ and features which influence the formulation of (top-down and bottom-up) policies. In light with this, Radaelli groups different business and civil agents, policy problems, policy principles and styles, as well as public policy resources and tools together in this category. Therefore, while the first dimension combines polity and politics, this second one rather encompasses features of politics and policy. Finally, among the cognitive and normative institutions the design lists values and norms, discourses, identities, legitimacy, as well as narratives, perceptions and understandings on governance.

So, these are the domains of the national level institutional framework that could be affected through reforms. Notwithstanding, Radaelli proposes crucial added values to the explanation of Europeanization as a process not by the affected domains but by distinguishing different generative mechanisms. He sees two main progressions: the vertical impact is basically the adaptation pressure (misfit) identified by both Risse et al. (2001), and Börzel and Risse (2003). The horizontal one is different, though, inasmuch these reforms are not triggered by the supranational level; these institutional changes are rather occurring in a self-initiative sense. There are two different vertical impact mechanisms in Radaelli’s design: the ‘classical’ adaptation need requires institutional changes in a way of introducing new structural solutions, while the ‘negative integration’ expects, instead, reforms through breaking down existing ones without applying any kinds of new frames. Nonetheless, the more interesting in the model is the horizontal adaptation mechanism which refers to the case when there is no direct pressure from the supranational level, yet the national institutional context still changes on its own initiative. Three cases of this are possible according to Radaelli: (1) when the supranational integration serves as an external legitimacy for the national reform; (2) when simply the practice of planning, strategy- and policy-making, and the ‘idea’ or ‘culture’ of cooperation (among different levels and agents) launches

institutional changes; and (3) when it becomes recognized that governance is not a power-struggle for domination, but a problem-, goal-, task- and solution-oriented partnership among different actors (Grunhut, 2017). As it seems, the three cases refer to three types of actors and three different situations: the first is a self-initiated reform by the state (usually by the national government); the second is more an outcome of a multi-level and multi-actor macro cooperation, and in this case the initiative is a joint effort based on mutual interests; while the third case is a situation where national actors manage to develop a balanced micro (or meso) level institutionalized cooperation for different kinds of policies.

### **A critical realist perspective**

In light of the review of new institutionalist perspectives on Europeanization and the more in-depth introduction to some main concepts, it is crucial to recognize that these interpretations consider institutional reforms as structural changes facilitated by interventions through the filters of certain external patterns like rationality or social and cultural constraints. These latter informal patterns that affect actors' ideas, decisions and attitudes should be seen as structures too. Accordingly, compare to HI, both RCI and SI by definition consider actors as active agents, yet these approaches also see subjects as pattern-followers who are adjusting their actorness to something the external representations, such as the idea of rationality and/or constraints of social-cultural values, norms, customs, conventions, rules, etc. Therefore, while there is an explicit agent-based perspective in these latter approaches, however it remains unfulfilled as to examine the different structures, among them informal but institutionalized patterns, is more important than to assume spontaneity, i.e. reflexive and critical agency from the actors. Due to this, both RCI and SI, and also their holistic synthesizations are rather approaches of rigid Structuralism than agent-based concepts. Consequently, all interpretations of New Institutionalism are closing themselves into theory-laden assumptions, which could mislead scholars in the task of understanding, observing and describing reality, both conceptually and empirically. So, on the one hand, this is a challenge to reflectivity, yet on the other, it is crucial to see that this scholarly perspective is not reflexive enough. And this is the point where Critical Realism offers innovations to new institutionalist – HI, RCI and SI – concepts on Europeanization.

This paper does not aim to give a broad (or even a brief) review on Critical Realism, so it just sums up some basic features of it (for a detailed introduction see: Archer et al. 1998,



Danermark et al. 2002). First of all, Critical Realism tries to drive attention to causal mechanisms. It rejects empiricism in a sense of narrowing down reality to empirically observable phenomena. It favors ‘critical methodological pluralism’ which refers to an open-mindedness regarding to the selection among methodological opportunities. Critical Realism suggest to apply holistic methods in research designs in order to tackle the perceived problem from different angles and by various manners. It puts the most significant emphasis on ontological (i.e. conceptual and theoretical presumptions), and leaves the epistemological and methodological issues as something important, yet dependent tasks.

Probably, the main feature of Critical Realism is its meta-theory. It claims that reality is multi-layered or arranged in levels (consequently it is not ‘flat’), and every level contains qualitatively new and different specificities (Bunge, 1979). These layers are three separated but dynamically interrelated domains. First, there is the empirical domain of the observable phenomena of ‘facts’ and ‘events’. This is the easiest to detect, both theoretically and empirically. Yet, it is just a part of reality. Moving to the second layer, it is the actual domain where things ‘actually’ happen irrespectively of we could observe them or not. Therefore, the inner-mechanisms of the actual domain are causes to the observable factors of the empirical domain, which are effects in this relationship. However, as Critical Realism argues, the mechanisms of the actual domain are just intermediary variables to an even deeper layer of reality – to the real. From this latter domain starts the whole generative process of causality, there are the ‘ultimate causes’ – as Critical Realism interprets the last realm of its framework (Bhaskar, 1978, 1986, 1989).

Why is that? Because what we observe in the empirical domain (as facts or events) is not necessarily the same thing what really happens in the actual domain. Thus, there is a difference between how we describe reality and actually what it is, i.e. between our conceptualizations on reality and the real world out there. If we saw the reality by first impressions in an adequate way, then science would not be anything else than mere data collection and data interpretation. Therefore, to understand, to perceive the mechanisms of the actual domain is a crucial task to do. Yet, if these mechanisms of the actual domain really happen or not, this is what depends on the facilitating causes of the real domain.

Some could ask: why three layers of reality and not four, or rather five? Why do not we perceive in advance that the real domain also contains a deeper layer of reality with more original causes in the link of causality? The answer to this is pretty simple: Critical Realism distinguishes

three layers not due to the causal chain of links, but based on first-handed observability of reality. There could be dozens of intermediary variables between the original cause and the final effect. However, observability of reality cannot be more complex than three layers: the empirical domain is always observable; the actual domain is partly observable and partly not; while the real domain is always non-observable by first impression. This is the responsibility of science: to go along this path to the real (Archer 1995). A question remains, though. How can a scholar be sure that by revealing more and more causes, the last one in the link of relationship is really the triggering factor from the real domain and not another intermediary cause still from the actual domain? Fortunately or unfortunately, (s)he cannot be sure, ever.

At here, this paper should switch from Critical Realism to science philosophy to cite the theories of Popper about falsification, Kuhn about paradigm shift, Feyerabend about methodological anarchism, and Rorty about inter-vocabularism and contingencies. However, the scope and the limits of this argument do not allow us to continue on this way (see: Vandenberghe, 2014). What is crucial to note that knowledge on reality is always just a snapshot; knowledge is building on previous knowledge. And beside this temporariness, another essential aspect is that knowledge is never independent from the 'knower', from the subject who gain and grasp it (the 'truth' is a 'truth' just for 'me' and never for 'you') (Collier, 1994). Based on this interpretation, Cognitive Relativism even doubts the existence of reality itself, and claims that it is a hermeneutically, in an auto-poietic way (narratively and performatively) self-constructed delusion, influenced by historical, cultural and social impacts and individual features. Critical Realism aims to take the middle way in this debate between foundationalist and anti-foundationalist philosophy, inasmuch it stresses that reality exists independently from our knowledge on it, yet our knowledge on reality is always theory-dependent, however it should not be rigidly theory-determined! Consequently, yes, Critical Realism also admits that knowledge is socially (culturally) embedded (discussed, accepted, transmitted, falsified in a dynamic process), yet the aim to continuously develop it is triggered by external 'facts' and 'events', i.e. something must be 'out there' (Sayer, 1992). The obvious challenge is that without a 'knower' it is impossible to create knowledge; it is infeasible to compare our knowledge on reality to the 'real' reality 'out there'. This is why Critical Realism is pushing for meta-theoretical thinking, as our knowledge on reality will always remain theory-laden, yet by discussing new conceptualizations, it is achievable to enrich our perspectives [although, according to Rorty (1989), this continuous theorization won't transport us closer to the

‘real’ reality, thus for his pragmatic approach the practical usefulness and the broad acceptability of concepts – which two features should be interrelated – are more important than mere theory-elaborations] (Collier, 1994).

To turn back to the main argument of this chapter, if we take into consideration the multi-layered character of reality stressed by Critical Realism, it drives our attention to an interesting aspect. The objects of natural sciences are naturally produced and socially defined, while the objects of social sciences are socially produced and socially defined. Furthermore, the objects of natural sciences are neutral, passive about the knowledge on them, and they remain unchanged irrespectively of how they are perceived and defined, while the objects of social sciences are – one way or another – including other people, they are interested in the knowledge about them, and they could react to how they are perceived and defined. Hence, while gaining knowledge in the case of natural sciences is hermeneutical, the same searching in social sciences is ‘double-hermeneutical’, inasmuch scholars of this field perceive and interpret, i.e. conceptualize others’ ideas on reality. And while these two realms of concepts – the scientific and the lay or ‘common sense’ one – could interplay for the good of all parties participating in the search of reality, yet there is also a chance that the two are heavily contesting and struggling or wrongly collaborating with each other, and, instead of revealing, they are blurring reality in a pathological sense. Consequently, to get from the empirical domain to the actual one, and from there to the real domain in natural sciences solely depends on the subject, while the progression of the same efforts in social sciences is on the shoulders of both the subjects and the objects of searching reality (Sayer, 1992). This is why lay knowledge and lay concepts should never be closed out from social science’s understandings on reality.

### **Discursive Institutionalism**

The perspective of Critical Realism opens up the gate to add different comments and remarks to institutionalist approaches on Europeanization. What this paper highlights from the brief summary of the previous chapter is that 1) reality is multi-layered and the different levels are interrelating in a dynamically causal sense through generative mechanisms; 2) there is a need for meta-theoretical thinking to reveal these generative mechanisms; 3) the objects and the subjects of social sciences should not consider each other as separated agents in searching of reality. Based on the aforementioned three fundamental statements, this paper argues that it is worth to think

about a reflexive reconceptualization of HI, RCI and SI on Europeanization along the way to make these approaches 1) less bounded by obvious empirical observations; 2) more open to reflexive theoretical assumptions; and 3) more sensitive towards ‘common sense’ conceptual inputs. For this attempt, Discursive Institutionalism (DI) may offer an opportunity to evaluate.

DI is not a new concept, it is also applied in the field of European Studies for some times (Lynggaard, 2012). It argues that discourses are both ‘institutions’ and ‘practices’. Respective to the latter sense, discourses are communicative interactions that produce and reproduce, or formulate and debate meanings, ideas, narratives, categorizations, perceptions and understandings about physical and social realities. Yet, discourses are also ‘institutions’ inasmuch the mainstream or hegemonic, on the one hand, and the ‘sidelined/underdog’ narratives, symbols, rhetorical statements, conceptual articulations and conversation styles, on the other, are both framing the cognitive schemes and the inter-subjective interactions (Kjær and Pedersen, 2001). Accordingly, knowledge and power are interlinked in a discursive way. In an ideal case, discourses serve as platforms for communicative interactions based on recognition (mutual acknowledgment), however it is more observable that discourses are laden with social conflicts, competitions, struggles and hierarchical relations. Reflecting on HI, RCI and SI, i.e. on the three original approaches of New Institutionalism, DI argues that the examination of discourses is a crucial added-value in the research of institutional changes as these reform processes are represented not just in various forms of performativity, but also in the relevant actors’ narratively expressed perceptions, interpretations, conceptualizations, understandings, symbols and framings (Schmidt, 2008). Furthermore, DI could offer deeper insights about the aspect of actors’ ideational substances respective to the cognitive logics/normative requirements of certain institutional reconfigurations that they are performatively pushing for (Schmidt, 2005). Therefore, if we accept that Europeanization is a process of adaptation between the supranational and the national level where the latter needs to be changed according to the technical/cognitive and/or appropriative/normative guidelines proposed by the former one, then DI offers an adequate approach which is focusing on how the relevant actors (e.g. decision-makers, stakeholders, experience-holders, beneficiaries, experts, members of advocacy groups and epistemic communities, different social groups, etc.) perceive this expected adaptation process (Schmidt, 2010). By this added input of discourses, institutionalist explanations on Europeanization could be enriched with crucial findings in order to examine structural harmonization/divergence in a more in-depth way. Inquiries on discourses

may help to understand how different meanings, ideas, perceptions, interpretations and understandings, i.e. set of various preferences are combined (or heavily contested) to (de)produce an accepted (or strongly disputed) policy of institutional choice in the ever changing socio-political contexts (Schmidt, 2007).

The framework of DI generally applied in the field of European Studies is based on two analytical pillars: discursive constructs and discursive agency. The former one is interested in how the supranational expectations and guidelines about national level institutional reforms are 'translated' by different actors of the domestic arena; how they are interpreting and reinterpreting these aspects, how they are adding new perceptions and understandings to them, or how they are neglecting certain criteria (Lynggaard, 2007). This focus is analyzing how inputs from the supranational level and the national level are combined into a discourse of giving meanings to various phenomena of social reality, and how interpretations of these inputs from the different levels are harmonized or contested, completing and enriching or deforming and undermining each other. Compare to this, discursive agency is more concentrating on actors and on their specific arguments that motivate/inspire them to enter discourses (Lynggaard, 2012). Therefore, 'discursive actorness' and 'discursive entrepreneurship' is the core problem of this analytical approach, the relation between actors, roles, powers, conflicts, abilities and capabilities, and, of course, the impacts of all these factors on the formulation of discourses and narrative meanings, perceptions, symbols, understandings and styles.

Obviously, DI aims to reflect on HI, RCI and SI from an agent-based, micro-oriented and constructivist perspective when it argues the importance of discursive constructs and agency. Critiques debate that this shift has any ontological novelty compare to what New Institutionalism already theorized, while they admit that the intensive focus on discourses could be seen as an epistemological or rather more as a methodological development (cf. Bell 2011, 2012). So the question is justified: from a critical realist perspective, that highlights the utmost relevancy of continuous (re)conceptualizations, why DI is crucial to consider? To answer this it should be noted again that Critical Realism stresses 1) the multi-layered dimensionality of social reality; 2) the need for meta-theoretical thinking; and 3) the interconnectivity of subjects and objects in social sciences. These criteria all emphasize that producers of intellectual knowledge should go beyond reflectivity, i.e. on the scholarly task of describing the social facts, events and actions in the most proper way possible, and they rather need to strive for reflexivity. Or to put it differently, they



need to realize their existential embeddedness into reality. To reach this perspective of reflexive scientization, intellectual knowledge/conceptualizations should consider lay ideas as ontological sources for meta-theoretical aspirations, insofar as the structures and generative mechanisms of the deep layers that shape and reshape human agency through formal and informal institutions, discourses, meanings, ‘common sense’ concepts, etc. could affect ‘intelligentsia’ too. This is why this paper finds DI as a potentially useful approach to enrich HI, RCI and SI theories on Europeanization; because it aims to map out lay people’s way of thinking and way of doing things. To address changes (or stabilities) in the institutional context through a more adequate epistemological and methodological framework, it is a great achievement. But from a critical realist perspective this has secondary importance. The reflexivity of thinkers is much more relevant as that could help to develop new concepts and out-of-the-box hypotheses. Observing and analyzing how structures and causally linked mechanisms are influencing lay people’s cognitive/normative understandings and praxes, and also their contextual frameworks from socio-political constellations, through formal and informal institutions, to discourses and so on – this is what Critical Realism suggests for reflexive ontological conceptualizations, and this is why DI could support New Institutionalism generally and institutionalist scholarships on Europeanization particularly.

### **Conclusion**

New institutionalist approaches on Europeanization are in need of theoretical innovations, and it seems hardly enough to propose holistic conceptualizations of HI, RCI and SI – suggested by Juppilä (2006) and Kauppi (2010). Although synthesized theoretical frameworks could build on various advantages of different approaches while they could manage more effectively the potential weaknesses, so these theories may be more reflective, yet without reflexivity, i.e. without considering that intellectual thinkers are also influenced by structures and mechanisms hidden in the deep layers of reality, the inherent structural rigidity of these conceptualizations remains. Critical Realism warns us that the observable facts and events are usually more complex than how we perceive and interpret them. Scientific attempts to understand the ‘world-out-there’ are always theory-laden individual understandings. The more scholars believe that their explanatory approaches are reflective, the less they are tempted to be open for self-reflexivity. While it seems to be a challenge that the objects of social sciences are interested in how they are defined and

interpreted, so they can react to the subjects' theorizations on them, which is not the case in natural science, yet it is better to see this constellation of necessary inter-subjective linkage as something beneficial to intellectual knowledge producers; this inspiration is what could make them stay reflexive through interactions with lay people. This double hermeneutical process of understanding and describing social reality should motivate scholars to see themselves as agents existentially embedded into the socio-political, socio-cultural and socio-moral constellations that they are analyzing. This should not be underestimated!

The importance of DI could be seen as a methodological innovation about tackling and investigating institutional changes (stabilities) more dynamically through lay perceptions and interpretations. Notwithstanding, the present paper emphasizes the relevance of DI not about reflectivity, but from an ontological point of view if scholars are open for reflexive reconsiderations of their original concepts. To pay attention for agency is crucial if scholars aim to debate the determining/influencing roles of deep structures and mechanisms, and they question the scientific reliability of explanatory 'grand narratives' and 'grand theories'. This is what post-structuralism is pushing for in the field of European Studies and particularly in scholarships about Europeanization. However, to observe agency is relevant also for understanding the multi-layered character of social reality, how deep structures and mechanisms are working, and how these causes and effects are influencing scholars' perceptions and interpretations, i.e. their conceptualizations and praxes as well. Consequently, New Institutionalism in the field of European Studies could gain ontologically from DI if it is used for critical realist reflexive theorizations.

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## EUROPEAN UNION INTERNAL MARKET AND ITS BARRIERS: MISSION ACCOMPLISHED OR NEVER ENDING STORY?

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**Abstract:** *This article refers to the progress and limitations of the European Union Internal Market at present. More than thirty years after the Single European Act, sixty years after the Treaties of Rome, in relation to a questionable future widening and deepening of integration in the European Union, and given the still unclear current conditions and consequences of Brexit, as well as facing the ongoing migration movements, the internal market is also today a current public policy, economic, social and real-life issue. A lot of progress towards a functioning internal market has been reached, but still unsolved issues, obstacles and barriers limiting the potential of a market consisting of all EU Member States remain. A precondition to mitigate and remove obstacles is the identification of barriers to the entire European Union Internal Market and in particular their specification to the free movement of goods, services, capital and persons. This article aims to provide a very complex view onto the European Union Internal Market and onto the currently most manifesting barriers of the European Union Internal Market and of the barriers within the economic freedoms.*

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**Keywords:** European Union, Integration, Internal Market, Barriers.

### Introduction

Economic integration in Europe was after World War II an important and main element, a common motive determining the formation of the European Union (EU) up to its present form. In

this regard, the EU Internal Market as the most developed and sophisticated economic integration project (Howarth and Sadeh, 2010) represented a ‘cornerstone of European integration’ (Egan and Guimarães, 2012, p. 1) and created necessary foundations for EU Member States’ integration also in other areas. The EU nowadays represents more than an economic cooperation or cooperation taking only economic benefits into account.

Up until 2016, the EU integration process was accompanied by a parallel enlargement and deepening of integration (Kelemen, Menon and Slapin, 2014) and for the first time in history the EU today is facing a process which is reverse in relation to what we have known so far. The disintegration of the EU (Patomäki, 2017), leaving the EU (Bachmann and Sidaway, 2016), exit from the EU (Welfens, 2016), withdrawal from the EU (Pain and Young 2004) can be used as significant naming of this process. From the point of the EU Internal Market, the events preceding and following the voting of Great Britain leaving the EU once more raised the need to deal with questions about EU integrity and functioning of its internal market. In this article the attention won’t be focused on Brexit consequences regarding the EU Internal Market. However the EU Internal Market problematic is as pertinent today as in the past it was.

Rueda-Cantuche et al. (2013) highlighted the importance of the EU Internal Market and of the European integration in the context of employment creation in the EU, by pointing out a faster economic growth of open economies. According to Egan and Guimarães (2012) the EU Internal Market has to be considered not only as a fulfilment of the EU primary law obligations, but also as a key factor for entrepreneurship, growth and employment by supporting the competitiveness. Functioning EU Internal Market is particularly important for those businesses, trading across borders (Guimarães and Egan, 2014). A common space between the EU Member States (Kostadinova, 2013), in the form of the EU Internal Market significantly helps to attain economic growth within the EU (Badinger, 2005) and to create jobs and to increase employment (Rueda-Cantuche et al., 2013). Despite its importance, there are still deficiencies of the EU Internal Market. Pelkmans and Mustilli (2014) confirmed existing EU Internal Market’s deficiencies and in this regard they stated that a minimization of these deficiencies would result in additional GDP growth in the EU and in the individual EU Member States’ economies. Siim Kallas as a European Commission Commissionaire for Transport and a Vice-president of the European Commission in 2010-14 in this regard noted, that one of the best ways to boost economic growth is the removal of barriers in the EU Internal Market (European Commission, 2015i).

Based on the importance of the EU's Internal Market – even though its implementation remains incomplete –, the goal of this article is to provide a complex identification and analysis of still existing barriers to the entire EU Internal Market and barriers to the free movement of goods, services, capital and persons. The completion of the EU Internal Market is hindered by existing obstacles. Based on the complexity of the EU Internal Market the assumption is that the same complexity and heterogeneity will also characterize the barriers itself. Regarding the barriers, it is also necessary to analyse, whether the barriers are the same between the four economic freedoms or whether the character and type of the barriers differs in relation to a concrete economic freedom. The approach in this article aims to be cross cutting and taking into consideration the entire EU Internal Market and all economic freedoms. Our analysis is based on the EU Internal Market consisting of 28 Member States, before the negotiations about the conditions of Great Britain leaving the EU started.

The article is divided into three main sections. In the first section the EU Internal Market is analysed as an uncompleted project. The second section is dedicated to an identification and characteristic of today's existing barriers to the entire EU Internal Market and of the barriers to the free movement of goods, services, capital and persons, which hinder and limit the EU Internal Market's completion. The third part analyses the terminological and content definition of the EU Internal Market and the resulting recommendations.

### **Uncompleted European Union Internal Market**

The Treaty on EU enshrined the EU Internal Market in article 3, section 3, where it is stated, that 'the Union shall establish an internal market'. Another mentions, closer characteristics and concretization of the EU Internal Market are covered by the Treaty on the Functioning of the EU. In article 3, section 1 of the Treaty on the Functioning of the EU is the EU Internal Market mentioned in relation with the exclusive EU competences and the need for adopting necessary competition rules. Subsequently, according to article 4, section 2 of the Treaty on the Functioning of the EU the EU Internal Market is defined as one of the areas, where the shared competences of the EU and the EU Member States are applied. Part three, title one of the Treaty on the Functioning of the EU is dedicated especially to the EU Internal Market, which is according to article 26, section 2 understood as an 'area without internal frontiers in which the free movement of goods, persons, services and capital is ensured in accordance with the provisions of the Treaties'. Also

other provisions of the Treaty on the Functioning of the EU, as for example article 115, article 116, article 118, article 134, are dealing with the EU Internal Market in terms of a legislative, institutional and political ensuring and supporting of its functioning. Free movement of goods, services, capital and persons, as the four economic freedoms capture the essence and characteristics of the EU Internal Market.

Free movement of goods, services, capital and persons as economic freedoms of the EU Internal Market are interconnected. In this sense, for example the free movement of services is possible only if the free movement of persons is also ensured at the same time, in relation to the services consumer and services provider and the free movement of capital, in the form of cross-border movement of capital as of the foreign direct investment. Economic freedoms of the EU Internal Market are not applied individually and each independently, but all four together in mutual interaction.

The liberalization of the free movement of goods, services, capital and persons had not taken place just as fast and achieved accomplishments in each economic freedoms were not equal. According to the European Commission (2012) the market integration in goods, despite its slower pace is still progressing, as there are EU Member States with a higher and EU Member States with a lower level of integration in this area, given the development of the intra-EU imports and exports in goods to GDP. The European Commission (2012c) when comparing the trade in services with the trade in goods had stated that in long-term perspective the trade in services is characterized by a lower integration level. Lower integration level and a slower liberalization in services sector comparing to other economic freedoms was confirmed also by Levent (2009). Despite this fact, the entire EU has, thanks to the free movement of services in the EU Internal Market, a dominant position on the global services market (Kerneis and Prentice, 2011). In regards to the free movement of persons, as being a fundamental component of the EU Internal Market (Carrera, 2005; Răvaş, 2009; van Riemsdijk, 2013), the migration between the EU Member States remains at a low level (Bluj, 2008). Labour mobility in the EU is substantially lower than its potential in the EU Internal Market, as the economically active EU population working in another EU Member State accounts for only 3.1 per cent of the EU workforce (European Commission, 2012). European Commission (2012) underlined the importance of the free movement of capital being a key integration factor and as of a necessary prerequisite for investments and innovations. At the same time when referring to the effects of the global economic crisis the European Commission (2012)



highlighted, that changes in the finance sector of the individual EU Member States is essential to coordinate, because the opposite – no coordination – could jeopardize the economic integration and limit the benefits resulting from the European financial integration.

The history of the European integration process, particularly of the EU Internal Market formation has shown that the EU Internal Market is in an ongoing process, which is accompanied by elimination of the existing barriers to the free movement of goods, services, capital and persons. The perception of the EU Internal Market as of a process was in different contexts highlighted for example by Palmer (1989), Cherchye et al. (2007), Howarth and Sadeh (2010), Egan and Guimarães (2012). Already Palmer (1989) drew attention to a gradual establishment of the EU Internal Market and to a fact, that it's impossible to predict its completion. Cherchye et al. (2007) characterized the EU Internal Market as an ongoing process of four economic freedom's implementation. According to Howarth and Sadeh (2010) the EU Internal Market is an unfinished project, which completion can be difficult to predict and which is moreover constantly reinterpreting and supplementing with new goals. EU Internal Market as a project was characterized also by Egan and Guimarães (2012), who as the reasons for an unfinished EU Internal Market stated mainly continuing protectionist tendencies of the EU Member States and non-compliance with uniform rules.

Unfinished and uncompleted EU Internal Market was characterized also by Knudsen (2005), Canoy and Smith (2008), Arnold and Wörgötter (2011), König and Ohr (2013). According to Knudsen (2005) is the existence of the EU Internal Market only an appearance and because of existing barriers there can't be a functioning EU Internal Market. Canoy and Smith (2008) assumed that the EU Internal Market can never be completed, because of the dynamic character of markets. Arnold and Wörgötter (2011) came to a conclusion, that the completion of the EU Internal Market takes place at an uneven pace. Similarly König and Ohr (2013) claimed that the economic integration in the EU is in the individual EU Member States at different levels, based on differences between the integrated countries. Although Wagner (2015) has noted the creation of the EU Internal Market, in his research focused on posting of workers to another EU Member States he pointed out the changing character and formation of new borders between the EU Member States. Polanski (2015) has also used a statement about a completed EU Internal Market, but at the same time he analysed and highlighted the existence of electronic barriers and an uncompleted Digital Single Market.

With regards to the trade conditions of businesses in the EU Internal Market, Guimarães and Egan (2014) identified the free movement of goods as the most integrated and successful EU Internal Market's economic freedom, although despite this statement they indicated in this area remaining obstacles and deficiencies. Hafner, Robin and Hoorens (2014) also stressed, that obstacles and barriers hindering the free movement of goods in the EU Internal Market currently still exist, but they also stated, that the barriers to the free movement of goods are smaller than the barriers to the free movement of services.

Incompletion and dysfunction of the EU Internal Market, concretized regarding the free movement of services also appeared in the topical literature (Aidukiene and Kazlauskiene, 2012; Badinger and Maydell, 2009; Canoy and Smith, 2008; Howarth and Sadeh, 2010; Jacobsson, 2013; Kerneis and Prentice, 2011; Pelkmans and Mustilli, 2014). Badinger and Maydell (2009) but also Aidukiene and Kazlauskiene (2012) pointed out the incompleteness of the services in the internal market in the context of the adoption of the Directive 2006/123/EC of the European Parliament and of the Council of 12 December 2006 on services in the internal market (Services Directive). Here it was characterized as an important tool for completion of the EU Internal Market in services. Jacobsson (2013) noted the EU Internal Market in services as uncompleted and characterized by the heterogeneity of the EU Member State's policies. Canoy and Smith (2008) stated the incompleteness of the services internal market based on the heterogeneity of services itself, which makes the internal market in services complex and difficult to unify. Kerneis and Prentice (2011) highlighted the EU Internal Market in services only as seemingly well-functioning, in which still many barriers exist though. Pelkmans and Mustilli (2014) described the EU Internal Market in services as dysfunctional, where still possibilities for its deepening, improvement of its good functioning and elimination of existing gaps and shortcomings remain. Howarth and Sadeh (2010) in relation to services in the EU Internal Market reminded that despite the importance of services, the achieved progress in liberalization of services was small, especially in comparison to the industrial goods.

According to Badinger and Maydell (2009) but also based on Egan and Guimarães (2012), the integration of services lags behind the integration of goods, despite the high share of services in GDP. Canoy and Smith (2008) building on the statements about a further reaching integration in goods compared to services indicated, that the integration in services will take longer. Pelkmans (2012) comparing the integration of the free movement of goods and the free movement of services

has also stated, that the integration in services has always lagged behind the deepening of the EU Internal Market in goods and that it was less extensive and less firm. Arnold and Wörgötter (2011) have recalled the differences in integration of goods and services, where on the one side they highlighted the progress within the free movement of goods and mutual recognition of standards, and on the other side they stressed the relatively little progress in the services sector and in the mutual recognition of qualifications with the connection of services and of the free movement of persons.

In relation to the free movement of capital, Jonathan Hill as a representative of the European Commission responsible for the financial stability, financial services and the union of capital markets has noted, that the EU Internal Market even today isn't still fully functioning (European Commission 2015g). Pungulescu (2013) stated a still ongoing process of capital market's integration and the lack of the free movement of capital in the EU Internal Market. Bartz and Fuchs-Schündeln (2012) confirmed that the internal market is uncompleted also in relation to the free movement of persons. According to Martinoia (2011) the free movement of persons remains a problem of the EU integration process, as evidenced by the low internal migration between the EU Member States.

Juncker (2014) when introducing his plans as of a candidate for the President of the European Commission 15th July 2014 in Strasbourg has identified the EU Internal Market and the necessity to complete the internal market in goods and services as one of his priorities. The EU Internal Market remains uncompleted as a whole but also partially within the free movement of goods, services, capital and persons.

### **Barriers to the EU Internal Market**

An uncompleted EU Internal Market and its understanding as a process means, that there are obstacles hindering the completion of this process. These obstacles have the character of barriers, which are barriers to the entire EU Internal Market and barriers to the free movement of goods, services, capital and persons in the EU Internal Market. Even today 'barriers to a true single market remain plentiful' (Guimarães and Egan, 2014, p. 25).

Legal barriers to the EU Internal Market are manifested in the form of missing legislation acts where necessary, non-transposition of legislation regulations regarding the various components of the EU Internal Market, incorrect transposition of the EU Internal Market

legislation or in the form of a delayed transposition of the EU Internal Market legislation. These legal barriers were according to the July 2016 edition of the Single Market Scoreboard (European Commission, 2016g) characterized through:

- transposition deficit, which amounted 0.7 per cent in EU average, what means that 0.7 per cent of all legislation acts have not been transposed into the national legislation. Each EU Member State has had the transposition deficit and thus each EU Member State haven't transposed some part of the EU Internal Market legislation.
- compliance deficit, which amounted 0.7 per cent in EU average and each of the EU Member States had to some extent a compliance deficit. This highlights the inconsistency of the transposition processes in the EU Member States, because 0.7 per cent of all legislation acts regarding the EU Internal Market were transposed incorrectly and infringement procedures were launched.
- Number of long overdue directives, with transposition deadlines more than two years past. Altogether 10 EU Member States had such directives, with Austria (three directives), France (two directives) and the Netherlands (two directives) to name the three worst EU Member States in this regard.
- transposition delay, which indicates the delay in transposition for overdue directives in months. EU Member States were in average 10.1 months delayed and each one of the EU Member States had a transposition delay.

Indicators analysed through the Single Market Scoreboard identified, that the nature of the legal barriers to the EU Internal Market is not only the lack of legislation acts, as of an important tool for ensuring the conditions for realization of all four economic freedoms, but also inconsistency of the EU Member States.

Legal barriers remain and new ones appear in all economic freedoms. According to the 2014 and 2015 Annual reports of the Court of Justice of the EU (Court of Justice of the European Union, 2015; Court of Justice of the European Union, 2016) new cases were reported regarding the free movement of goods (11 cases in 2014 and eight cases in 2015), freedom to provide services (19 cases in 2014 and 24 cases in 2015), freedom of establishment (26 cases in 2014 and 12 cases in 2015), free movement of capital (seven cases in 2014 and six cases in 2015) and freedom of movement for persons (11 cases in 2014 and 15 cases in 2015).

Terták (2010) indicated fiscal barriers as the barriers to the EU Internal Market, and this related to the little EU competences in the area of taxation, while some progress has been already made in the application of non-discriminatory taxation. According to Howarth and Sadeh (2010) the EU Internal Market will remain uncompleted, unless there is a unified taxation system. But given the traditionally national fiscal policy and taxation competences, the EU Member States will remain restrained in terms of harmonization progress. Fiscal harmonization is ‘as necessary as it is desirable’ (Trandafir, 2013, p. 647) and in particular the world economic crisis highlighted the importance for a responsible fiscal policy by the EU Member States. But the EU Member States’ governments already based on the experiences of the world economic crisis have adopted necessary measures for cautious fiscal policies (Berrittella and Zhang, 2015).

National culture and traditions also play an important role within the development of the EU Internal Market and together with the economic integration they influence the realisation of economic freedoms. On the one hand, the excessive preference of national culture and traditions would be in conflict with the European legislation, but on the other hand they have to be taken into consideration as a factor influencing the movement of economic freedoms (Hojnik, 2012).

A new type of barriers is created in the Digital Market when it comes buying and selling of goods and services online. The European Commission (2016c; 2016d) pointed out obstacles and deficiencies existing in e-commerce and regarding geo-blocking. In this sense, anti-discrimination measures are being circumvented and consumers or sellers are limited because of their belonging to a particular EU Member State. This was confirmed also by a research focused on the existence of territorial restrictions in the EU Member States in cross-border purchasing, according to which 63 per cent of all online purchases were in different stages of the purchase made impossible because of geo-blocking (European Commission, 2016e).

Barriers to the free movement exist in all economic freedoms (Egan and Guimarães, 2012). Existing barriers within economic freedoms were identified by the European Commission but also by several authors.

Barriers to the free movement of goods were specified by Bourdet and Persson (2012), Guimarães and Egan (2014), Hafner, Robin and Hoorens (2014); barriers to the free movement of services were pointed out by Canoy and Smith (2008), Egan and Guimarães (2012), Hojnik (2012), Howarth and Sadeh (2010), Jacobsson (2013), Kasman and Turgutlu (2011), Kerneis and Prentice (2011), Lee (2013), Pelkmans and Mustilli (2014); barriers to the free movement of capital were

analysed by Bröhmer (2007), Ringe (2010), Robin-Olivier (2012) and barriers to the free movement of persons were noted by Bartz and Fuchs-Schündeln (2012), Caragliu et al. (2013), Kovacs et al. (2014), van Riemsdijk (2013).

*Barriers to the free movement of goods*

Guimarães and Egan (2014) identified technical and administrative obstacles as the main barriers to the free movement of goods, which are most frequent in the food trade. According to Bourdet and Persson (2012) administrative obstacles remain in the EU Internal Market in the form of trade procedures. The majority of quantitative restrictions to the free movement of goods in the EU Internal Market have been removed, as for example import quotas and export restrictions. Non-tariff barriers to the free movement of goods in the EU Internal Market, in the form of technical standards limiting the trade, were also eliminated. Administrative barriers, however, are most visible in trading across-borders and according to the research carried out by Bourdet and Persson (2012) there are substantial differences between the EU Member States regarding delays in cross-border trade. Subsequently, the importer is supplying goods in to the EU Internal Market, but the length of the import procedure varies depending on the recipient country. According to the Doing Business 2015 report the administrative process can take five days in Cyprus, Denmark and Estonia up to 19 days in Hungary, 18 days in Italy and 17 days in Czech Republic (World Bank, 2014).

After a change in methodology in the 2016 Doing Business report, when taking into consideration only auto parts as a homogenous product regarding the import process (World Bank, 2015), the above mentioned differences between the EU Member States have to be reanalysed. However, even after specifying the analysis, still differences in terms of time remain and the EU Member States although as a part of the EU Internal Market, show differences when dealing with importing goods across borders. The latest 2019 Doing Business report shows that even if the overall trade across borders has become faster and easier, some of the EU Member States maintained obstacles in importing goods. Obtaining documents, preparing documents, processing documents, presenting documents and submitting documents can take up to 36 hours in Belgium. Other EU Member States can deal with it within one or two hours. Customs clearance and inspection procedures conducted by other official agencies were reported as activities, which can take up to 48 hours in Belgium, 24 hours in Ireland and 15 hours in Cyprus. Any other EU Member

State dealt with such activities within a maximum of three hours (World Bank, 2019a; World Bank, 2019b).

Persisting administrative barriers to the free movement of goods were identified also by The European Commission, which according to the press release from 26<sup>th</sup> February 2015 referred Germany to the Court of Justice of the EU because its national legislation does not comply with EU law. The European Commission pointed out the additional administrative obstacles in the form of requirements for notification of pyrotechnic articles and of their user manuals to the relevant government authority in Germany, despite the fact that the manufacturer fulfilled all necessary conditions in an another EU Member State (European Commission, 2015c). Hafner, Robin and Hoorens (2014) described administrative barriers and thereto linked other type of barriers in the context of an existing fragmentation and duplicity of product quality and safety requirements. Thus, additional administrative requirements often occur, because of newly adopted EU pieces of legislation regardless of previously existing national legislation. Administrative barriers can also cause linguistic barriers in cases where forms and documents are only available in the native language. In the case of companies trading across borders, the lack of harmonisation when dealing with administrative requirements leads to additional costs. The free movement of goods was according to the European Commission (2016d) limited also in Slovakia and Portugal regarding unjustified restrictions on the export of medicines. The European Commission has in this regard sent reasoned opinion in May 2016 and requested Slovakia and Portugal to remove unjustified obstacles to the free movement of goods.

#### *Barriers to the free movement of services*

Based on the heterogeneity of economic activities in the services sector, the existing barriers to the free movement of services are complex as well (Egan and Guimarães, 2012). By using the example of professional services, Kerneis and Prentice (2011) have demonstrated the existence of legal, administrative and regulatory barriers, which affect service providers in the EU, but also which mainly limit service providers originating outside of the EU Internal Market. Jacobsson (2013) also noted the existence of administrative barriers to the free movement of services. In addition to existing legal barriers, Pelkmans and Mustilli (2014) highlighted an important group of intangible barriers, that are only little or not at all linked to the EU regulations, policies and legislation. They have introduced language and culture, networking and trust, local



nature of some services and asymmetric information as these intangible barriers. Canoy and Smith (2008) stresses, that they cause a permanent heterogeneity in regards to the language and cultural barriers and that they can therefore be understood as legitimate barriers.

Pelkmans and Mustilli (2014) identified legal barriers as barriers in *acquis* in relation to the Services Directive, public procurement, infrastructure, financial services, professional services, security services and hazard, cross-cutting services. In this sense the Services Directive requires an in-depth analysis of the state of implementation, detailed monitoring with regards to the services providers and services consumers. In the case of the European public procurement is a potential improvement possible through a harmonisation of processes and remedies, which are still EU Member States' national competence. Deficiencies in network industries, as for example railways, electronic communications, electronic frequencies and air traffic control, can be removed by appropriate incentives for supporting cross-border networks. This is only possible, however, if EU Member States' approaches take into account the needs of the EU Internal Market in services rather than just defending national competences, public and private financing of EU-wide networks. Barriers to financial services are associated with a persistent fragmentation, which is influenced by the obstacles to access retail banking services, mortgages, cross-border mergers and by missing instruments to ensure a stable financial system. Professional services are regulated mainly on national level, with a harmonization only in health care profession. Security services, gambling and cross-cutting services in retail, digital single market and logistic services are in terms of a legislative harmonization characterized by fragmentation and national specifics.

Except for legal barriers characteristic by a missing legislation the free movement of services in the EU Internal Market is limited also by deficiencies in transposition of the European legislation on national level. According to the July 2016 edition of the Single Market Scoreboard 35 of the total 732 infringements in the EU in 2015 were related to services. The average duration of these cases dealing with infringements in services was 37.8 months in EU average. Deficiencies in transposition of the EU legislation related to services have been the case in 18 EU Member States. When taking into account also other areas analysed by the Single Market Scoreboard, for example service sectors such as air transport - 82 cases, health and consumers - 20 cases, road and rail transport - 45 cases, transport safety - 42 cases, which all are as such service related activities, the overall number of infringements in services in 2015 would reach 189 (European Commission, 2016f).

As administrative barriers Kerneis and Prentice (2011) specified the additional restricting measures in EU Internal Market access for the non-EU professional service providers in the form of additional licences and permits, the need for approval of professional qualifications by a competent authority and lack of transparency in economic needs tests. Restrictions in providing services across borders are according to the European Court of Auditors (2016) apparent specifically when online purchasing, when the seller refers the customer from another EU Member State to a domestic seller with different terms and conditions of sale.

Because of new administrative barriers, the European Commission initiated in 2015 infringement procedures against Germany in the case of introducing minimum wages in transport services within Germany. The European Commission objected to such a regulation of minimum wages, because of its negative and disproportionate impacts on the freedom to provide services as well as on the free movement of goods in the EU Internal Market. Germany has not restricted the provision of services by foreign service providers on national territory but introduced new administrative barriers in this case. Foreign transport services providers would have a reporting obligation against customs authorities in Germany in the form of administrative forms provided by the German customs authorities. Furthermore, a refusal to pay minimum wages according to the German law will result in sanctions (European Commission, 2015h).

Pelkmans and Mustilli (2014) indicated language barriers as a factor often underestimated, which significantly impact the engagement of companies in cross-border contracts and public procurements though. By using the example of rail transport services, Pelkmans and Mustilli (2014) and Howarth and Sadeh (2010) stated the effects of language as a limiting barrier, reflected in the necessity to fulfil strict language preconditions for train drivers and in the exchange of train board staff on the EU Member States' borders. The train transport example has also a wider context, because it concerns the free movement of persons, recognition of qualifications and in the end social security and wages matters.

Despite the intended removal of existing obstacles to the free movement of services, the language barriers have not been clearly addressed by the Services Directive. The use of language is mentioned in the Services Directive on several occasions and in several contexts. In the introduction of the Services Directive the use of a clear and unambiguous language is stressed out in section 50 and the non-interference of provisions considering the points of single contact with the use of official languages in section 52 and section 60. The main text of the Services Directive

enshrined the use of a plain and intelligible language in article seven, section two; provision of information in a clear and unambiguous manner in article seven, section three; realisation of measures in the EU Member States to provide information in several languages, but with no interference what so ever on the use of the official languages and thus this only positively encourages EU Member States in article seven, section five.

Cultural barriers and barriers in tradition reflect national specifics and national traditions of each EU Member State. Liberalisation within the EU Internal Market in this regard limits some of the cultural and national specifics. Restrictions on opening hours and on the retail sale of some types of goods such as alcoholic products in some EU Member States are thus equally affecting the citizens of the respective EU Member State, but also the potential customers from other EU Member States, e.g. in the case of services providers from another EU Member State (Hojnik, 2012). Restriction to the free movement of services by a cultural barrier can for example limit a service provider residing in Slovakia, who provides services also in Hungary. Provision of services in Hungary will have to be in accordance with the national legislation of Hungary, even though the traditions in Slovakia may be different to those in Hungary. This is the case when considering the opening hours of retail stores on Sundays. An influence of culture on the opening hours in retail was stressed out also by Howarth and Sadeh (2010).

Cultural effects in relation to religion were highlighted by Lee (2013), who noted religion as a factor supporting the trade in services by the creation of institutional and network effects. 'These effects enhance trade in services more than trade in goods' (Lee, 2013, p. 1001). The importance of culture was also mentioned by Kasman and Turgutlu (2011) who in the context of insurance services considered the culture as an essential factor impacting the EU Internal Market's creation.

In relation to electronic services the European Commission (2015j) noted the impact of trust as a barrier limiting the retail cross-border sale, whereby even though 50 per cent of the EU inhabitants buy online, only five per cent of companies in EU retail sell across borders.

#### *Barriers to the free movement of capital*

Barriers to the free movement of capital can according to Robin-Olivier (2012) have the form of restrictions in investing outside of an EU Member State. Robin-Olivier explained this by using the example of the Fiat company during the world economic crisis and the collective

negotiations between the company and employee representatives. A company that would commit to stay in a concrete EU Member State and thereby retain jobs, in exchange for concessions in rights and requirements of the employees, would act contrary to the application of the free movement of capital. The focus on individual interests of the Fiat company and of the employees, on local or national government interests, cannot be considered as in accordance with provisions of the Treaty on the Functioning of the EU. Ringe (2010) in this regard stated, that the Court of Justice of the EU has not provided unified case law concerning the free movement of capital, because private companies are only occasionally subject to the free movement of capital requirements and vice versa state measures are almost always related to the free movement of capital. The free movement of capital can be limited also through a disproportionate state intervention, which would limit incoming investments into strategic companies by using a maximal share in this company, whereby only the Court of Justice of the EU could state the compliance of such measures with the EU primary law provisions on the protection of national interests (Bröhmer, 2007).

The existence of barriers to the free movement of capital was also stated by the European Commission (2015e), which according to the press release from 29<sup>th</sup> April 2015 initiated infringements procedures against Latvia. The European Commission objected to the Latvian national legislation, which would require from the potential buyers of agricultural land from another EU Member States to meet the required professional qualifications of staff and the lack of tax arrears. Also Bulgaria, Hungary and Slovakia according to the European Commission's press release from 26<sup>th</sup> March 2015 (European Commission, 2015d) were asked to provide explanation of the compliance of national legislation in the field of agricultural land with provisions of the Treaty on the Functioning of the EU. The procedures of the European Commission in this regard were based on the assumption of a discriminatory treatment, which would include measures such as residence requirement in a given EU Member State, restrictions for persons without a local residence or without previous business activities in the territory, various restrictions based on missing professional knowledge, restrictions in ceding the use of land to another subject or requiring a prior approval of sales contracts. These requirements would then be contrary to the free movement of capital but also to the freedom of establishment. The European Commission considered the letter of formal notice as insufficient and requested Bulgaria, Hungary, Latvia and

Slovakia on 26<sup>th</sup> May 2016 to adjust their national legislation within two months in the form of reasoned opinion (European Commission, 2016c).

*Barriers to the free movement of persons*

Existing barriers to the free movement of persons were described by van Riemsdijk (2013) in relation with obstacles to the free movement of Polish nurses and that resulting from the efforts of some EU Member States to protect national labour market and because of non-recognition of qualifications, which is caused mainly due to national differences in education and training. Kovacs et al. (2014) identified administrative type mobility barriers in the context of administratively complicated and complex processes when obtaining licences and registrations of doctors. Caragliu et al. (2013) came to a conclusion, that the migration is influenced not only by the distance, but also by barriers of values, culture and formal institutes, which affect behavioural norms. According to Bartz and Fuchs-Schündeln (2012) the ongoing incompleteness of labour mobility within the EU is caused by permanent barriers and not by national borders, the language differences being a permanent obstacle.

In the European Report on the Free Movement of Workers in Europe in 2012-13 the European Commission (2014) reported obstacles, which still exist in some EU Member States. Requirements on residence in a given EU Member State as a precondition for social benefits access, requiring language skills as a job prerequisite, access to study grants only for students from a particular EU Member State, possibility of employment in state administration only for the citizens of the concrete EU Member State or fulfilling strict national language knowledge were in this regard identified as main barriers. The European Commission (2015b) according to the press release from 26<sup>th</sup> March 2015 has identified the existence of administrative barriers to the free movement of persons in the case of Belgium, where the proceedings were referred to the Court of Justice of the EU. Belgium was in this regard objected because it unilaterally refused to recognise documentation certifying the fulfilment of social security duties in another EU Member State. EU citizens temporarily working in Belgium or employed at the same time in several EU Member States are according to the EU legislation authorized to pay their social security only in one EU Member State and have to notify this to the other countries. Belgium decision to unilaterally require the payment of the social security contributions while refusing to recognize the payments made in another EU Member State failed to comply with EU law in this regard. According to the

European Commission's press release from 29<sup>th</sup> April 2015 (European Commission, 2015f) actions on the Court of Justice of the EU were also undertaken against Hungary, which allows the access to notary profession only for national citizens. The Hungarian national legislation when requiring nationality in principle contradicted to the free movement of persons, but also the free movement of notary services and freedom of establishment.

Incompletion of the EU Internal Market is caused by the existence of barriers (overview of barriers see Annex 1) to the free movement in all four economic freedoms. Progress in the EU Internal Market's integration is different in economic freedoms, as for example higher in goods and smaller in services. Legal and administrative barriers are present in all four economic freedoms, and cultural and language barriers are more characteristic for the free movement of services. The future development regarding Brexit can also bring new political barriers to the entire EU Internal Market and consequently for all economic freedoms. In accordance to the existing barriers to the free movement of goods, Hafner, Robin and Hoorens (2014) have summarized, that it is unlikely for all barriers to be removed and that their elimination is a gradual process. Provided summary can be noted and transferred also onto the barriers to the free movement of services, capital and persons, respectively on the barriers of the entire EU Internal Market. The identification of existing barriers is a necessary precondition for their future mitigation.

### **Internal or Single European Union Market**

The term EU Internal Market isn't used in the literature uniformly. Some authors (Altinisik, 2012, de Boer, 2013; Kosta, 2010; Lalanne, 2011; Lang, 2009, Terták, 2010); used the term internal market. Other authors (Bena and Jurajda, 2011; Edwards, 2008; Howarth and Sadeh, 2010; Choudhry, Jayasekera and Kling, 2014; Kasman and Turgutlu, 2011; Kawalec and Pytlarczyk, 2013; König and Ohr, 2013; Lockwood and Migali, 2009; Marques, 2010; Tasan-Kok, 2013; Wagner, 2015) used exclusively the term single market. According to Kučerová (2010) the terms internal market and single market are used to highlight the degree of integration, unification of markets and removal of barriers. Monti (2010) has stated that from his perspective it is preferable to use the term single market in comparison with the term internal market. He reasoned this mainly because the citizens could understand the term internal market as binding to their own national country and not to the entire EU, further that from the non-EU countries' view

the internal market could be seen as a market inwardly closed and last but not least that the term internal market does not give such a degree and feel of unification as the term single market does.

Synonymous understanding of the terms internal market and single market was used in the literature by several authors (Badinger and Maydell, 2009; Brännström, 2014; Buckley and Howarth, 2010; Buckley, Howarth and Quaglia, 2012; Canoy and Smith, 2008; de Bruijn, Kox and Lejour, 2008; Glachant and Ruester, 2014; Cherchye et al., 2007; Kerneis and Prentice, 2011; Nahuis, 2004; Norman, 1989; Notaro, 2011; Polanski, 2015; Quaglia, 2010; Rueda-Cantuche et al., 2013; Santagostino, 2012).

The European Commission uses primarily the term internal market, but there is no terminological unification in all areas. Based on the presentation of political priorities of J.C. Juncker as of a candidate for President of the European Commission from 15<sup>th</sup> July 2014 (Juncker, 2014) the term single market was used in relation to the Digital Single Market. The composition of the European Commission 2014-19 proofed this terminological inconsistency when introducing the Commissioner for Internal Market, Industry, Entrepreneurship and SMEs and the Commissioner for Digital Single Market (European Commission, 2015a). The Treaty on EU and the Treaty on the Functioning of the EU are terminologically unified when using the term internal market.

Based on the terminological inconsistency, understanding of the internal market as of an uncompleted process and building on the identified barriers to the EU Internal Market in all four economic freedoms, the EU market can't be considered as single and fully uniform. Uniformity would indicate internal conformity, what given the on several occasions in this article identified barriers and differences between the EU Member States cannot be concluded. We are inclining therefore to the exclusive use of the term EU Internal Market, which better captures the essence of the current market consisting of 28 EU Member States.

## **Conclusion**

The EU Internal Market isn't until today completed and it represents a process, in which completion in the short term can't be assumed. The EU Internal Market is a complex system, which includes the free movement of goods, services, capital and persons. All these subsystems are constantly changing because of economic, social, international and global influences. The EU Internal Market is therefore a living system that will never reach a full mobility of goods, services,



capital and persons. The incompleteness of the entire EU Internal Market is transferred also to the free movement of goods, services, capital and persons. Vice versa can be stated, that the EU Internal Market isn't functioning because the free movement of goods, services, capital and persons is not functioning.

The reason for the EU Internal Market's incompleteness and of the limited mobility of economic freedoms is the existence of barriers. Barriers are considered as obstacles, limits or other similar measures, which hinder the free cross-border movement of goods, services, capital and persons in the EU Internal Market. Barriers can be caused by measures of the EU Member States, measures of specific businesses or they exist at the level of individuals. Barriers at the level of individuals are of a subjective nature and that is why they are persisting barriers and complicated to remove with EU or EU Member States interventions. Barriers to the entire EU Internal Market were identified, namely legal barriers, fiscal barriers, electronic barriers, barriers of culture and traditions, political barriers. Barriers to the entire EU Internal Market are affecting the free movement of all economic freedoms. Specific barriers to the free movement of goods, services, capital and persons were also identified, which don't affect the free movement of goods, services, capital and persons individually but they are all interlinked. Thus, barriers to the free movement of services can in this regard also represent barriers to the free movement of persons and the free movement of capital.

In this article identified and described today existing barriers to the entire EU Internal Market and barriers to the free movement of goods, services, capital and persons in the EU Internal Market are not considered as a list of all concrete existing barriers in the EU Internal Market, respectively of all concrete in the EU Internal Market indicating impacts of these barriers today. However, it is a complex view onto the barriers in the EU Internal Market considering all economic freedoms. Main types of barriers in the EU Internal Market and current barriers to the free movement of goods, services, capital and persons in the EU Internal Market were identified and described.

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## Annex 1

### Barriers to the entire EU Internal market and to the economic freedoms

EU Internal Market	Type of barriers	Author / authors
Entire EU Internal Market	Legal	European Commission (2016g); Court of Justice of the European Union (2015); Court of Justice of the European Union (2016)
	Fiscal	Terták (2010); Howarth and Sadeh (2010); Trandafir (2013)
	Culture	Hojnik (2012)
	Electronic	European Commission (2016c); European Commission (2016d); European Commission (2016e)
Free movement of goods	Technical	Guimarães and Egan (2014);
	Administrative	Guimarães and Egan (2014); Bourdet and Persson (2012); World Bank (2014); World Bank (2019a); World Bank (2019b); European Commission (2015c); Hafner, Robin and Hoorens (2014); European Commission (2016d)
	Legal	Kerneis and Prentice (2011); Pelkmans and Mustilli (2014); European Commission (2016f)
	Administrative	Kerneis and Prentice (2011); Jacobsson (2013); European Court of Auditors (2016); (European Commission, 2015h)
Free movement of services	Regulatory	Kerneis and Prentice (2011)
	Language	Pelkmans and Mustilli (2014); Canoy and Smith (2008); Howarth and Sadeh (2010)
	Culture	Pelkmans and Mustilli (2014); Canoy and Smith (2008); Hojnik (2012); Howarth and Sadeh (2010); Lee (2013); Kasman and Turgutlu (2011)
	Networking and trust	Pelkmans and Mustilli (2014)
Free movement of capital	Local nature of services	Pelkmans and Mustilli (2014)
	Asymmetric information	Pelkmans and Mustilli (2014)
	Trust	European Commission (2015j)
	Investing restrictions	Robin-Olivier (2012)
Free movement of people	State interventions	Bröhmer (2007)
	Legal	European Commission (2015e); European Commission (2015d); European Commission (2016c);
Free movement of people	Administrative	Riemsdijk (2013); Kovacs et al. (2014); European Commission (2014); European Commission (2015b); European Commission, 2015f
	Culture	Caragliu et al. (2013)
	Language	Bartz and Fuchs-Schündeln (2012); European Commission (2014)

Source: own elaboration

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## THE CONCEPT OF EUROPEAN INTEGRATION IN THE EU-UKRAINE PERSPECTIVE: NOTIONAL AND INTERPRETATIVE ASPECTS OF LANGUAGE EXPRESSION

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**Abstract:** *This article focuses on the concept of European integration (the EUROINTEGRATION-concept) as an integral part of the EU philosophy, policy, and overall worldview which is of prime interest for contemporary Ukraine that is currently undergoing a set of political, economic, and sociocultural transformations on its way to becoming a full member of the European Community. In particular, the study aims at revealing the ways in which the concept is perceived in the European integration discourses of the European Union and Ukraine. Since language is a tool for structuring human thoughts, we treat language as a point of entry for analyzing the world's construal in human cognition. Thus, both conceptual structure and content are analyzed on the basis of verbalized (language) externalization of the concept in English and Ukrainian languages and political and media discourses of the European Union and Ukraine. The study rests on the theory of a three-layered conceptual model that features notional-informative, figurative-associative, and interpretative layers. The paper discusses the contents of the notional and interpretative layers of the EUROINTEGRATION-concept. The lexicographic analysis backed by discursive interpretation helps to reveal convergences and divergences in the way European integration is conceptualized (understood and evaluated) in the European Union and Ukraine.*

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**Keywords:** EUROINTEGRATION-concept; conceptual layer; notional-informative layer; interpretative layer; European integration discourse.

### Introduction

Since the turn of the century, globalization and Europeanization trends have been producing a great impact on Ukraine's socioeconomic transformations, its domestic and foreign

policy-making. At the same time, each new cycle of political changes in the state makes the Ukrainians adopt new and effective forms of civic activism and self-identification. Such determination for change and the desire to at least partially get rid of the “post-Soviet” label have led to the emergence of such realities of modern Ukraine as *eurodesign* (European design), *eurorenovation* (European standards renovation), *euroservice* (European standards service), *eurowindows* (PVC windows), or *euroyard* (European patterns of improving rural territories). In the composites of this type, the prefix *euro-* acts as a cognitive “guarantor” of high quality and modernity, innovativeness and progressiveness that are characteristic of the “Western states” conventionally regarded by the Ukrainians as a common culture-historical and geographical area. At the same time, for an average citizen, say, of Germany or Croatia, the Ukrainian ideas of *eurotires* or *eurowallpapers* remain in the sphere of transcendence, as does the insight into what makes a decent lecturer’s fee *European* in the minds of the Ukrainians.

The European aspirations of Ukraine contributed to the fast spread of the official EU terminology of eurolect in Ukrainian (e.g. *eurobonds*, *eurozone*, *euromarket*, *European Commission*, etc.). “The language of the EU” penetrated both political-economic and sociocultural discourses and contributed to shaping a specific type of discourse – the European integration discourse. At the heart of the European integration discourse of Ukraine lies the concept of European integration (the name usually contracted in Ukrainian to *euointegration*, Ukr. *євроінтеграція*). The hypothesis of this article is that the source concept of European integration is differently conceptualized and externalized in the cultures and languages of the EU and Ukraine.

### **Theoretical background**

Concepts represent significant, typical, and meaningful fragments of human experience (Karasik et al., 2005). The concept’s significance for a particular culture is defined by the level of its externalization in the national language picture of the world (cf. the actualization of the SOUL-concept in the West-European and East-European traditions and languages). Moving from the semantic content of words to the content of concepts, we proceed to the sphere of consciousness, to building models of the concepts which constitute the national concept-sphere and are the units of national culture (Popova and Sternin, 2007a).

According to the semantic-cognitive approach to conceptual analysis (V. Evans, V. Karasik, A. Prykhodko, M. Pimenova, Z. Popova, I. Sternin, etc.), concepts are organized

according to the field principle (core::periphery) and may be described in terms of a three-layered model structured by the notional (informative), figurative-associative, and interpretative layers (or field components). The contents of these layers constitute heterogeneous “quanta” of knowledge about the concept. These we call conceptual features that get representation in language through different language means. The core of the concept and the by-core zone constitute the most apparent knowledge of the language speakers (speech community) about the fact of reality behind the concept. Other cognitive representations, normally added by culture, traditions, and people’s collective and individual experiences, constitute the periphery. The elements of the periphery constitute the zone of transition to other concepts, thus, establishing links between the concepts within conceptual systems.

The notional layer of the concept exposes its informational content, covers the minimum of cognitive attributes that define the most significant differential features of the object of conceptualization, and excludes occasional, indirect, and evaluative meanings (Popova and Sternin, 2007b). In other words, the informational content of the concept is made up of a minimum set of cognitive features that render the most important and distinctive information about the object or phenomenon behind the concept.

According to Z. Popova and I. Sternin, the interpretative field is structured by the cognitive features that interpret the basic informative content of the concept or follow it, reproduce some inferential knowledge or evaluate it (Popova and Sternin, 2007a). The interpretative field of the concept has a heterogeneous structure and is made up of five zones: evaluative, utilitarian, regulating, sociocultural, and paremiological. These zones possess a special inner unity of content and cognitive features that cohere with them (Popova and Sternin, 2007a).

The present study focuses on the analysis of the conceptual content of the two aforementioned layers. However, within the semantic-cognitive approach, the cognitivists also single out the figurative-associative layer. It comprises sensual (perceptual) image, which is a product of reflecting objective reality through the human sensorium, and a set of conceptual metaphors that, according to the theory of cognitive metaphor of J. Lakoff and M. Johnson (Lakoff and Johnson, 2003), structure our thinking. The associative field of the concept comprises the cognitive features most frequently occurring in and extracted from a set of people’s associations induced by sensual perceiving of the name of the concept. We believe that the analysis of these fields of the EUROINTEGRATION-concept in the EU-Ukraine perspective deserves independent

research and description. Thus, further in this article, we confine ourselves to analyzing the notional-informative and interpretative layers of the concept.

### Methodology

The notional content of any concept is exposed through a set of informative cognitive tokens that compose a definitional minimum of features which defines the kernel of the concept. Above all, the interpretation of the factual content of the EUROINTEGRATION-concept envisages performing component, etymological, and definitional analyses of its prime verbalizers – the concept's key names *European integration* in English and *євроінтеграція* (*європейська інтеграція*) in Ukrainian. Identifying the etymon that lies behind the core element of the composite helps define “the initial point of its semantic filling” (Kolesov, 1992, p. 39), to learn “the preliterate history of the concept” (Stepanov, 1997, p. 7).

As long as the informative content of many concepts is close to the definition of the key nomination of the concept (Popova and Sternin, 2007a, p. 77) and is conventionally fixed by lexicographic sources (Prykhodko, 2013, p. 22), we turn to interpreting the actual (up-to-date) meaning of the lexemes *integration* and *інтеграція* (as the core components of the compounds) and the source verbs from which they derived – *to integrate* and *інтегрувати*. For this, we address the modern explanatory dictionaries of English and Ukrainian (English Oxford Living Dictionaries (EOLD)), Macmillan English Dictionary (MED), Словник української мови (Dictionary of the Ukrainian Language, SUM) and Великий тлумачний словник сучасної української мови (Large Explanatory Dictionary of the Contemporary Ukrainian Language, VTSSUM) and study the corresponding entries. The application of componential analysis to the definitional texts helps define the semic composition of the lexemes and derive conceptual features of the words from the sets of semes that form sememes. These “elementary parts of sense” to be extracted in the definitional texts we call semantic summands. Each semantic summand in the sampling acquires its index of occurrence the value of which gives grounds for determining some conceptual features pertaining to the notional layer of the EUROINTEGRATION-concept.

Further reflections and interpretations engage the elements of discourse analysis of media sources. It is used mainly to study the interpretative layer. Discourse analysis is a method of text analysis based on the representation of discourse as a complex communicative phenomenon, “designating a particular way of talking about and understanding the world (or an aspect of the



world)” (Phillips and Jørgensen, 2002, p. 1). According to Burton (2010, p. 13), the essence of a discourse is the meaning we have about its subject. So, the European integration discourse covers not only the mental space of the EU officials but also that of common Europeans and Ukrainians: how they understand its key concepts and perceive its values, how they represent them in language and communication, what the European integration means to the European cultures and Ukrainian one in particular.

We believe that the real ‘image’ of the concept imprinted in a particular culture may be ascertained only through the analysis of different discourses. Thus, the elements of discourse analysis are applied in this study to analyze how the EUROINTEGRATION-concept is featured in the related political and media discourses which to a great extent shape the everyday discourse. This analysis envisaged the conceptual interpretation of the discursive fragments taken from different Ukrainian and EU online newspapers, blogs, and other informational and political resources like *InterPressNews*, *VoxEU.org*, *Mirror Weekly*, *Interfax-Ukraine*, *KyivPost*, *Ukrinform*, *Europe Blog*, *AZquotes site*, *Europe.eu* etc.

## Results and discussion

### *Notional-informative layer*

According to its morphological structure, the concept’s key names in both languages – *eurointegration* and *євроінтеграція* – are products of compounding from the word-combinations *European integration* and *європейська інтеграція* with the second element as the core one.

The lexeme *integration* is a term of Latin origin with a high degree of internationalization (cf. *integration* in English, *integración* in Spanish, *Integration* in German, *integracja* in Polish, *integrasyon* in Turkish, *integrinti* in Finnish, etc.). According to Oxford Latin dictionary (OLD), the etymological profile of the Latinism *integratio* can be viewed as follows:

**noun** *integratio* – ‘returning’, ‘restoring’ > **verb** *integro*, *integrare* – ‘to restore to the former condition’, ‘to renew’; ‘to reinvigorate’; ‘to take up anew’, ‘to resume’, ‘to renew’; ‘to make whole, complete’ > **adjective** *integer* ‘not previously touched’, ‘fresh’, ‘not yet decided’, ‘open’, ‘unprejudiced’, ‘not exhausted by previous activity’, ‘intact’, ‘fresh’, ‘whole’, ‘complete’, ‘youthful’, ‘unimpaired by ill health or disease’, ‘unblemished’ > **particle** *in-* ‘un-’ + **verb** *tango*,

*tangere* – ‘to touch’, ‘to make a mention of’, ‘to affect’, ‘to border on’, ‘to adjoin’, ‘to taste’, ‘to arrive at’.

Thus, the common proto-image that forms the cognitive basis of the Latin word is ‘the absence of an act of sensual (mostly tactile) experience’. Over time, the semantics of the derivatives have broadened not only due to their entry into other lexico-grammatical classes of words but also due to the semantic development: ‘not previously touched’, ‘intact’, ‘fresh’, ‘complete’ → ability to acquire these features, ability to regenerate and renew.

The results of componential analysis of the lexemes *integration/to integrate* and *інтеграція/інтегрувати* (see Table 1) lead to the procedure of cognitive interpretation and defining a set of basic (core) conceptual features of the notional layer of the EUROINTEGRATION-concept. In both languages, integration is viewed as a ‘process’ of ‘combining’ ‘separate units’ into ‘a whole’. It should be noted that only English presents a range of cognitive features vital to the proper interpretation of the European integration discourse. These are ‘society’, ‘membership’, ‘participation’, ‘institutional character’, ‘desegregation’, ‘getting’ or ‘giving’ certain rights and opportunities. Accordingly, the core component of the concept’s name in English features a wider semantic spectrum and the notional layer serves a stable and valid basis for further associative or evaluative layers of the concept. Alongside, in Ukrainian, the notional content of the concept does not lay a proper foundation for figurative and interpretative fields, the constituents of which “stratify” in the process of the lexeme’s functioning in discourse.

Table 1. Semantic Composition of Lexemes *integration / to integrate* and *інтеграція / інтегрувати*

Semantic summands	SUM	VTSSUM	EOLD	MED	q
об'єднання / integrating, combining, intermixing, connect, together	+	+	+	+	4
єдине ціле, повнота / a whole, full, completely	+	+	+	+	4
складається з (різних, окремих) частин / single, segregated, another (thing)		+	+	+	3

дія, процес, діяльність / action, process, activity		+	+	+	3
інституційність / institution, organization		+		+	2
система, організм / unit, system		+		+	2
люди, суспільство / people, group, society, social			+	+	2
членство, залучення, «включеність» / membership, involved, participation			+	+	2
становлення, набуття / becoming, come into			+	+	2
приведення в дію, надання / bring into, make smb become			+	+	2
расовість / segregated, races, racially			+	+	2
упорядкування, узгодження, координація / regulation, coordination		+			1
рівність / equal			+		1
доступність / allowing to use				+	1
великий / larger				+	1
ефективність / effective				+	1
зміна / change				+	1
правила / rules				+	1

Source: own elaboration.

Back to the first component of the concept's name, the prefixes *euro-* and *євро-*, we focus on the semantics of their source lexemes *European* / *європейський* in English and Ukrainian.

In the case of English, three relevant online explanatory dictionaries prove strong systemic reference of the lexeme *European* to the EU:

1) Collins English Dictionary (CED) traces the reference to the EU indirectly (see meaning 5):

European

1. Of or relating to Europe or its inhabitants.
2. Native to or derived from Europe.

European

3. A native or inhabitant of Europe.
4. A person of European descent.
5. A supporter of the European Union or of a political union of the countries of Europe or a part of it.

2) The English Oxford Living Dictionaries (EOLD) provide with references to geographical, geopolitical, demographic, and sociopolitical contexts where *European* is used as an adjective or a noun:

European

1. Relating to or characteristic of Europe or its inhabitants.
- 1.1 Relating to the European Union.

European

1. A native or inhabitant of Europe.
- 1.1 A national of a state belonging to the European Union.
- 1.2 A person who is committed to the European Union.
- 1.3 A person of European parentage.

3) MED offers equal references to geographical, ethnocultural, and geopolitical contexts of the lexeme's usage:

European

1. Relating to Europe, or its people or culture.
2. Relating to the European Union.

A completely different case is that of the Ukrainian language whose modern lexicographic sources do not suggest any systemic semantic reference of the lexeme *європейський* to the European Union. Even the online version of the renowned Dictionary of the Modern Ukrainian language (SUM), currently under revision of the experts from the Ukrainian Lingua-Information

Fund of National Academy of Sciences of Ukraine, boils down to a conventional definition (both original and translated texts provided):

ЄВРОПЕЙСЬКИЙ, а, е. Прикм. до європейці і Європа // Такий, як у Європі, у європейців; власт. Європі, європейцям. // Стос. до народів і держав Західної Європи; західноєвропейський. // Відомий усій Європі.

EUROPEAN Adj. to the Europeans and Europe. // Such as in Europe, as the Europeans have; peculiar to the Europeans. // Applied to the peoples and states of Western Europe. // Known throughout Europe.

Thus, again, we evidence significant restrictions as to the semantic content of the concept's name at the notional (factual) level. The fact how often the concept of European integration is being "triggered" in every day, political, and media discourses of Ukraine proves that Ukrainian lexicographic science has been sluggishly responding to the dynamics of the sociopolitical processes of today and the demands of modern times. In our opinion, there already exist plenty of reasons (apart from geographic ones) to consider both geopolitical and sociocultural contexts to which the lexeme *європейський* usually refers at present. Without a systemic (lexicographic) fixation, the term *євроінтеграція* is unable to render the full spectrum of cognitive features born by the source term in English.

Table 2. Notional Conceptual Features of Concepts EUROINTEGRATION / ЄВРОІНТЕГРАЦІЯ

	Ukrainian	English
European integration	<ul style="list-style-type: none"> <li>● relates to:</li> <li>- Europe</li> <li>- peoples / residents of Europe / the Europeans</li> <li>- the European states</li> <li>- Western Europe<sup>1</sup></li> </ul>	<ul style="list-style-type: none"> <li>● relates to:</li> <li>- Europe</li> <li>- the inhabitants of Europe</li> <li>- the European Union</li> <li>● of European origin</li> </ul>

<sup>1</sup> Somewhat obsolete but still active among some Ukrainians is the approach to interpret the semantics of the lexeme *European* by applying the historical-geopolitical principle: in the post-war era, 'European' has long referred to a

	<ul style="list-style-type: none"> <li>known throughout Europe</li> </ul>	<ul style="list-style-type: none"> <li>a supporter of the European Union</li> </ul>
	<ul style="list-style-type: none"> <li>combining elements to form a whole</li> <li>unity, integrity</li> <li>system, organism</li> </ul>	<ul style="list-style-type: none"> <li>combining elements to form a whole</li> <li>unity, integrity</li> <li>system</li> <li>membership</li> <li>society</li> <li>institutional character</li> <li>absence of racial discrimination</li> <li>acquiring or giving certain rights and opportunities</li> </ul>

Source: own elaboration.

To sum up, the content of the notional layer of the concept in English and Ukrainian differs in volume: the English language is able “to encode” multiple conceptual features to be stored in the concept’s informative layer. These features are seen as that factual (and the most general) “quanta” of information about the denotatum. The Ukrainian language, however, does not possess enough systemic sources to relevantly “decode” all this information. Thus, some notional information is perceived in the form of images, associations, or personal judgments rather than facts that build up corresponding layers in the concept’s structure.

### *Interpretative layer*

The notional layer structures the core but not the whole concept. The factual information conveyed by the concept’s name is not enough for rendering the full content of the concept and

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comparatively united sociocultural hub in Western Europe in terms of political demarcation between the liberal West and the communist East.

shaping a cross-cultural profound understanding of the corresponding phenomenon (in our case, by the Ukrainians as compared to the EU citizens). Thus, we turn to analyzing the way the EUROINTEGRATION-concept gets actualized in speech (political and media discourses) and proceed to describing its interpretative field. The linguistic analysis of the European integration discourse enables revealing a wide spectrum of evaluative meanings of subjective natures at the levels of individual and collective (regional and national) conceptualization.

The postulated principles of the EU functioning actualize the foundations of the conceptual field “European citizenship” in the linguocultures of the EU citizens. They also feature such key concepts of sociopolitical, media, and everyday discourses as STABILITY, SECURITY, RELIABILITY, FREEDOM, etc. These concepts dominate the mental environment of the EU civil society which is the primary carrier of the corresponding European values.

A. Prykhodko states that the filling of the evaluative zone is conditioned by the very attitude of a person/a group towards the concept which must be positive for it rests on those spiritual impulses that awake in human consciousness due to the person’s belonging to a particular ethnic and lingua-cultural group (Prykhodko, 2013). The evaluative zone of the interpretive field accumulates cognitive features that express general evaluation (good/bad), aesthetic (beautiful/not beautiful), emotional (pleasant/unpleasant), intellectual (clever/stupid), and moral (kind/wicked, legal/illegal, just/unjust, etc.) (Popova and Sternin, 2007a). We start by analyzing the filling of this zone in the English language discourse of the EU and consider several discursive fragments:

(1) *European integration has proved phenomenally **successful*** (Joergers et al., 2000);

(2) *The idea of European integration and its implementation not only gave rise to **an entirely new order in Europe** – to be more exact, in Western Europe – but European history underwent a **fundamental about-turn*** (Timuş, 2016);

(3) *J. M. Barroso: We must respond and say that our values are **a source of inspiration** for many countries and I know that the Marie Skłodowska-Curie year has many students, from the South to the East of Europe and from outside Europe, who could directly testify to this* (Barroso, 2011);

(4) *In its turn, European integration is understood as **a way of achieving important economic benefits**, both at country level and individual level* (Timuş, 2016);



(5) *And it is this process of European integration that is now being called into question by many people; it is viewed as a **bureaucratic affair** run by a **faceless, soulless Eurocracy** in Brussels – at best boring, at worst dangerous* (Joergers et al., 2000);

(6) *The European Union allows countries to **do collectively** what they **could not do individually** – that is to **compete** with countries like America and China **on a global scale**. This of course should in theory **strengthen Europe's position globally and politically**, but it also **threatens to take away** some of the **power** of individual governments. Many describe the European Union as **“bureaucratic”** and at times even **un-democratic** as many of the officials are appointed rather than elected* (Europe Blog).

(7) *As long as EU integration is seen as **a project of the political elites and the rich**, it will carry the **seeds of its own destruction*** (Buti, 2017).

The foregoing fragments of political discourse feature the everlasting divergence of opinion on the role of the European integration. On the one hand, the success of the implementation of European standards in the domestic policies of the Member States is seen as a success of global and historic importance (“*entirely new order in Europe*”, “*fundamental about-turn*”), as a way to economic prosperity (“*economic benefits*”), as points of pride for Member States (“*our values*”, “*do collectively what could not do individually*”, “*compete on a global scale*”) and inspiration for the others. On the other hand, European integration is severely criticized because of being under the control of the rich and the elite who practice red tape (“*bureaucratic*”, “*Eurocracy*”) and malfunction (“*seeds of own destruction*”) because of building utopian plans and threatening freedom.

Similar controversies in evaluating the denotatum behind the concept under study are traced in the European integration discourse of Ukraine:

(8) *Eventually, European integration is **about “improvement and wellbeing”** but not today and exceptionally in case of **reforms** ... In the long run, European integration is the **most eligible and advantageous strategy** for the **development** of Ukraine. Of prime importance here, as ever, the skills and goals of those who get this **“fishing rod”*** (Holub, 2017);

(9) *Thus, Ukraine's course to European integration is **beyond question**, although the road to Europe will be full of **hardships, challenges, and disappointments**. It will require us to develop a healthy **sense of national egoism** and economic and foreign policy forecasting. At the same time,*

it will make us **abandon the illusions** of getting some significant external support and the **hopes** for external participation and assistance in fast **problem-solving** inland (Bohdan, 2015).

The excerpts above prove that, in the context of Ukraine, European integration is an important economic factor for the country's further development and is positively valued (conceptual features "improvement", "wellbeing", "reforms", "eligible", "advantageous", "strategy", "development", "fishing rod" etc.). The defined conceptual features evidence the desire of the Ukrainians to join the European Union as soon as possible, and thus get rid of the economic crisis. Meanwhile, the path of Ukraine towards economic prosperity in the EU gives rise to concerns which add to the negative evaluation of the concept (cognitive features "hardships", "challenges", "disappointments", "egoism", "illusions", "problem-solving").

The utilitarian zone of the concept accumulates cognitive features that express utilitarian or pragmatic attitudes of people towards the concept's denotatum, as well as the knowledge related to the potential and peculiarities of its use for any practical needs (Popova and Sternin, 2007a). For defining the constituents of the zone, we turn to the fragments of political discourse all taken from Joergers et al. (2000):

(10) *Robert Schuman: We must build the united Europe not only in the interest of the free nations, but also in order to be able to admit the peoples of Eastern Europe into this community if, freed from the constraints under which they live, they want to join and seek our moral support. We owe them the example of a unified, fraternal Europe. Every step we take along this road will mean a new opportunity for them;*

(11) *Accordingly, European integration process is seen as helping the newly emerging democracies of former USSR to find their own geopolitical place within the new European architecture;*

(12) *Of a particular importance are statements that claim that European integration process is the only one capable of helping the post-Soviet republics to escape Russian influence in the region... and ensuring the national statehood;*

(13) *Countries may wish to join the European Union (EU) to enjoy the benefits associated with membership. Some of the benefits include freedom to move to member countries, lowered product prices and better employee rights.*

The discursive fragments show that in the English-language EU discourse, European integration is primarily associated with the countries of Eastern Europe – those with the Soviet

past and presumably under Russia's strong influence. In this context, European integration is viewed as a single "lifebuoy for emerging democracies" which is expressed by lexical units exclusively marked by positive connotation: *to admit, to free, to help, to ensure, a new opportunity, a way of achieving, benefits, freedom, lower (prices), better.*

Zolkina (2013) reports the dynamics of public attitudes towards the European integration and the utilitarian significance of the EUROINTEGRATION-concept for common people in pre-Euromaidan Ukraine (2007–2013). According to the survey data, the main benefits of joining the EU for Ukraine would be free movement, raising the living standards, and easier access to European education. Alongside, the strongest fears of the Ukrainians in this connection were around the issues of emigration, immigration ("tides of foreigners, selling out the country"), and deterioration of relations with the CIS member states (Zolkina, 2013, pp. 7-9). Further findings, however, prove the disappearance of the polarity in integration priorities in the post-Euromaidan period: the Ukrainians are no longer significantly tormented by the choice between the EU and the Custom Union vectors (Zolkina and Haran, 2017, Public Opinion Survey of Residents of Ukraine, 2018). Among the core expectations of the Ukrainians from integrating into the EU are: access to the common market and border-free travel, security and stability, the EU financial aid, and support for democratic governance and rule of law (Public Opinion Survey of Residents of Ukraine, 2018, pp. 39-40).

Since media and political discourses are under prime consideration in this study, we turn to their fragments that help define the conceptual features of the concept's utilitarian zone in the Ukrainian language EU discourse which is vividly outlined by a kind of consumerism towards the denotatum. European integration is associated with the realization of quite important practical goals and is seen as an immediate tool for their achievement. However, of note should be the dynamics of "maturity" of expectations from those only Ukraine is interested in to those of pan-European significance:

(14) *[In the light of the 2004 enlargement of the European Union], along its borders, the EU will seek to create a zone of **stability** and **prosperity** with a particular interest in **wealthy** and **environmentally sound** Ukraine. Thus, our diplomats are expecting to obtain **technological help and credit funds** from the EU for the soonest implementation of the **European standards of life** in Ukrainian* (Sokolova, 2003);

(15) ... *European integration is not merely a choice or a benchmark, it is **a tool for strengthening democracy, economic growth, and modernization** of the key economic spheres, for **enhancing competitive strength** of the Ukrainian manufacturers especially by supporting them in accordance with the **anti-discrimination** policy and world trade regulations ...* (Holub, 2017);

(16) *EU–Ukraine DCFTA, which is a part EU–Ukraine Association Agreement, will establish legal, economic, and institutional foundations for **free movement of goods, services, capital, and, people**. In the future, the extremely large and diversified EU market, removing foreign trade barriers, harmonization of regulatory principles and improvement of market institutions can become **powerful catalysts for Ukraine’s economic growth...*** (Bohdan, 2015).

The regulating zone of the interpretive field make up cognitive features that serve as “prescriptions” of what to be or not to be done in the sphere covered by the concept under consideration (Popova and Sternin, 2007a). Both in English and Ukrainian discourses, the filling of the regulating sector of the EUROINTEGRATION-concept is primarily featured through modal verbs and other constructions with the semantics of obligation. For example:

(17) ... *we **must put into place** the last brick in the building of European integration, namely political integration* (Joergers et al., 2000);

(18) *Peter Mandelson: **We’ve got to demonstrate** why European unity and integration, our vast single market, our single currency, equip us with the strength to embrace globalization* (AZquotes Site).

We should mention that the key aspects of EU-Ukraine integration are regulated by the provisions of the EU-Ukraine Association Agreement which also contributes to the exchange of information, experience, and best practices. The EU bodies provide Ukrainian authorities with numerous consultations, advice, and recommendations, which officially are not binding but in fact of directive nature for Ukraine:

(22) *The European Union **has reiterated** the Ukrainian authorities **should bring** the bill on the High Anti-Corruption Court **in line with the recommendations** of the Venice Commission, according to an UNIAN correspondent in Brussels* (KyivPost, 2018);

(23) *Head of the EU Delegation to Ukraine Hugues Mingarelli **stresses the need to create** an anti-corruption court in Ukraine **in accordance with the recommendations** of the European Commission for Democracy through Law (Venice Commission)* (Interfax-Ukraine, 2017).

Thus, the analysis proves that the main conceptual features peculiar to the regulating zone are: “obligation”, “condition”, “need”, “recommendation”, “instruction”, “an algorithm”, etc.

Sternin and Rosenfeld claim that some conceptual structures have a symbolic zone that stores the information about the symbolic meaning which the conceptualized phenomenon acquired in culture (Sternin and Rosenfeld, 2015). The prime symbols of European integration are those of the European Union: the European Flag, the Anthem of Europe (performed purely instrumental due to a large number of official languages in the EU), the Motto of the European Union (“United in diversity”), and the Europe Day. Across the globe, the Europe Day is considered the day to celebrate and promote the EU’s main ideas and values:

(24) *Europe Day, held on 9 May every year, celebrates **peace and unity in Europe**. The date marks the anniversary of the historical ‘Schuman declaration’. At a speech in Paris in 1950, Robert Schuman, the then French foreign minister, set out his idea for a new form of **political cooperation in Europe**, which would make **war between Europe's nations unthinkable*** (Europa.eu).

Thus, the main features of the concept’s symbolic zone in the English-language discourse of the EU can be defined as follows: “unity”, “diversity”, “peace”, and “cooperation”.

Since 2003, Europe Day has also been officially observed in Ukraine, though on the third Saturday in May. While, in the EU, it is a day of celebrating achievements, in Ukraine, it is still a day of expressing intentions:

(25) *On its **way to becoming a full member of the European community**, 15 years ago, Ukraine introduced the tradition of celebrating Europe Day. The holiday is treated as **a way to introduce and promote the EU values** in Ukraine* (BEYOND.UA).

Up to present, the flower and outcome of Ukraine’s strivings for the European integration symbolize the events of 2013–2014, known as “Euromaidan” or “the Revolution of Dignity”. For some, these developments in the heart of Ukraine became a turning point from “pseudo-Eurointegration” to the real eurointegrational shifts; for the others, they led to further frustration. Anyway, so far, Euromaidan remains the core symbol of the European integration in Ukraine sacredly referred to by the Ukrainian politicians when holding debates or delivering speeches.

Among the symbols of manifesting eurointegrational intentions of Ukraine is also the use of the European Flag. Since the days of the Revolution of Dignity, popularity gained a symbolic

ritual of hoisting the EU flag at the Ukrainian government buildings and in other public places. On this account, O. Moisiienko says (Moisiienko, 2016):

(26) *In Ukraine, there is an established practice of displaying the flag of the EU and the Council of Europe by the decisions of local councils. These decrees treat the use of the European symbols as a **sign of public support** of Ukraine's European integration course which is a **top priority** of both home and foreign policy of Ukraine. They also emphasize that Ukraine is a **European country with a common European history and values** and that it commits itself to **promote and uphold these values**.*

All these facts lead to the assumptions that such conceptual features as “EU membership”, “EU values”, “sharing”, and “Euromaidan” primarily constitute the symbolic zone of the EUROINTEGRATION-concept in the Ukrainian discourse.

Adjacent to the symbolic zone is the sociocultural zone which covers cognitive features that reflect the concept's association with everyday life and folk culture embedded in traditions, customs, music, history, sport, literary works, precedent texts, etc. (Popova and Sternin, 2007a). Thus, positive assessment of the EUROINTEGRATION-concept by the people gets revealed through the cultural heritage: cinematography (*Winter on Fire: Ukraine's Fight for Freedom* – a 2015 documentary film about the Euromaidan protests in Ukraine), music (Eurovision Song Contest; Killing Joke's “*European Super State*”, Kateryna Buzhynska's “*Europe and Ukraine*”, etc.), pieces of fine art (*The Statue of Europe (Unity in Peace)* in Brussels symbolizes peace achieved by means of the European integration) and art projects (*Eurointegration through Art*), numerous scientific popular works (Alina Polyakova's *The Dark Side of European Integration*; Peo Hansen & Stefan Jonsson's *Eurafrica. The United History of European Integration and Colonialism*; Mary Farrell, Stefano Fella and Michael Newman *European Integration in the 21<sup>st</sup> Century*, etc.), and others. However, the contents of this zone can be hardly analyzed within a comparative approach, so in this study, we limit ourselves to giving general remarks on it.

The paremiological zone is represented through a set of cognitive features externalized by the proverbs, sayings, and set expressions. In other words, these cover all the statements or ideas about the denotatum as reflected by the concept through the folk wisdom fund (Popova and Sternin, 2007a). Here we consider the examples from the English-language discourse first:

(27) *There is an old saying in Brussels folklore: Integration is like riding a bicycle – if you don't **keep going**, you **fall off*** (Emerson, 2015);



(28) According to him [Janos Herman], Euro Integration has many **preconditions**. It is necessary to work intensively on fulfilling them. As he said, he does not like citing proverbs, but as the Chinese say, if you want **to cross a bridge** you should **approach a river first**. Therefore, this might be a matter of a generation, – the Ambassador added (InterPressNews, 2015).

In the given discursive fragments the European integration is associated with a purposive action that needs thorough prior preparation (*precondition, approach ... first*) because it is a lifelong commitment (*keep going*) which requires taking constant pains and does not forgive inactivity (*fall off*).

Needless to say, a long-term political and economic crisis in Ukraine let the ideas of Euroscepticism (both public and political) penetrate into the social and political discourse. From the general perspective of the European integration and following P. Kopecky and C. Mudde, the civil society of Ukraine (similar to that of the EU) can be stratified into the groups of Euro-enthusiasts and Euro-sceptics as adherents of European integration and the groups of Euro-pragmatists and Euro-opponents being hostile to the European integration processes (Kopecky and Mudde, 2002). Thus, in the context of Ukraine, the processes of European integration and deepening of socioeconomic and geopolitical crisis related to it in 2013 mostly got actualized through negative paremiological and allusive units:

(29) (about the relations in the context of the EU–Ukraine–Russia) *Today, Ukraine is at the point described by Homer in the twelfth book of “The Odyssey”. **Scylla** was dragging everybody approaching the **terrible whirlpool**. **Charybdis** sucked the sea terribly and spewed it out again* (Bondarenko, 2013);

(30) *When Mr. Yanukovych mentions European integration in his speeches, a Basarabian proverb comes to my mind “**Why so poor? Because foolish! Why foolish? Because poor!**” Mr. Yanukovych says, Ukraine is too poor to join the EU ... “Why is Ukraine so poor? Because of foolishness and lack of modernization! Why is it foolish and unmodernized? Because of its poorness!” How to break this vicious circle then?! There is no way out!* (Vysotskyi, 2013);

(31) ..., the present **dialogue between Brussels and Kiev** resembles a well-known proverb: **we are talking about “apples”** (setting European prospects for Ukraine in the Association Agreement) **and they are keeping on “oranges”** or even on the lady-gardener [Y. Tymoshenko] who is ill-treated by the authority in power – the factor that deprives Ukraine of all its European prospects (Selskyi, 2011).



Ukraine of 2013 was viewed as standing on the crossroad (*apples or oranges*) torn apart by the interested parties (*Scylla and Charybdis*) and incapable (*foolish and poor*) of making strong-willed decisions. However, in 2018, Ukraine is facing the future with confidence never to turn off the road and ready “to do in Rome what the Romans do”:

(32) *At present, the situation with the rights of LGBT persons reminds the Ukrainian proverb: “You never know what you can do till you try”. Unlikely that the politicians take real care of the sexual minorities’ rights, they rather realized that LGBT can’t be thrown out of the “eurointegrational train”, otherwise it won’t pass the EU’s customs (Hloba, 2016);*

(33) *There is a saying: the dogs may bark, the wind may blow tomahawks, but the caravan, our Ukrainian caravan, moves on. In a week, on September 01, the EU-Ukraine Association Agreement enters into force and becomes a road map for our reforms. And there is only one road for us – a broad Euro-Atlantic autobahn that leads to our membership in the EU and NATO,” stated the President (Ukrinform).*

Thus, we face the dynamic development of the concept in the Ukrainian worldview and the sensitivity of the paremiological zone to the modification of the conceptual contents.

To sum up, within its interpretative field, the concept strongly features the core (evaluative, utilitarian, regulating) and the periphery (symbolic, sociocultural and paremiological) zones.

The study proves that the core of the interpretation field of the EUROINTEGRATION-concept constitute utilitarian and evaluative zones. Backed by the real experience, certain knowledge in relation to European integration gets actualized in the EU discourse through language units with positive and negative connotations. The lack of such practical experience of “living in the EU” in the case of Ukraine explains the dominance of positive evaluations of the European integration; however, the way to this “secured life” seems extremely uneasy and stipulates negative connotations. In the English-language EU discourse, the regulating zone belongs to the core of the interpretative field whereas in the discourse of Ukraine it takes a by-core position: the rule and supremacy of law are still rather strivings than norms. The regulations of European integration in the English-language EU discourse are viewed as a task “to keep” and “to improve” whereas in Ukraine, they are seen as “to create”, “to reform”, and “to achieve”.

The EU pays much attention to the sociocultural aspect of integration – the pledge of harmonious coexistence of nations, cultures, and religions within the community. The EU is proud of its toleration and language policies. It supports educational and scientific mobility and promotes

its social values worldwide. In the context of Ukraine, these values have not been fully adopted yet. Thus, these cognitive features of the concept remain in the periphery zone of the EUROINTEGRATION-concept.

### **Conclusions**

The EUROINTEGRATION-concept as the heart of the European integration discourse is a complex cognitive product of comprehending and interpreting the set of geopolitical, economic, and sociocultural processes in modern Europe. In the European integration discourse of Ukraine, the EUROINTEGRATION-concept is an abstract category of knowledge and practice, rather regarded not as a life philosophy of the society but as an ideological benchmark or a constructive goal that sets up priority vectors of Ukraine's development today.

The contrastive analysis of the conceptual content in both English-language and Ukrainian-language systems and EU discourses demonstrate essential divergences in conceptualizing and interpreting the phenomenon of the European integration. It means that European integration is differently represented and verbalized, and thus perceived by the EU and Ukrainian citizens. However, the predominance of positive associations and evaluations found in the Ukrainian political and media discourses of today catalyze the overall eurointegrational processes in Ukraine and make the EU closer to Ukrainians. At the same time, the EU context actualizes such EU realities as "unemployment", "loss of national identity", "outflow of skilled labor", "immigration", "refugees", "economic crisis", "high costs", "red tape", etc. whereas in the Ukrainian-language discourse of the EU, there is still little constructive criticism over the EU policies. To some extent, some prefer to see the world through rose-colored spectacles, some lack alternative sources of information, but to a greater extent, the Ukrainian society, having entered a new stage of political history, seems not to be ready so soon to part with the long-cherished ideas and aspirations and does not want to turn back to the recent past. Instead, Ukraine has not yet experienced living on the other side of the "Cold Curtain". People say the grass is always greener on the other side. So, Ukraine seems still to be ready to take risks.

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## POLISH OPINION WEEKLIES ABOUT BREXIT IN 2015 AND 2016

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**Abstract:** *The aim of the article is to define the way in which Brexit referendum is presented by six Polish opinion weeklies (in 2015 and 2016) with the highest level of sales in 2015 and 2016 (Do Rzeczy, Gazeta Polska, Gość Niedzielny, Newsweek, Polityka, W Sieci). The study was prepared using qualitative content analysis. In the course of the analysis, answers were searched for questions concerning the following issues: the causes of Brexit indicated in articles, its consequences for the international arena, Poland and the European Union itself, and its assessment in the analysed weeklies. The research proved the connection between the assessment of this event in the weeklies and their political affiliations. This correlation can be seen, for example, in the editorial boards' stance towards Brexit, which was positive in right-wing titles (Do Rzeczy, Gazeta Polska, Gość Niedzielny, W Sieci) and negative in the magazines supporting Civic Platform (Polityka, Newsweek). However, no significant differences were found as regards the causes and effects of Brexit identified by the editorial boards. Regardless of political affiliations, journalistic materials indicated the same main reasons and the most important consequences of Britain's leaving the European Union. However, they were hierarchised differently and assigned a different rank.*

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**Keywords:** referendum, European Union, Polish opinion weeklies, Brexit, content analysis.

### Introduction

The vote on the UK's stay in the EU in 2016 was one of the most important events for the European integration process from the beginning of the Communities. The nationwide referendum on integration was not anything new – by 2016 nearly 60 had been conducted (Musiał-Karg, 2016,

p. 79). However, the preceding debate, the result of the referendum, and above all the consequences of the British decision made EU face the need to take action to change the organisation itself. The uniqueness of the event is related to the fact that so far none of the Member States has decided to leave the EU.

The final decision of the British interested all Europe, culminating in June, the month of the referendum (Europe Direct, 2016, p. 13)<sup>2</sup>. The significance of this topic can be demonstrated by the fact that in the majority of the articles analysed herein (with the exception of *W Sieci*<sup>3</sup>) it was on the cover.

The article presents the results of the author's own research concerning the presentation of Brexit and the attitude taken by Polish opinion weeklies towards it. The introduction to the discussion is the part about the methodology of the research. The research problem selected for the analysis required supplementing it with information on the opinion weeklies market in Poland. This characteristics provided the context necessary to understand the subject. The following parts of the article present the results of the qualitative content analysis, which allowed to determine the reasons and consequences of Brexit indicated by the editorial boards, as well as to determine the attitude of the magazines towards it.

### **Methodological assumptions**

The purpose of the paper is to determine the presentation of Brexit by Polish weeklies. In the course of the analysis, answers to the following research questions were sought:

- what reasons for Brexit were indicated in the articles?
- what consequences of Brexit are expected in the analysed titles?
- what is the relation of the magazines to Brexit?

The study was prepared using a qualitative content analysis – a research method allowing to determine what arguments, threads were taken, how the issues were presented and to what determinations the individual editors came (Kafel, 1969, 111)<sup>4</sup>.

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<sup>2</sup> For example information on the most popular topics of inquiries addressed to Europe Direct can be recalled. In June 2016, the theme of Britain's exit from the EU appeared most often.

<sup>3</sup> Information about the referendum was on the cover, but it was not the subject of the issue.

<sup>4</sup> M. Kafel pointed out these qualities of qualitative content analysis: „it is not so much to explain to us the quantitative proportions of the press material, what to show what the newspaper and its creators wanted to communicate to their readers’ (Kafel 1969: 111).

The analysis comprised all issues of six Polish opinion weeklies with the highest sales in 2015 and 2016 (*Do Rzeczy*, *Gazeta Polska*, *Gość Niedzielny*, *Newsweek*, *Polityka*, *W Sieci*)<sup>5</sup> – 623 issues in total. Investigating journalistic materials from opinion weeklies was justified by the fact that, alongside dailies, they play an important role in forming public opinion “due to their specific nature that is the analytical character of publications, enabling full presentation of a particular phenomenon or event and the widespread circulation of opinions expressed there in other media, including electronic ones”. (Stasiak-Jazukiewicz, 2015, 69–70).

Examined Items were selected on the basis of the subject matter criterion. We selected those in which Brexit was the leading topic. On this basis, 80 articles were qualified for the analysis (Table 1). A thematic categorization key was prepared for the needs of the study and the empirical material was developed using the ATLAS.ti program.

Table 1: Number of articles on Brexit in weeklies in 2015 and 2016

	<i>Do Rzeczy</i>	<i>Gazeta Polska</i>	<i>Gość Niedzielny</i>	<i>Newsweek</i>	<i>Polityka</i>	<i>W Sieci</i>	<b>Total</b>
<b>Number of articles</b>	17	14	13	12	16	18	80
<b>Number of issues</b>	103	104	103	104	105	104	623

Source: own study.

### **The context of the research – a description of the opinion weeklies market in Poland**

The media market in Poland is relatively large, which makes it “pluralistic, more diversified and competitive”. (Dobek-Ostrowska, 2015, 36). Its characteristic features are high competition between publishers, as well as significant politicisation observed in both private and public media (Reuters Institute, 2017, 84). A high degree of political polarisation is particularly noticeable in the case of opinion weeklies, whose editorial offices are ideologically involved. This is reflected in the supportive attitude towards one of the two main political parties in Poland, which

<sup>5</sup> <http://www.wirtualnemedial.pl/artykul/gosc-niedzielny-na-czele-sprzedazy-tygodnikow-opinii-w-i-polroczu-2016-wprost-z-najwiekszym-spadkiem> (10.07.2017).

are: Law and Justice (Prawo i Sprawiedliwość: right-wing, conservative, national) and Civic Platform (Platforma Obywatelska: centre-right, liberal-conservative). A typical feature of the Polish media market is also the high degree of ownership concentration and domination of German corporations. However, the dominance of foreign capital does not refer to the opinion weeklies market in Poland, which was controlled by Polish capital.

The weeklies selected for the analysis have different political affiliations, as well as different histories. The oldest of the magazines is *Gość Niedzielny*. The first issue of this Catholic weekly was published on 9th September 1923 and has been associated with the Metropolitan Curia in Katowice since its beginning. The subject matter presented in the magazine is related to its publisher. It publishes articles dealing with faith, the life of the Church, social and economic analyses, presentation of scientific and cultural issues (*Gość Niedzielny*, WWW). Due to its history and the publisher, this title is identified with the right wing of the political scene in Poland. In the group of the weekly magazines selected for the analysis, right-wing affiliations are also attributed to three other titles: *Gazeta Polska* (right-wing conservative profile), *W Sieci* and *Do Rzeczy* (both are conservative-liberal).

The last two magazines were created due to a conflict within the previously existing right-wing, conservative weekly *Uważam Rze*, as a result of which some journalists were made redundant and some of them left the magazine themselves. *W Sieci* and *Do Rzeczy* present an editorial policy related to Law and Justice (PiS); moreover, these magazines are characterised by the so-called identity journalism, whose main task is “not to inform, but to integrate and mobilise supporters of a particular political option”. (Brzoza, Kornacka-Grzonka, 2017, 115). What is interesting, both titles compete with each other for the interest of readers and treat each other as competitive magazines.

The first issue of *W Sieci*<sup>6</sup> was published on 26th November 2012 and the publisher of the magazine was the Fratria company. From the very beginning, the magazine held a stand in opposition to the Civic Platform, which was in power at that time. According to the declaration of the editor-in-chief, Jacek Karnowski, *W Sieci* was to be an alternative to mainstream media, which

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<sup>6</sup> The magazine was published with the title *W Sieci* until 2017. The change of the name to *Sieci* was forced by a litigation over the rights to the title with the Spółka Gremi Media company. In the references and in the article, the title from 2016 is used.

presented reality selectively. As he pointed out, the magazine was supposed to be a forum for exchanging opinions and a place for disclosing true information (Karnowski, 2012, 3). The weekly's distinctive feature were interviews with “representatives of ideological and political groups connected with Law and Justice”. (Mielczarek, 2018, 69). A constant tendency was also to present social reality in a dichotomous way, in reference to the division into supporters and opponents of Law and Justice.

*Do Rzeczy* appeared on the Polish media market on 25th January 2013. Its publisher is the Polish Orle Pióro company. The editor-in-chief of the magazine, Paweł Lisicki, declared that the magazine was non-partisan and independent of politicians. Despite these declarations, the weekly is associated with the Law and Justice party. Politics is an area of special importance for the editorial board (Brzoza, Głuszek-Szafraniec, Szostok, 2017, 105), the journalistic materials concerning it are politicised and contain an unambiguous vision of the world and an assessment of reality. Journalists refer to the Christian tradition and emphasize the importance of economic freedom.

*Gazeta Polska* has a right-wing conservative profile. This weekly, established in March 1993, has made itself stand out on the Polish media market thanks to the creation of *Gazeta Polska Clubs* (*Kluby Gazety Polskiej*) all over Poland. They are local discussion clubs, which organise meetings with right-wing journalists, politicians and writers, as well as film showings. The clubs activate right-wing communities; this was evidenced, for example, by the monthly marches commemorating the Smolensk disaster of 2010, in which, among others, the President of Poland was killed. The reality presented by the magazine is one-dimensional, clearly excluding acceptance of different standpoints. Stanisław Pamuła described the weekly as “national, independence and patriotic; spreading Catholicism and fighting against the remnants of communism”. (Pamuła, 1996, 105–106). *Gazeta Polska* is published by Niezależne Wydawnictwo Polskie.

On the other side of the political spectrum there are two weeklies: *Polityka* and *Newsweek Polska*. The first one has a longer history. Its first issue was published on 27th February 1957. The magazine was under the control of the Polish United Workers' Party (PZPR). *Polityka* gained independence from the party in 1990. It was then that the publisher became Spółdzielnia Pracy Polityka, and since 2012 the magazine has been published by a joint-stock limited company. *Polityka's* profile is liberal-left (Zuba, 2012, 307–308). In the second decade of the 21st century, the weekly opted for the Civic Platform (Mielczarek, 2013, 88). This magazine also tries to

maintain constant contact with its readers. For this purpose, it organises Salony Polityki, which are open meetings with important figures and readers.

*Newsweek Polska* was first published on 3rd September 2001 by the German Axel Springer corporation. Since 2012, its editor-in-chief has been the well-known Polish journalist Tomasz Lis. This is one of the Polish weeklies which runs intensive promotional campaigns and tries to attract readers through supplements such as films or binders. Among other titles, it is distinguished by a higher proportion of graphic elements and photographs, as well as shorter texts; this is dictated primarily by the preferences of its readers, who are much younger than in the case of the other analysed magazines. *Newsweek* has unequivocal political affiliations: it is unquestionably against Law and Justice, which is regarded by the magazine as authoritarianism and a threat to the development of Poland and its international position (Brzoza, Głuszek-Szafraniec, Szostok, 2017, 102). *Newsweek* supports Civic Platform.

The interest of recipients in printed media in Poland is systematically decreasing, which was reflected in the decline in circulation and sales, including opinion weeklies (Table 2). In 2018, readers were most willing to reach for *Gość Niedzielny* (sale of 112,659 copies), published by the Polish Instytut Gość Media company. The sales of *Polityka* and *Newsweek* did not exceed 100,000 copies. The remaining opinion weeklies distributed less than 50,000 copies.

Table 2: Average one-time circulation and sales of opinion weeklies in Poland

	2015		2016		2017		2018	
Title	Average circulation	Sales	Average circulation	Sales	Average circulation	Sales	Average circulation	Sales
Gość Niedzielny	203 779	134 025	189 811	130 269	185 105	123 450	177 695	112 659
Polityka	171 516	118 949	172 197	118 419	166 268	109 105	145 196	97 436
Newsweek Polska	184814	120576	175 687	112 113	158 027	96 822	139 167	85 357
W Sieci	149 677	76 134	147 468	71 536	135 046	61 836	108 766	44 215
Do Rzeczy	119 305	55 265	112 856	53 166	107 526	42 163	90 861	34 519

Gazeta Polska	103 744	37 549	97 542	35 225	11 0671	34 289	101 682	26 854
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Source: Author's compilation based on data from Związek Kontroli Dystrybucji Prasy (Union of Press Distribution Control - ZKDP) for the years 2015-2018.

### **The causes of Brexit indicated by the weeklies**

The answer to the research question concerning the way of presenting the potential consequences of Brexit in the analysed weeklies required the identification of recurring topics in journalistic materials. All the editors claimed that the reasons for Brexit were as follows:

- David Cameron's declaration;
- British mentality and the difference between Great Britain and Continental Europe;
- reluctance towards the inflow of migrants, especially from the new EU member states (Poland);
- the specific nature of the European Union (bureaucracy, enforcing common rules);
- the attitude of the British to sovereignty.

A referendum on the future of Great Britain in the European Union was carried out in connection with Prime Minister David Cameron's declaration made in the campaign before the parliamentary elections in 2015. It was intended to help “*control the party and silence the Eurosceptics in its own ranks*” (Zła fala, 2016, p. 14) and weaken the competition from the Office of Competition and Consumer Protection of Nigel Farage (Bault, 2016a, p. 78). This assessment was shared by the authors of all the analysed papers. They agreed that the internal dispute in the Tory party was transformed into conflict, “*which the whole of Europe had to deal with*” (Rokita, 2016b, p. 70) and the member states became its hostages (Szostkiewicz, 2016, p. 8). Cameron has for the sake of domestic politics „*arranged a great international spectacle, blackmailing the whole of Europe with the fact that if it does not give him support now, England will begin the process of demolition and decomposition of the internal EU*” (Rokita, 2016b, p. 70).

All editors agreed that the decision to vote for leaving the EU was influenced by the mentality of the British and the dissimilarity of Great Britain from continental Europe, from which it differs in “*almost everything: from the system of measurements, direction of the road, power*



*sockets to the understanding of law and parliamentarism, as well as the role that individual states play in a united Europe” (Dziedzina, 2016d).*

*Newsweek* was the title highlighting this issue. For example, in an interview Radosław Sikorski noticed that British politicians, even pro-European, distanced themselves from the Union: *“they did not talk about the EU as we, only as they and acted on the international arena with regard to national policy only“ (Zła fala, 2016, p. 14).* Also ordinary citizens did not feel European, they did not have the sense of belonging to the EU and did not have knowledge (*“any idea”*) about it, they did not understand this project (*Piwo wygrało, 2016, p. 23*) and they preferred to *„live in an English way” (Anglicy nie są baranami, 2016, p. 24).* The British *„considered the idea of even closer integration utopian and ridiculous” (Katastrofa w cieniu, 2016, p. 24).* According to the articles, the British long for the time when their state was an important player on the international arena and think that the way to regaining its former splendour is to shed *„the EU yoke” (Nowicki, 2016),* in accordance with the principle of *„Commonwealth against the European Union” (Piwo wygrało, 2016, p. 23).*

This assessment is also similar to the one contained in the *Polityka* publications. It pointed out that the British reluctance towards the EU results not only from nostalgia for magnificence times, but is related to the fear of losing sovereignty and pounds, *„in exchange for the invasion of metric measures and weights”.* In the opinion of Marek Ostrowski, this allows the statement that the British *„are born with some existential distrust of the continent” (Ostrowski, 2016, p. 14)* they *never considered themselves „part of Europe, but its neighbour” (Ostrowski, 2015, p. 55).* Only on the pages of this title before the referendum the opinion could be found that, paradoxically, common sense in public life will persuade the British to stay in the EU (Szostkiewicz, 2016, p. 8).

The subject matter was presented in a different way by the editorial offices of *Gość Niedzielny, Gazeta Polska, W Sieci* and *Do Rzeczy*. These titles underlined British Euroscepticism, which is *„part of British DNA, a way of thinking about the world and about themselves” (Dziedzina, 2016c).* It was assessed that anti-EU attitudes refer to emotions, as opposed to the cold calculation of supporters of integration. That is why *„nobody will run to the barricades to fight for Brussels” (Lisicki, 2016a, p. 3).* In the opinion of a journalist of *Gość Niedzielny*, the British had to decide in a referendum whether *„it pays to continue to pretend to be Europeans, or if they prefer to become what they really are: the British” (Dziedzina, 2016c.* See also: Karnowski, 2016c, p. 17; Bender, 2016, p. 14).

In the opinion of some editors, social processes influenced the results of the referendum. Tomasz Lis in *Newsweek* argued that one of them consisted in a rebellion against the elite and mainstream. The accumulation of bad emotions towards the elite – disappointment, frustration – was treated as a time bomb, a threat greater than the Islamic state or immigrants. He sought negative reasons in social inequalities, populism, xenophobia and nationalism (Lis, 2016c, p. 3). A similar opinion was formulated by political scientist Ivan Krastev, for whom the emotions and lack of trust in experts and the government influenced the decision of the British (*Kiedy niemożliwe*, 2016, p. 20).

This issue was analysed in the pages of the weekly *Do Rzeczy*, which drew attention to the division of societies into ordinary citizens and the political elite. The former, wanting to “reasonably manage their freedom” (*Brexit jest blisko*, 2016, p. 96), voted for Brexit because they had “enough of deciding for them and treating ordinary people as disabled, immature children of special care, which are best taken care of by EU commissioners faraway. The times of partiocracy and expertocracy have ended” (Lisicki, 2016a, p. 3)<sup>7</sup>. In *Gość Niedzielny* this rebellion was identified as the debate on topics important for Europe (Nowak, 2016).

The influx of migrants was one of the most important reasons for Brexit. Some of the weeklies have embedded this topic in a historical context. And so, *Gość Niedzielny* reminded its readers that “Britain for decades has been after all the destination of immigration from countries that were once British colonies” (Dziedzina, 2016a). In *Polityka*, however, attention was drawn to the fact that the unwillingness to immigrants is nothing new: “When the war was not over by Christmas, British revenge in 1914 hit German immigrants: dachshunds were kicked in the streets, German children's nurses were abused and Beethoven's concerts were cancelled” (Rybarczyk, 2016, p. 49). As assessed in the same text “the British like Dr Jekyll and Mr Hyde alternately received immigrants with open arms and then choked again with their influx” (Rybarczyk, 2016, p. 49).

The reluctance towards immigrants in the opinion of *Gazeta Polska* resulted from the threat of security: “crime among the Muslim minority is disproportionately high in relation to its number,

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<sup>7</sup> In another of the texts in the weekly, rebellion against the elites was considered not only a European-wide, but also a global phenomenon (Przybylski, 2016a, p. 20).

*and the list of the most dangerous British cities almost exactly matches the list of cities with the largest population of Muslims” (Młynarz, 2016a, p. 23).*

In *Gazeta Polska* and *Do Rzeczy*, it was also emphasized that the attitude towards immigrants was different in individual social classes: *“Hundreds of thousands of people come to the Islands every year. It gets dense, crowded, public services are overloaded. Thanks to this, GDP is growing, the elite and business are enjoying, but ordinary people, especially the less educated, have problems” (Karnowski, 2016c, p. 17).*

Typical Dave and Jessica for *“failures blame others, for example »immigrants« stealing work” (Młynarz, 2016c, p. 13)*, they have more contact with immigrants, in connection with the influx of immigrants, it is harder for them to find a job or their earnings are reduced (Wawrzyński, 2016, p. 65).

Jacek Dziedzina in *Gość Niedzielny*, assessing the attitude towards immigrants, concluded that the restrictions on their inflow would not change anything in the British realities, because *“British society is already so multiethnic and multireligious that closing the borders is not able to change it” (Dziedzina, 2016a).*

All editors reminded the readers that the fear of immigrants concerns newcomers from the new Member States, also, and even above all, Poles, who, according to the reports, were *“yapping” “around the clock” (Piwo wygrało, 2016, p. 23. See also: Bault, 2016a, p. 78, Hołdyńska, 2016, p. 24)* and supposed to *„take away work and be lazy burdening the British budget for social welfare” (Przybylski, 2016, p. 25. See also Ostrowski, 2016, p. 14)*, they *“were also the largest group of immigrants in British prisons” (Baczyński, 2016a, p. 6).* *Polityka* pointed out to a paradox – *“most of the arguments used in the British debate by the supporters of Brexit are like a mirror reflection of our arguments against the invasion of Pakis; but this time in the role of Pakis we see Poles” (Baczyński, 2016a, p. 6).* Focusing reluctance on Poles was explained by the fact that political correctness *“does not allow (...) to curse without being racist on migrants from the Third World”, in contrast to visitors from the Union, the criticism of whom “is less reprehensible, serves as a smokescreen for the aversion to colourful immigration” (Ostrowski, 2015, p. 55).*

Among the reasons for the victory of the supporters of Brexit, some of the weeklies saw the media. This issue was strongly emphasized in *Newsweek*. One of the experts said that *“tabloids have led to Brexit. With the passivity of politicians who did not want to rectify these monstrous*

*lies*” (*Piwo wygrało*, 2016, p. 23)<sup>8</sup>. According to the editor-in-chief’s opinion, the boulevard press used demagoguery, which infected the minds of “*millions*” and brought the public debate to a spectacle of “*wrestling in jelly*”. The media heated up the emotions and underlined the voice of „those who shout louder, lie more effectively, cheat more efficiently” (Lis, 2016c, p. 3). As a result, the media presented “*absurd*” allegations against the EU, such as the statement of Boris Johnson, according to which it would “*not allow children under the age of eight to blow balloons, it would prohibit the recycling of tea in sachets and demand the standardization of coffins*” (Nowicki, 2016). Tomasz Lis stated that even the BBC reduced its role to “*pseudo-objective recording of statements without verification of facts and arguments*” (Lis, 2016d, p. 2). However, he avoids assessing whether the role of the media was decisive (Lis, 2016c, p. 3).

The impact of the media was also highlighted in *Polityka*. According to the assessment cited therein, the support of *The Sun* could have brought half a million votes to Brexit supporters (Wójcik, 2016, p. 13). In the assessment of the title, the influence of the media concerned “*average citizens*” – “*tabloid victims*”. Ryszard Czarnecki in *Do Rzeczy* also drew attention to the way information was presented. According to him, the media were tracking and describing EU absurdities, e.g. “*banana curvature*”, but they did not indicate the real reasons for regulations. However, he considered the assignment of guilt to Brexit tabloid as an extreme simplification (*Podwójna gra Berlina*, 2016, p. 14. See also: *Piwo wygrało*, 2016, p. 22).

The British animosities to the states determining the operation of EU – Germany and France – could also influence the decision to vote in favour of leaving the EU, according to *Gazeta Polska*. Wiktor Młynarz argued that the unwillingness to France is understandable and goes back to the disintegration of the Roman Empire. On the other hand, in the case of Germany, world wars play an important role, in particular WW2: “*The memory of the battle for Britain and the German bombings of London is still very much alive in society. Many Britons are annoyed by the fact that despite the victory in the war, it is not Britain, but Germany that seems to be playing a leading role in Europe*” (Młynarz, 2016a, p. 23). One of the experts, prof. Bernd Lucke, said that France and Germany would recognize themselves as “EU motors”, while ignoring the will of other countries. He regarded the impact of Germany on the EU as negative and defined its policy as “a

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<sup>8</sup> As an example, the method of presentation of migration flows, in which populist propaganda dominated, was indicated. A similar assessment was presented in *Brexit nie jest lekiem na zło*, 2016, p. 86.

*series of dramatic errors combined with arrogance*” (*Ten plan to prosta droga*, 2016, p. 9). The author of the publication in *Gość Niedzielny* also drew attention to the position of Germany in the EU. In his opinion, the EU is the “*emanation of German interests*”, which is reflected in the law. He considered this a normal situation, because Germany pays the most to the EU budget (Dziedzina, 2016c).

The specificity of the EU is the reason for the victory of Brexit supporters which was indicated by all editors. *Gazeta Polska*, *Gość Niedzielny*, *W sieci* and also *Newsweek* emphasized that the EU has nothing in common with the cooperation framework defined at the beginning of integration. The difference is so important that, as was written in *Newsweek*: “*if in 1975 Europe looked like the European Union today, most Britons would certainly not vote for the membership. The English think: »We entered a club, but this club has changed. EEC suited us, and the more integrated Union no longer suits us«.*” (*Anglicy nie są baranami*, 2016, p. 24).

In the opinion of Jacek Wolski in *Gazeta Polska*, the level and direction of integration is not in line with the expectations of citizens: “*We wanted freedom of travel, trade, cultural exchange, discussion about ideas... We got another Council for Mutual Economic Assistance, with ambitions to regulate all areas of our lives. From the kitchen to the bed. We wanted a world of diversity, we were imposed a unified model born in the minds of modern Euro-politicians, eagerly teaching other countries what democracy and civil liberties are as well as imposing them*” (Wolski 2016: 2).

All this makes the EU in the article *W Sieci* described as an “*oppressive utopia*”, not a community that aims to “*facilitate trade, open borders and strengthen security*” (Karnowski, 2016b, p. 17). Such EU, instead of „being a zone of freedom, prosperity and solidarity” became, in the opinion of the journalist of *Gość Niedzielny*, “*a bureaucratic creation, serving as a tool for stronger domination and for the empowerment of weaker members*” (Dziedzina, 2016a) imposing “*various solutions, unfavourable for all countries, even the quotas of immigrants*” (*Jest życie poza Unią*, 2016). Similarly, the unwillingness was aroused by the number of „*economically and politically harmful regulations*” reaching the “*limits of the absurd*” and inhibiting the development of the EU and Great Britain (*Jest życie poza Unią*, 2016. See also: J. Dziedzina, 2016b).

The method of making decisions in the EU was also subject of the critics. *Do Rzeczy* proves that it limits “*the sovereignty of nations and the field of operation of democratically elected*

*national authorities*” (Bault, 2016b, p. 23) and as a result a system is created in which democracy serves as a facade (Lisicki, 2016a, p. 3). The result of the referendum should be treated as an objection to *“the way the current Eurocrats manage the Union”* and the *“usurpation and arrogance of the European Commission”* (Lisicki, 2016a, p. 3)<sup>9</sup>. What is important in this context for Jacek Karnowski was also the lack of legitimacy of the authorities (Karnowski, 2016c, p. 17). In *Gość Niedzielny*, it was recognized that the EU is *“centrally controlled, bureaucratized and undemocratic”* (Dziedzina, 2015), which led to the rebellion of the most conscious nations (Dziedzina, 2016c).

In the article in *W Sieci* Andrzej Zybertowicz has recapitulated allegations against the EU. He estimated that: *“The set of the actual principles according to which the Union operates should be supplemented by: elitism, bureaucratism, poor transparency of decision-making processes, democratic deficit, violation of solidarity rules between member countries (see Nord Stream), hegemony of the strongest and perverted tolerance resulting, inter alia, in undermining the deep foundations of culture”* (Zybertowicz, 2016, p. 98).

The importance of the sovereignty of states in British political culture was another of the indicated reasons for leaving the EU. In the opinion of *W Sieci*, the British *“love their homeland and want to rule in it alone and sovereignly”* (Grzybowska, 2016, p. 91) and the unwillingness to the EU is inscribed in British DNA, which caused the collision of *“British culture of sovereignty with the Brussels undemocratic bureaucracy”* (Karnowski, 2016c, p. 17).

According to the expert in *Newsweek*, sovereignty gains importance, because globalization has led to the situation when we do not know *“who controls what”* (Kiedy niemożliwe, 2016, p. 20). British »no« for the EU can strengthen the process of renationalising policy in the region and encourage other Member States to formulate demands for the EU (Lis, 2016a, p. 2). The editor-in-chief of the magazine reflects on what sovereignty is and how to define it. He asks rhetorical questions that suggest that it consists in the ability to secure one's own interests while looking for compromises within the community, not in an *“absolute independence”* (Lis, 2016b, p. 2).

The attitude to the role of nation states in the EU in the assessment of *Gazeta Polska* is strongly related to the vision of Europe and the values to which it should refer: *“Our vision of*

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<sup>9</sup> The responsibility of arrogant bureaucrats is also described by: Karłowicz 2016: 69. See also: *Polexitu nie będzie* 2016: 16.



*Europe means freedom for its inhabitants to travel, work, the freedom of the flow of capital, but without any attempt to dominate and the respect for national identities” (Sakiewicz, 2016, p. 2).*

In the pages of *Do Rzeczy* it was recognized that the British, voting in favour of Brexit, voted for sovereignty, which, despite being ridiculed, did not lose its attractiveness for the citizen (Lisicki, 2016a, p. 3) thinking that *“it is necessary to regain our country, free it from the power of Brussels”* (Stylińska, 2016, p. 76). As it was proved, the turn towards sovereignty resulted from the wrong actions of Euro-enthusiasts who wanted to deepen cooperation in the EU: *„The genie has now been released from the bottle, it is already in Europe. And euro-enthusiasts let him out. All these »deepeners«, »wideners« and »accelerators« of the EU – well-paid professional euro-enthusiasts and amateurs convinced of the validity of their views. All those creators of the United States of Europe, supporters of driving EU countries into the trap of the common currency, enthusiasts of ever faster dismantling of nation states by taking away from them attributes of the sovereign state by the non-democratic European Commission”* (Gabryel, 2016, p. 85).

The author of the above-mentioned article suggests that support for the European project would be different if, in accordance with the suggestions of the Eurorealists, the widening of the cooperation was abolished and the nation states were not marginalized. Another author even acknowledges that *“Poland has a chance to become the leader of the »eurorealist« camp, i.e. the camp of those who want the European Union to exist, but with greater respect for the sovereignty of nation states”* (Bault, 2016b, p. 22). In *Gość Niedzielny* it was argued that even the most pro-European British politicians in the 1970s *“never wanted to hear about limiting their sovereignty, that is, giving essential competence to the Community institutions”* (Dziedzina, 2016b). The very possibility of deciding on the future in the EU structures was recognized in the letter as a condition of *“independence”* (Nowak, 2016).

The analysis of the reasons for Brexit indicated by the editorial boards led to the identification of a catalogue of five reasons, appearing in all the weeklies. These included David Cameron's declaration, the mentality of the British and the distinctiveness of Great Britain, reluctance towards the inflow of migrants, the specific nature of the EU and the attitude of the British people towards sovereignty. Each of the editors ranked the above issues differently. For example, the attitude of the British towards sovereignty and negative opinion on the specific nature of the EU were highlighted in right-wing magazines (*Gazeta Polska, Gość Niedzielny, Do Rzeczy, W Sieci*). Additionally, in these magazines attention was drawn to the issues of animosity between



Great Britain as opposed to Germany and France, which, according to the editorial board's judgement, could have an impact on the result of the referendum. In the case of those weeklies which share their world view with Civic Platform, the issue of mutual animosities of the member states was not raised in the context of Brexit. These magazines considered the British media as “complicit” in Brexit (*Polityka, Newsweek*).

### **The consequences of Brexit predicted by the editorial offices**

All editors answered the question concerning the consequences of Brexit<sup>10</sup>. Among the common catalogue of expected consequences, they indicated: a change in the balance of power on the international arena, including the strengthening of Russia's position; a change in Poland's situation in Europe; and potential consequences for the EU itself.

The most important consisted in the change in Russia's position in the international arena and the attitude of that country to the result of the referendum. This issue was strongly emphasized by *Gazeta Polska*. One of the texts stressed that the UK's stay in the EU would secure the interests of the Member States: “*Divide et impera - it has been known for a long time that Putin has taken this maxim to heart. And although the Union is a very flawed organization that is not always heading in the right direction, a united Europe can oppose Russia's imperial attempts more easily than individual states which a politician as effective as Putin can easily play upon*” (Młynarz, 2016a, p. 23).

It was estimated that the EU and the United Kingdom guaranteed sanctions against Russia and Brexit could make the organization more pro-Russian (Młynarz, 2016b, p. 19)<sup>11</sup>.

Tomasz Lis in *Newsweek*, on the other hand, assessed that if the UK were to leave the EU, “*all nationalists, populists and putinists in Europe would be satisfied. Anyone supports the Brexit supporters more than the Russian president*” (Lis, 2016b, p. 2). Radosław Sikorski in an interview for the same title stated that „*President Putin just dreamed about it – to be able to play European countries one by one and not negotiate with us as a whole*”. Russia, in his opinion, treats Brexit as a “*rematch for the collapse of the USSR*” (Zła fala, 2016, p. 16).

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<sup>10</sup> The study deliberately omits the effects of Brexit for Great Britain, due to the lack of differences in the way they are presented in the analysed writings.

<sup>11</sup> A similar assessment was presented in Czarnecki 2016: 19.

In *W Sieci*, UK's exit from the EU was described as an event threatening European unity and “*strengthening Russia's position. Because the potential difference between Moscow and individual European countries is greater than between Russia and the sum of these countries*” (Skwieciński, 2016, p. 3). Bronisław Wildstein, despite the criticism of the EU, considered it “*a centre of resistance against Moscow's imperial tendencies*” (Wildstein, 2016, p. 27).

“*Putin's Russia*” together with nationalists in the EU work together to “*lead to the breakup of the Union*”, argued Adam Szostkiewicz in *Polityka*. In the journalist's opinion, Russia takes these actions despite the fact that “*the collapse of the Union makes Europe weaker because it puts it to the grip of national egoisms*”, which led to two world wars. The Union for the journalist is “*a guarantee of peace, democracy and development*” (Szostkiewicz, 2016, p. 8).

An assessment of relations with Russia is slightly different in the *Gość Niedzielny*. “*Moscow perfectly plays intra-EU divisions and the breakup of the Union would be the most wonderful gift for it*”, but it was recognized that the EU does not guarantee any protection: “*Does the European Union in any way – except for temporary and minor sanctions – threaten the interests of Russia? On the contrary, the construction of the second branch of the Nord Stream gas pipeline has shown that Russia can get along with Western Europe over the interests of the Central European community members.*” (Dziedzina, 2016d).

The position of Germany in the EU was another of the themes related to the situation on the international scene. In two of the analysed weeklies, the possible increase in their importance was assessed negatively. In *Gazeta Polska*, it was recognized that “*Berlin will want to close Europe and destroy nation-states*” (Sakiewicz, 2016, p. 2), striving to strengthen its position (Młynarz, 2016c, p. 13). This concept will not be conducted, which was assessed positively: “*I am not afraid of »Carolingian Europe«, a great Germany with a French sidekick. This project is dying before our eyes. And very good!*” (Wolski, 2016, p. 2) Germany's policy will only lead to further EU crises.

In the opinion of Jan Rokita in *W Sieci*, Brexit will make the EU “*more German*”, which will be more important for the future of Europe than financial issues or the influx of immigrants (Rokita 2016a, p. 85). The exit from the EU of Great Britain was seen as the next phase of “*integration that turns out to be the path to German hegemony*”. Other Member States will not agree to this scenario, which may lead to the collapse of the European project (Wildstein 2016, p. 27). Another scenario was presented by Grzegorz Kostrzewa-Zorbas, for whom the United

Kingdom constituted a counterbalance for Germany and France and without it the founding countries would strengthen the leadership and “*return to the project of building a common federal state forever*” (Kostrzewa-Zorbas, 2016, p. 19). The opinion regarding the growth of the role of Germany in the EU in the magazine is not the only one. Jan Rokita recognized that in the case of Brexit, it would be “*Latin America rather than Berlin that would force its vision of the European order*” (Rokita, 2015, p. 92).

Brexit will lead to a change in the European Union and will also re-define Poland's position. This issue was dealt with by all editors, particularly accented in the pages of *W Sieci*, *Do Rzeczy* and *Polityka*.

Ryszard Legutko in *W Sieci* stated that Brexit will be a historic opportunity for Poland, it will also increase our country's responsibility for the future of the EU (*Polexitu nie będzie*, 2016: 16). The article *Polska ofensywa* also mentioned it. Its author, Bronisław Janecki, argued that Poland would become “*the second largest and strongest member state that opposes the evolution of the community towards a superstate*”. Thus it will be the successor of Great Britain in the EU (Janecki, 2016: 22). Poland will have the opportunity to counteract “*federalist, German-French tendencies*” (Wildstein, 2016, p. 27).

In turn, in the opinion of Ryszard Czarnecki, who gave the interview to *Do Rzeczy*, this opportunity is connected with the possibility of reforming the EU. MEP agreed that only one concept is right – the one of Jarosław Kaczyński, “*who has the courage to propose concrete changes and fight for a greater influence of Poland on EU policy, every Pole in charge of national interest will choose the PiS leader. Today, together with Kaczyński, we cannot refuse responsibility for fighting for the Polish cause on the international arena and for influencing the shape of Europe that would make of the EU a structure much closer to the Europe of the Nations than one federal superstate*” (*Podwójna gra Berlina*, 2016, p. 18).

Matthew Tyrmand treats Britain's exit from the EU as a chance as well. In his opinion, Poland should build geopolitical alliances with the Baltic states and the countries of Central and Eastern Europe. Then the “*idea of Intermarium has a chance to finally blossom thanks to the EU shock therapy*” (Tyrmand, 2016, p. 98. See also: Nowak, 2016). This concept is not shared by the editor-in-chief Paweł Lisicki, for whom “*the tales in which now Poland is promoted to the role of the European leader sound little serious*” (Lisicki, 2016b, p. 3).

The critical assessment of the situation of Poland after Brexit was included in the *Polityka* publications. Even before the referendum many journalists warned that Poland would remain outside the mainstream, almost like Belarus: *“We will find ourselves in a situation that we wanted to avoid and we should always be afraid: neither with the West nor with Russia – in a grey area”* (Ostrowski, 2016, p. 14). For this reason, and also because of the benefits of EU membership, *“cheering on Brexit and dreaming about Europe of sovereign homelands, watching primarily their own national interest, is a historical and geopolitical nonsense”* (Baczyński, 2016a, p. 6). Brexit will re-define relations in the European arena, and *“Poland, with its increasingly weak position in the Union, would be, unfortunately, among those being aligned rather than aligning”* (Baczyński, 2016a, p. 6). A similar assessment in the interview was expressed by Radosław Sikorski: *“At the time of the attempt, when the EU will be redefined anew, no one will call Warsaw asking what its idea for the current crisis is”* (Zła fala, 2016, p. 16).

The publications in *Gazeta Polska* also treated on the position of Poland. It was pointed out that Brexit on the one hand would mean an increase in the importance of the *“Paris-Berlin-Brussels axis”* at the expense of the Visegrad Group (Młynarz, 2016c, p. 13), on the other *“it could be a chance for Poland to be an important EU country, a partner of the US and Great Britain and an integrator of Central Europe”* (Sakiewicz, 2016, p. 2).

What does Britain mean for the EU itself? This question is answered by all of the analysed weeklies. In *Gazeta Polska*, it was assessed that if the option to leave the EU wins, *“the old continent will be in great trouble”*, and only shock therapy can save it, otherwise *“the new migration of peoples will plunge it into the darkness of the Islamic Middle Ages”* (Wolski, 2016, p. 2). The combat metaphor also appears in another of the texts: *“Paraphrasing Churchill – the battle for Britain is almost over, the battle for Europe begins”* (Młynarz, 2016c, p. 13). The article also points to EU budget issues – the exit of the United Kingdom may mean *“reduction of EU spending, which will only strengthen EU opponents, or more spending on the common budget”* (Młynarz, 2016c, p. 13).

In *Newsweek* it was noted that Brexit may initiate further cracks in the structure, and *“eventually the whole project may collapse”*. The editor-in-chief concludes that the EU will seek rescue in the so-called *“escaping forward”* or accelerated integration (Lis, 2016a, p. 2). According to the concept presented in the magazine, Brexit is another crisis situation in the EU, which will check the ability of this organization to adapt and survive: *“EU legitimacy will no longer depend,*

*for example, on whether it is democratic enough, or whether it has the ability to survive. People believe in their nation-states because they have endured countless storms throughout the centuries. And if the Union succeeds, they will believe in it. As Rainer Maria Rilke wrote: »Who speaks of victory? To endure is all«” (Kiedy niemożliwe, 2016, p. 20).*

In the interview Iwan Krastew notes that Brexit is also done in the minds of people. Brexit will have not only economic or institutional, but also psychological consequences.

For the editor-in-chief of *Do Rzeczy*, Brexit does not entail a return “to the idea of sovereign states”, but it will lead to “tightening the screw” and “faster integration”, centralization of the EU and limiting the role of nation states (Lisicki, 2016a, p. 3). He describes this as “putting out fire with gasoline”, because despite the British opposition to the “ubiquity and guardianship of the Union, the Union responds: we will control even more, we will leave even less liberty” (Lisicki 2016b, p. 3). A similar opinion was formulated by Ryszard Legutko – “the idea of putting the pedal to of centralization, federalization and unanimity to the metal will win after Brexit” (*Polexitu nie będzie*, 2016, p. 16). Attention was also drawn to the fact that EU actions – limiting the role of nation states, a large number of regulations, too fast integration – threaten the existence of the Union (Gabryel, 2016, p. 85). Brexit, however, may be an impulse “for internal reform, because the Union with the current elites, those who mock the »will of the people«, will either reform or cease to exist” (Tyrmant, 2016, p. 95). Czarnecki assessed the situation similarly. He drew attention to the possibility of establishing in the EU structures “the top of the richest countries, which will get rid of ballast, such as Poland, and will not have to »die for Gdańsk«, which means in the new formula »pay for the metro in Warsaw«. It may repay in the short term, but it will be a spectacular end to European solidarity, which was the foundation of the European Coal and Steel Community, and later the EEC. I believe that Robert Schuman and Alcide De Gasperi would be devastated if they saw what we are doing today with their heritage” (*Podwójna gra Berlina*, 2016, p. 20).

For Jacek Przybylski, the EU reform after Brexit will ensure not only the survival of the organization, but also its strengthening (Przybylski, 2016a, p. 19). We can deal with such a scenario, when, as the other author proves, proposals of Kaczyński for the reform of the treaties are implemented, which are “the most realistic and constructive after the British decision, because they take into account the will of the majority of European societies” (Bault, 2016b, p. 23). This opinion is shared by Czarnecki (*Podwójna gra Berlina*, 2016, p. 20).

Similar opinions are formulated in *W Sieci*. And here it was pointed out that the EU reform could be an answer to Brexit (Janecki, 2016, p. 22) but it underlined first and foremost “*escape forward*” or tightening cooperation “*towards a super-state focused around the western core*” (Karnowski, 2016a, p. 3). The evaluation of such an integration scenario is not unambiguous in the weekly. Kostrzewa-Zorba recognized that “*no loose set of countries – if the EU were to be transformed instead of closer integration - would not be able to provide lasting peace*” (Kostrzewa-Zorbas, 2016, p. 20). Piotr Skwieciński, on the other hand, assesses negatively “*escape forward*” by speeding up the integration of the “*hard core*” as it would “*de facto push out the countries from the core (...) it would also mean disintegration (because in the core countries Eurosceptic moods are growing up as well) and tightening an idealized corset demystified by Brexit for a moment*” (Skwieciński, 2016, p. 3). Dariusz Karłowicz expresses similar assumptions. In his opinion, “*Brexit is a real spectre of the beginning of the end of the entire European project*” (Karłowicz, 2016, p. 69). Such a pessimistic vision is not shared in the interview by Professor Robert Geyer. Brexit is not enough for him to cause the breakup of the EU: “*For the EU to collapse, much more than Brexit would have to happen - a sharp resumption of the immigration crisis combined with the financial crisis and the breakup of the eurozone*” (*Brexit nie jest lekiem*, 2016, p. 87).

Also, the journalists of *Gość Niedzielny* point to possible changes in the EU. According to Jacek Dziedzina, the EU will strive to strengthen cooperation, centralization, increase bureaucracy and limit the role of states. These actions are negative, because they mean “*deepening all that inevitably leads to the breakup of the European Union*” (Dziedzina, 2016a). The same author in another text suggests that the EU can survive “*in the shape that Brexit supporters suggest: a loose union of closely cooperating states*” (Dziedzina, 2016d).

The future of the EU after Brexit was also considered in *Polityka*. Jerzy Baczyński, for example, said that the scenarios “*extend today between the complete dissolution of the Union and the breakdown into segments of varying degrees of integration*” (Baczyński, 2016b, p. 6). The same author in another text considers the second scenario more likely: “*The European Union has a lot of flaws and weaknesses, but the answer to most of the crises that are upsetting it (from the debt crisis, climate crisis to immigration crisis) consists in rather more than less of the Union; better coordination and cooperation than competition for egoisms*” (Baczyński, 2016a, p. 6). The justification for choosing this alternative is found in the *Polexit* article. Marek Ostrowski drew



attention to the fact that anti-EU trends can be observed in Poland, in Romania and Bulgaria, which reinforces the view that the core of the Union can function much better without burdens. Brexit will only “*accelerate the political integration of the European Monetary Union (EMU), one of the foundations of the EU*”. As a result, Brexit will not make everything collapse “*like a house of cards. The core of the Union will behave like an anti-seismic construction. Edges will collapse*” (Ostrowski, 2016, p. 14).

The potential consequences of Brexit indicated by all the analysed weeklies included a change in the balance of power on the international arena, a change in Poland's situation in Europe and potential consequences for the EU itself. The editors agreed that Brexit would mean strengthening Russia's position on the international arena, which could pose a threat to Poland and Europe. The magazines also assessed the situation of the EU after Brexit in a similar way. They suggested that the British decision would force a reform of the EU. Various scenarios were presented in the weeklies, such as closer cooperation between the old member states, segmental integration, or even the disintegration of the EU. The editors, on the other hand, had different opinions on the situation of Poland after Brexit. The weeklies affiliated to the Law and Justice party (*Do Rzeczy*, *Gazeta Polska*, *Gość Niedzielny W Sieci*,) believed it could (although not unambiguously) strengthen Poland's position in the EU structures. In the case of the magazines supporting Civic Platform, Poland's situation on the European arena after Brexit was clearly assessed as negative. *Polityka* and *Newsweek* claimed that it would deteriorate due to the need to reform the European institutions and strengthen cooperation, leading to the marginalisation of the position of the new member states, including Poland.

### **Acceptance vs. Rejection - the attitude of the magazines towards Brexit**

The evaluation of the referendum result was included in all the weeklies. As a result of the content analysis, it was found that there were significant differences in the assessment of Brexit by each editorial board.

The evaluation of the referendum result was included in all weeklies. A positive attitude towards the decision of the British to leave the EU was expressed in *Gazeta Polska*. The article of Marcin Wolski was dedicated to them. He stated that “*June 24 for the great day of the victory of reason over political correctness and the nation state over the leftist utopia*” (Wolski, 2016, p. 2). In his view, the British “*unmasked a great fraud*” - the European Union. The British »no« is a



signal of changes in European and global politics, opposition to the current vision of the EU: *“The world is waking up. Of course, not everyone will like the daybreak with the face of Nigel Farage, Donald Trump or Marine le Pen, but I prefer this face rather than the round, seemingly inexpressive faces of various eurojerks, completely unnecessary Brussels leeches, preying on the free nations of our continent”* (Wolski, 2016, p. 2).

Brexit may also have negative consequences - easing sanctions against Russia and warming EU-Russia relations (Młynarz, 2016b, p. 19)<sup>12</sup>.

The result of the British referendum „is the end of Europe as we know it” (Przybylski, 2016a, p. 18), notes Jacek Przybylski on the pages of *Do Rzeczy*. According to Paweł Lisicki, the British «no» for the EU was not a hasty and ill-conceived decision (Lisicki, 2016a, p. 3) and the exit of Great Britain from the EU is associated with the limitation of sovereignty: *“The attempt to unify by force may end with the disintegration of the entire EU organism. Not only is the British not consenting to it, but it is also becoming increasingly clear that such integration by force meets the resistance of an increasing number of Europeans”* (Lisicki, 2016b, p. 3).

*“Brexit is not the end of the world”* – argues Jacek Dziedzina on the pages of *Gość Niedzielny*. The EU project *“has become a caricature of itself”*, which has discouraged the British (Dziedzina, 2016a). Andrzej Nowak assesses this issue in a similar way, he encourages *“reflection on the positive meaning of the British example”*. As he claims, when the EU does not respond to the needs of its members *“then calls for a change are appropriate and if it does not change – for secession (...) It will either help to repair this more and more ill Union, or the next secessions, and even (God forbid!) the Civil War will be inevitable”* (Nowak, 2016).

In *W Sieci* weekly the assessments of the referendum result are not expressed directly, but in the context of the sovereignty and the status of Poland in the EU. Jacek Karnowski recognized that *“the British have changed the course of history again. They are a truly sovereign nation.”* (Karnowski, 2016c, p. 17). On the other hand, Michał Karnowski assessed that the project was rejected as a *“socialist”* utopia (Karnowski, 2016b, p. 17). For Bronisław Wildstein, the decision of the British means not only changes in the EU, but also opportunities for Poland (Wildstein, 2016, p. 27. See Reszczyński, 2016, p. 67).

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<sup>12</sup> A similar assessment was presented in Czarnecki 2016: 19.

*Newsweek* and *Polityka* assess Brexit unambiguously negatively, which may be testified by the cover of the first of the weeklies No. 27/2016 entitled Great Fear. For the editor-in-chief of *Newsweek*, Tomasz Lis, Brexit is the entering of the World, Europe and Poland “in the period of the greatest uncertainty since the Second World War” and the EU itself “may in a moment look like a community of desperates” (Lis, 2016c, p. 2). He criticizes the decision of the British who “acted as if they thought suicide was the best medicine for depression” (Lis, 2016c, p. 2). The topic of Brexit was also taken up by Lis in an editorial to the next issue. He considered the result of the referendum to be „the greatest triumph of falsehood, hypocrisy and ordinary stupidity, that led to the victory of lies” (Lis, 2016d, p. 2). These pessimistic assessments were shared by Agata Bielik-Robson, for whom we “stand on the verge of complete chaos” (*Piwo wygrało*, 2016, p. 23). Jacek Rostowski spoke similarly. For him, Brexit was an act of great collective irresponsibility (Brytyjczycy pożałują, 2016, p. 29). Even before the referendum one of the journalists assessed that “the jump in emptiness is presented as the best of all solutions” (Nowicki, 2016). In the pages of the magazine you can also find calming opinions. One of them was formulated by Adam Zamoyski: “it is not that we jumped out the window. Trains in the tunnel under the English Channel continue to drive. Nobody shoots to the ferries sailing from Calais to Dover. The world will not collapse” (*Anglicy nie są baranami*, 2016, p. 24).

In the pages of *Polityka* before the referendum, hopes were expressed that the British would choose to remain in the EU: “Known is usually better than the unknown. In uncertain times it is better to be together. I believe in the common sense of the British people” (Szostkiewicz, 2016, p. 8). After the failure of the supporters of remaining in the EU, the evaluation could be found in the titles of the articles themselves, e.g. “The end of the world and what next” (Baczyński, 2016b, p. 6), “It was not supposed to be like that”. In the latter, Łukasz Wójcik stated that Brexit means the defeat of David Cameron, Great Britain and the EU, but also democracy. In his opinion „the breakdown of the Union, of which Brexit would be the beginning, according to the hope of the Eurosceptics, would be able to turn our continent into a jumble of football hooligans painted in national colours shaking their batons” (Wójcik, 2016, p. 13).

Political affiliations of the weeklies were reflected in their attitude towards Brexit. *Gazeta Polska*'s publications contained an undeniably positive assessment of Brexit. The other three right-wing titles (*W Sieci*, *Do Rzeczy*, *Gość Niedzielny*) represented a standpoint that could also be

considered as favourable to Brexit, although not declared *expressis verbis*. For *Polityka* and *Newsweek* (the weeklies close to Civic Platform), Brexit ought not to happen.

### Conclusion

Despite the differences between the various magazines, all the weeklies similarly diagnosed the reasons for the victory of supporters of leaving the European Union. They pointed to Prime Minister Cameron's statements, the mentality of the British, the importance of sovereignty in the British political culture, the influx of immigrants to the United Kingdom, the specificity of the European Union.

The correspondence between the editorial offices concerned the identification of the reasons themselves; however, the assessments and interpretations of the reasons, apart from the first two, were different. For example, in articles pointing to the mentality of the British in *Polityka* and *Newsweek* the issues of the lack of membership to the EU and Commonwealth were emphasized, in other weeklies euroscepticism.

Differences were also evident in the description method. For example, the matter of opposition to the mainstream both in *Do Rzeczy* and in *Newsweek* was related to emotions or values. In the case of the first of the weeklies, it was joy, freedom and the ability to decide. For *Newsweek* journalists, however, it meant reluctance, negative attitude or rebellion. A positive presentation can also be found in publications of *Do Rzeczy*, *Gazeta Polska*, *Gość Niedzielny* and *W Sieci* discussing the importance of sovereignty for the British. In the articles, it was linked to with a system of values, independence and national identity.

The weeklies assessed that European integration looks different than at the beginning. In the case of *Do Rzeczy*, *Gazeta Polska*, *Gość Niedzielny* and *W Sieci*, the negative consequences of closer integration, such as lack of transparency of EU institutions, overregulation, bureaucracy or lack of legitimacy, were emphasized. In addition, in the case of *Gość Niedzielny*, the former position of Germany in the EU was analysed more widely.

All correspondents agreed that the inflow of immigrants to Great Britain had a significant impact on the decisions of the British. Similarly, they all noticed that the newcomers were identified with the citizens of the new Member States, including Poles. This last issue was more widely presented in *Polityka* than in the other magazines. In *Gazeta Polska*, *Do Rzeczy*, *W Sieci*, it was emphasized that the attitude towards immigrants was different in different social classes.

It is interesting that the difference in the way Brexit's causes are presented by the magazines cannot be reduced to their political affiliations. There is a correlation in exposing the issue of sovereignty and animosity between Great Britain and Germany and France in right-wing magazines (*Gazeta Polska*, *Do Rzeczy*, *W Sieci*), or in the case of the magazines closer to Civic Platform (*Polityka*, *Newsweek*), the role of the media in the pre-referendum campaign. However, the catalogue of the reasons of Brexit pointed out by the magazines is very similar. The differences lie primarily in the different rank given by the editors to particular issues.

The effects associated with the UK's exit from the EU were presented in all titles. They included, among others, the change of Russia's position in relations with the EU, the situation of Poland in the EU, the future of the EU.

All editorial offices share the view that Brexit will weaken the position of the EU and its member states in relations with Russia. They likewise emphasized that Russia is interested in such a scenario and is taking steps to implement it. The change of Germany's status in the EU was the subject of deeper reflection in *Gazeta Polska* and *W Sieci*. Both editorial offices decided that Brexit would lead to the strengthening of Germany in the EU, both assessed it negatively.

In the case of publications presenting the consequences of Brexit for Poland, the magazines can be divided into three groups. The first, which includes *Gazeta Polska*, *Gość Niedzielny* and *W Sieci*, saw in Brexit the chances for Poland to strengthen its position in the EU. However, *Polityka* and *Newsweek* believe that it will not strengthen Poland's position in the EU, Poland will not determine the direction of the organization's development. In the case of *Do Rzeczy*, the articles contain an ambivalent attitude, some journalists consider Brexit to be an opportunity for Poland, some of them undermine this view.

The analysis of the content also made it possible to see the similarity in the description of the EU's future after Brexit. Editors point out that it means a challenge for Europe. They draw attention to various possible scenarios from the collapse of the European integration project, through the acceleration of integration, the division of the various speeds into the Union to the reform of the organization.

Significant differences between weeklies can be seen in the Brexit assessment. All editors in the articles, describing the results of the referendum, emphasized that it is a danger and a threat. In the case of *Gazeta Polska*, however, this is only signalled, in the texts the recognition of the British decision prevails. Three of the analysed titles, *Do Rzeczy*, *Gość Niedzielny* and *W Sieci*

mention the threats related to Brexit, but treat it as a new opening, the possibility of reforming the institution and the way of thinking about the role of the state in the EU and opposition to limiting the sovereignty of Member States. An unambiguously negative assessment of the decision of the British is presented in *Polityka* and *Newsweek*. They treat it as ill-conceived, resulting in negative consequences and associated with uncertainty.

The qualitative analysis of the way Brexit was discussed in Polish opinion weeklies in 2015 and 2016 confirmed the link between the assessment of the event in the weeklies and their political affiliations. This correlation can be seen, for example, in the editorial boards' stance towards Brexit, which was positive in right-wing titles (*Do Rzeczy*, *Gazeta Polska*, *Gość Niedzielny*, *W Sieci*) and negative in the magazines supporting Civic Platform (*Polityka*, *Newsweek*). However, no significant differences were found as regards the causes and effects of Brexit identified by the editorial boards. Regardless of political affiliations, journalistic materials indicated the same main reasons and the most important consequences of Britain's leaving the European Union. However, they were hierarchised differently and assigned a different rank.

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## THE URBAN ELECTORAL GEOGRAPHIES OF CLUJ-NAPOCA: 1992-2016

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**Abstract:** *The present paper explores the electoral geographies in the city of Cluj-Napoca at parliamentary election between 1992-2016. Using spatial statistics, the electoral geographic patterns are analyzed at a global level (the entire city) and at a local level (neighborhoods). The longitudinal perspective is placed in a context of political, economic and social changes experienced by Cluj-Napoca during the two and a half decades. The results show stable and consistent patterns throughout the entire period. However, there are also significant geographic realignments and shifting patterns at a local level. The results also depict a strong correlation between the political, economic and social changes and the urban electoral geographies of Cluj-Napoca.*

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**Keywords:** electoral geography, urban politics, Cluj-Napoca, post-communism, Romania.

### Introduction

As the contemporary world is experiencing a planetary urbanization, many political or social processes should be more understood in association with their urban socio-spatial context (Brenner and Schmidt, 2015). The objective of this paper is to explore the spatial voting patterns in Cluj-Napoca by framing them within their urban socio-spatial context. For every parliamentary election between 1992-2016, the electoral geographies of Cluj-Napoca are analysed using spatial statistics.

Cluj-Napoca is the second largest Romanian city after the capital Bucharest. The city is a major social, cultural and economic growth pole for the country. During the last decade Cluj-Napoca had progressively become a global city. Cluj-Napoca has consistently the second share of

employees enrolled in the service sector after Bucharest. As a specificity, the city is highly specialized in information technologies. This position and development of Cluj-Napoca as a global city was only arrived at after a first decade of slow economic transition of post-communism during which the local municipality tried to preserve the city's heavy industry and continuously nurtured the nostalgia of a once great blue-collar working class. The city also has an important ethnic minority of Hungarians (23% in 1992; 16% in 2011). Historically, up until the communist regime, the Hungarians were the largest ethnic group in Cluj-Napoca (46% in 1930). Local politics were heavily influenced by the ethnic structure as the Hungarian minority almost entirely preferred voting on an ethnic basis.

The paper opens with a short description of the electoral geography subfield and its low development of studies located in an urban context. Then, attention is moved to the research setting, where different topics are discussed in three separate subsections. One part, provides the discussion regarding the political context of the electoral competition. Here are mentioned the political parties and alliances of interest in the electoral geography exploration. Further, in another section, the politics, economics and society of Cluj-Napoca are briefly discussed. Then, the research setting is described through a longitudinal analysis of the non-geographic aggregate results in Cluj-Napoca for the 1992-2016 elections. Afterwards, the discussion is moved towards describing the spatial modelling used for the exploration of electoral geographies. The rest of the article is represented by the actual exploration and analysis of electoral geographies. Firstly, a short section describes the global geographic distribution of votes for political parties and alliances of interest at every election. Subsequently, for each election, local spatial voting patterns are investigated in separate sections. Finally, some conclusions are offered about the nature of electoral geographies explored in Cluj-Napoca.

### **Urban electoral geography**

Within the field of electoral geography there are three main topics: geography of voting, geography of electoral systems and geography of malapportionment and gerrymandering (Leib and Quinton, 2011). The present paper is part and parcel of the first topic. In the past three to four decades, the research agenda within geography of voting has evolved around the question of dependency between the electoral behavior and its geographic context (Agnew, 1990; Johnston and Pattie, 2006).

The largest body of empirical and theoretical work was produced within the British and the American academic communities. The British geographer Ron Johnston and its colleagues placed the voters in their geographic context and produced an impressive series of empirical work showing how the electoral behavior is dependent upon the social construction of geographic space and the geographic structuration of social networks, canvass or economic context (Johnston and Pattie, 2006). Johnston argues that the social composition of population explains the electoral geographic patterns. A different approach started in the United States, where John Agnew (1987, 1996, 2002, 2008) proposed place-based explanations for the relationship between electoral behavior and its geographic context. In its empirical studies on Italy, Agnew showed that electoral behavior is mediated through the various social, political, economic and cultural processes acting at various geographic hierarchies.

The vast majority of electoral geography studies are national case studies analysing aggregate electoral data on regional or local levels. Despite of a continuously and rapidly expanding urbanisation, in the past two decades, only a few studies explored the electoral geography of contemporary cities. Past research on western cities revealed salient electoral geographic patterns between the central city more favourable toward left-wing and the suburbs more inclined toward right-wing (Cox 1968; Walks 2004; 2005; 2013; Maeschalk 2013). One study on Moscow has found a highly polarized electoral geography during the first years of post-communism (Loughlin, Kolossov and Vendina, 1997). The subfield of urban electoral geography currently suffers from underdevelopment. This paper makes a contribution to this subject.

## **Research setting**

### **a. Romanian polity and its political parties**

Ever since the fall of communism, the Romanian polity had developed as a democracy with low partisan attachments (Preda and Soare, 2008). In this regard, for mobilization, political parties had to rely heavily on political patronage, personal politics or circumstantial events. The Romanian political system is dependent on its political parties and is placed in the same category as other former communist countries where political parties create and influence the political agenda and strive to use it for electoral mobilization, not so much as a means to gain legitimate representative power within state, but to gain public offices and state resources, which are vital for the party's mere existence (Soared, 2014). The party system is generally regarded as having a high degree of

cartelisation (Barbu, 2004, p142). Because of this, the system displays a striking stability, especially given the low partisan attachments. Over the course of more than two decades, the Romanian party system had been highly dynamic and suffered many top level realignments (Soare, Popescu, Gherghina and Chiru, 2013). For these reasons, Annex 1 and Annex 2 help readers by tracking the frequent name changes, splinters and electoral alliances during 1992-2016.

Starting with the 90s, indeed, in the Romanian political system one cannot speak of a doctrinal competition based on categories like the left, the right or the centre (Tismaneanu 1996). However, certain cleavages are maintained with a relatively high importance throughout the first decade period (De Waele, 2002). During the entire period, the top-level battles were fought mostly between the successor of the former communist party (FSN/ FDSN/ PDSR/ PSD) (Pop-Elecheș, 1999) and its opposition, embodied by various parties throughout the years (Gussi, 2011). This cleavage was stronger during the 1990s, in 2004 and 2016. The 2000 election displayed a strong vote of protest against the incumbent parties of PNTCD and PNL (members in the CDR alliance). The 2008 and 2012 election were marked by personalization politics centered around the charismatic but controversial leader of PDL and head of state - Traian Băsescu. In most occasions, throughout 1992-2016, the successor party engaged in nationalist rhetoric, anti-western stances and promoted paternalistic or welfare policies. The political parties that opposed PSD promoted mostly pro-European stances and liberal economic policies. Understanding the national conflict between the successor party of PSD and its opposition provides a contextual framework for analyzing local politics in Cluj-Napoca. In the highly centralized politics of Romania, top-level national political events have deep impacts on local performance of parties and the electoral mobilization.

The presence of a numerous Hungarian ethnic group with a regional concentration at the geographical centre of the country and the dominance of the Hungarian ethnic party of UDMR among Hungarian ethnic voters created another lasting fixture within the Romanian political system. At every parliamentary election since 1992, UDMR scored more than the 5% votes required to pass the electoral threshold, thus being also the only Hungarian ethnic party to win seats in the Romanian parliament. In Cluj-Napoca, where the Hungarian ethnic minority is more numerous, UDMR has also a larger share of votes and is also one of the most important local parties.

The discourse in this section offered a framework for understanding local politics in Cluj-Napoca. National and regional political cultures and competitions come together with local events in order to create a particular urban electoral geography in the city of Cluj-Napoca. The section of the paper that analyzes the electoral geographies includes more further detailed information regarding the rhetoric and positions of parties and alliances of interest at every election.

#### **b. Politics, economics and society in Cluj-Napoca after 1989**

Following the collapse of state socialism in 1989, urban development in Romania has witnessed a full change. An urban development based on heavy industrialisation and large collective residential housings was abandoned for a western type growth embedded in a global economy. However, these transformations only came gradually. For Cluj-Napoca, for a time, the transformation was even more slower. Up until 2004, the local administration of Cluj-Napoca was led by the nationalistic and conservative Gheorghe Funar, elected as mayor three times – in 1992 and 1996 running from PUNR and in 2000 from PRM. In Funar's rhetoric, deindustrialisation was depicted as a major danger for the large numbers of industrial workers located in the socialist housing estates (Brubaker, Margit Feischmidt, Fox and Grancea, 2006). During this time, transformations were present, but they didn't resemble the extent of those in Bucharest or in other major cities of former communist Central Europe. After this period of hesitation, starting with the 2000s, Cluj-Napoca entered into an era of full-blown neoliberal transformation. The change was triggered by Emil Boc, the newly elected mayor in 2004. Since then, Boc was elected at every election on a neoliberal platform (2004: PD, 2008 and 2012: PDL, 2016: PNL).

After the mid-2000s, Cluj-Napoca strengthened its position as the second major economic center of the country. Of all the major Romanian cities, together with the capital region București-Ilfov, the housing boom of this period was most pronounced in Cluj-Napoca. Also, the job market became differentiated. Jobs in Cluj-Napoca were having a strong tendency to concentrate in the tertiary sector (IT, financial services, etc.). The new developments were favored by a growing share of young population, as Cluj-Napoca is a major university center. Between 2002 and 2011, the city population grew with 108%, higher than in other major cities and much higher than their average, namely 96%, or Bucharest-Ilfov, namely 98% (Benedek and Cristea, 2014).



**c. Longitudinal analysis on the non-geographic aggregate voting in Cluj-Napoca**

Table 1 shows the results from the parliamentary elections, aggregated at the level of Cluj-Napoca and Romania. For the 1992, 1996, 2000 and 2004, electoral data in Cluj-Napoca was employed only from regular polling location, whilst the special locations organized at hospitals, military units, etc. were excluded. The 2008, 2012 and 2016 elections used only regular locations. This selection of data applies also to the following spatial analysis.

Table 1. Aggregate results for parliamentary election in Cluj-Napoca and Romania, 1992-2016

	party or alliance	Cluj-Napoca	Romania	Cluj-Napoca compared to Romania
1992	PUNR	30%	8%	23%
	UDMR	23%	7%	15%
	CDR	22%	20%	2%
	FDSN	5%	28%	-23%
	PRM	3%	4%	-1%
	FSN	3%	10%	-8%
	PNL	2%	3%	-0,5%
1996	CDR	34%	30%	3%
	PUNR	23%	4%	19%
	UDMR	19%	7%	13%
	USD	7%	13%	-6%
	PDSR	6%	22%	-16%
	PRM	2%	4%	-2%
2000	UDMR	21%	7%	14%
	PRM	20%	19%	0,3%
	PDSR-PUR-PSDR	17%	37%	-20%
	CDR 2000	7%	5%	2%
	PD	7%	7%	-0,3%
	PNL	7%	7%	-0,4%
2004	DA PNL-PD	38%	31%	7%
	PSD+PUR	19%	37%	-18%
	UDMR	18%	6%	12%
	PRM	13%	13%	-0,2%
2008	PDL	48%	32%	16%
	UDMR	18%	6%	12%
	PSD+PC	16%	33%	-17%
	PNL	11%	19%	-7%
2012	USL	44%	59%	-15%
	ARD	29%	17%	12%
	UDMR	13%	5%	8%
	PPDD	6%	14%	-8%
2016	PNL	27%	20%	7%
	USR	22%	9%	13%
	PSD	19%	45%	-26%
	UDMR	15%	6%	9%
	ALDE	6%	6%	0,2%

Source: Values computed by the author using electoral data from <http://alegeri.roaep.ro>

There are some major patterns discernible in these descriptive statistics. I briefly explain them. The parties included in this table are the same as those included in the analysis of electoral geographies. They were selected in regard with their weight of importance within local or national politics at the time of election. For these parties or alliances, I follow longitudinal trends by providing descriptions of past or future performances.

At the top of the hierarchy, the rankings are quite different between the two geographic levels. Only in 1996 and 2012 the same actors (alliances – CDR and USL) win the election at both scales. In most of cases, there are important differences between the shares of votes parties gain at the national level and in Cluj-Napoca. The same parties are present at the both levels. There is no local party in Cluj-Napoca without national coverage or without important gains at the national level (i.e. seats in the Romanian Parliament). Partially, UDMR can be regarded as a regional party. Nevertheless, the ethnic party has rather a regional coverage that spreads through most of Transylvania. A similar case is that of PUNR. During the 1990s, the nationalist PUNR has its stronghold in Cluj-Napoca, but it also has important appeals in other parts of Transylvania and even in other regions. In Cluj-Napoca, the party was stronger because Gheorghe Funar, its leader, was also the mayor of the city. At the local election of 2000, when Funar resigned from PUNR and run for the other major nationalist party of PRM, PUNR disappeared as an important party both from Cluj-Napoca and Romania.

In the 1990s, the ethno-nationalist vote in Cluj-Napoca was stronger. At this time, PUNR had polarized the political discourse and manage to mobilize both with a strong nationalistic discourse but also by handling a nostalgic working class rhetoric (Petrovici, 2013). Also, during this time, UDMR recorded its best performances. The electoral base of UDMR diminished through the years due to migration.

Throughout the entire period, Cluj-Napoca was a place where FSN/FDSN/PDSR/PSD, the major party of Romanian politics, has performed poorer than it did at the national level. Generally, the electoral geography of the country displays a pattern with low performances in Transylvania for the successor party throughout the entire post-communist years (Giugăl, Johnston and Constantinescu, 2011). The support for the more liberal and pro-Western parties combined with the weak performance of the nationalist and conservative ones was associated with the distinct historical legacy of this region as part of the former Austro-Hungarian Empire (Roper and Feșnic,

2003). There is also another reason for the low performance of the FSN/FDSN/PDSR/PSD. It is related to the political context in the city. FSN/FDSN/PDSR had a similar appeal like PUNR. Although less radical than PUNR, the successor party also relied strongly on the working class political culture, ethno-nationalism and conservatism. In Cluj-Napoca, during the 1990s, the potential electoral base of the successor party was captured by the PUNR. In 2004 the leadership at the local administration changed as Emil Boc was elected as the new mayor. He was constantly reelected running from the main parties that opposed PSD. Starting with 2004 the city became quite a stronghold for parties and alliances opposing PSD (2004: DA, 2008: PDL, 2012: ARD, 2016: PNL and USR).

### **Spatial statistics for urban electoral geography**

For the analysis of electoral geographies, I use spatial statistics that account for the geographic properties of data (O'Sullivan and Unwin, 2010). Over the past two decades, spatial statistics have become a regular practice in electoral geography (O'Loughlin, Flint and Anselin, 1994; Agnew and Shin, 2008; Leib and Quinton, 2011). In this study, I use one particular category of spatial statistics, namely those that examine the spatial autocorrelation within the geographic data. Spatial autocorrelation statistics measure the extent of dependence between observations in geographic space (Cliff and Ord, 1973; Griffith, 1987). These tools are useful for identifying and analyzing clusters and spatial patterns of electoral support. I explore patterns at global and local scales. All tests are performed with GeoDa, a free software package that conducts spatial analysis.

Before describing these two level of analysis there are some important mentions regarding the databases used in the study. Databases were created for each parliamentary election. Each database consists of the polling locations (observations) mapped in geographic space. The locations have attributes represented by the vote shares (percentages) obtained by each party or alliance. At every election some polling locations disappeared and others new were established.

The global analysis refers to a general measure for the degree of spatial autocorrelation (degree of clustering) formed within Cluj-Napoca for each variable. This represents an assessment of the spatial electoral polarization for the entire city. I perform this measurement using the Moran's I. The test gives a global value of spatial autocorrelation for each variable (electoral score) within the geographic database.

The formula for Moran's I is formally expressed as:

$$I = \frac{N}{\sum 0} \cdot \frac{y'Wy}{y'y}$$

where N is the number of observations (polling locations),  $\sum 0$  is the sum of all weights, y represents the vector of observations, and Wy are the elements of the spatial weights matrix. The matrix depicts the contiguities formed between observations on the basis of a simple first-order vicinity. With this user-defined definition of vicinity, GeoDa computes the spatial lag of variable, represented for each observation by the mean values at surrounding observations. Moran's I takes values from -1 (lack of spatial autocorrelation) to +1 (perfect spatial autocorrelation). In order to test the significance, a z-score is computed. At a significance level of 0.05, z-score is statistically significant when it is less than -1.96 or greater than 1.96.

The analysis at the local level is conducted with LISA (Local Indicators of Spatial Autocorrelation). The test is performed with the univariate function in GeoDa. LISA are computed for each observation and its vicinity. The statistic indicates local clusters of polling locations in terms of electoral support (high values at the center location and high values at its vicinity) or lack of electoral support (low values at the center location and low values at its vicinity) (Anselin, 1995). The LISA also identifies polling locations that are distinct outliers from local patterns. Significant clusters are identified at a level of 0.05. The map used for LISA visualisation yields the cluster location only for the central observation (the vicinity and its spatial association regime is not depicted on the map).

Moran's I and LISA are inferential statistics. Besides these, I will also employ a descriptive tool, namely quantile maps. In this regard, electoral performance in every location are mapped with the distribution of values divided into quantiles with four classes.

## **Exploration of electoral geographies in Cluj-Napoca**

### **a. Global patterns of electoral support**

This part of paper presents an overall longitudinal perspective on the evolution of electoral geographic polarization within the city. In this regard, the global analysis shows the degrees of

geographic polarization for parties and alliances at every election. Table 2 depicts the Moran's I for parties and alliances of interest at every parliamentary election between 1992-2016. Other columns show the z-score used for inference and the vote share scored in Cluj-Napoca. This latter column has a role of benchmark for comparison.

Table 2. Moran's I and performances in Cluj-Napoca for parties and alliances of interest

<i>Year</i>	<i>party/ alliance</i>	<i>I</i>	<i>z-score</i>	<i>votes</i>	<i>Year</i>	<i>party/ alliance</i>	<i>I</i>	<i>z-score</i>	<i>votes</i>
1992	PUNR	<b>0.51</b>	<b>7.79</b>	30%	2004	DA PNL-PD	<b>0.25</b>	<b>3.8</b>	38%
	UDMR	<b>0.26</b>	<b>4.11</b>	23%		PSD+PUR	<b>0.16</b>	<b>2.5</b>	19%
	CDR	<b>0.47</b>	<b>7.4</b>	22%		UDMR	<b>0.13</b>	<b>2.11</b>	18%
	FDSN	<b>0.15</b>	<b>2.45</b>	5%		PRM	<b>0.4</b>	<b>6.26</b>	13%
	PRM	<b>0.15</b>	<b>2.59</b>	3%	2008	PDL	<b>0.35</b>	<b>5.38</b>	48%
	FSN	0.11	1.76	3%		UDMR	<b>0.14</b>	<b>2.36</b>	18%
	PNL	0.12	1.88	2%		PSD+PC	<b>0.34</b>	<b>5.04</b>	16%
1996	CDR	<b>0.28</b>	<b>4.38</b>	34%		PNL	<b>0.44</b>	<b>6.62</b>	11%
	PUNR	<b>0.52</b>	<b>8.08</b>	23%	2012	USL	<b>0.31</b>	<b>4.81</b>	44%
	UDMR	<b>0.26</b>	<b>4.12</b>	19%		ARD	<b>0.42</b>	<b>6.02</b>	29%
	USD	<b>0.2</b>	<b>3.24</b>	7%		UDMR	<b>0.18</b>	<b>2.93</b>	13%
	PDSR	<b>0.38</b>	<b>5.59</b>	6%		PPDD	<b>0.25</b>	<b>3.82</b>	6%
	PRM	- 0.07	-0.95	2%	2016	PNL	<b>0.37</b>	<b>5.46</b>	27%
2000	UDMR	<b>0.24</b>	<b>3.79</b>	21%		USR	<b>0.46</b>	<b>6.96</b>	22%
	PRM	<b>0.43</b>	<b>6.2</b>	20%		PSD	<b>0.44</b>	<b>6.42</b>	19%
	PDSR-PUR- PDSR	- 0.02	-0.1	17%		UDMR	<b>0.17</b>	<b>2.76</b>	15%
	CDR 2000	<b>0.46</b>	<b>6.9</b>	7%		ALDE	<b>0.23</b>	<b>3.51</b>	6%
	PD	<b>0.15</b>	<b>2.25</b>	7%					
	PNL	<b>0.29</b>	<b>4.56</b>	7%					

Source: Values computed by the author using electoral data from <http://alegeri.roaep.ro>

At every parliamentary election there is an important electoral geographic polarization. The longitudinal analysis shows several significant temporal patterns. Geographic electoral polarization is at high levels in the 1990s and afterwards starting with 2008. Lower degree of geographic polarization is present in 2000 and 2004. The most stronger geographic polarization is

found in 1992 and 2016. I believe this pattern is best explained by the competition within the national political system and the socio-spatial structure of the city. The national political culture and party politics were highly radicalized during the 1990s. Parties had strong stances on issues regarding the national communist legacy. At this time, major Romanian cities, including Cluj-Napoca, emerged after decades of socialist developments that decisively transformed their socio-spatiality. In the first half of the 2000s, the political competition was more centripetal. At this time, the city was also gradually transforming under the neoliberal project. Former working class neighborhoods were changing, the historical center was undergoing gentrification while in the suburbs new houses were being built. Beginning with the 2008 parliamentary election, Romanian politics increasingly became more personalized, polarized and confrontational. High levels of ideological competition reappeared at the 2016 election. At this time, Cluj-Napoca was a global city fully developing under the neoliberalism.

### **b. Local patterns of electoral support**

This part of the paper analyses local geographic patterns of electoral support in Cluj-Napoca at parliamentary elections during 1992-2016. The analysis follows each election and discusses patterns for parties and alliances of interest. Due of the large number of parties at the top-level politics of Cluj-Napoca, an approach that deals individually with each election is preferable to one which would have analyzed longitudinally the patterns for each party. This latter approach would have been preferable if we had a stable party system and with the same parties competing over the years.

#### **b.1. The 1992 parliamentary election**

Electoral geographies at the 1992 parliamentary election depict high geographic clusterization. The electoral patterns follow the socio-spatial structure of the city. Figure 1 and Figure 2 show the quantile map and LISA map for this election. For most of the political parties the patterns depict a strong cleavage between the historic part of the city (the pre-socialist tissue) and the socialist developments (large collective housing ensembles).



Figure 1. LISA maps for the 1992 parliamentary election

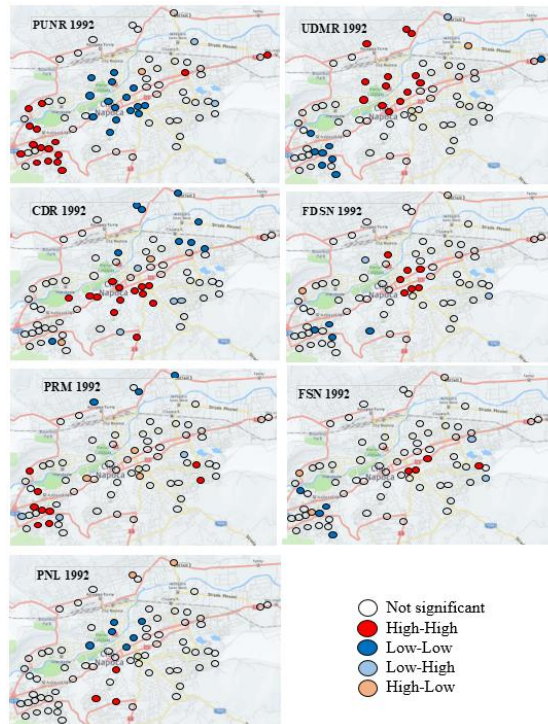
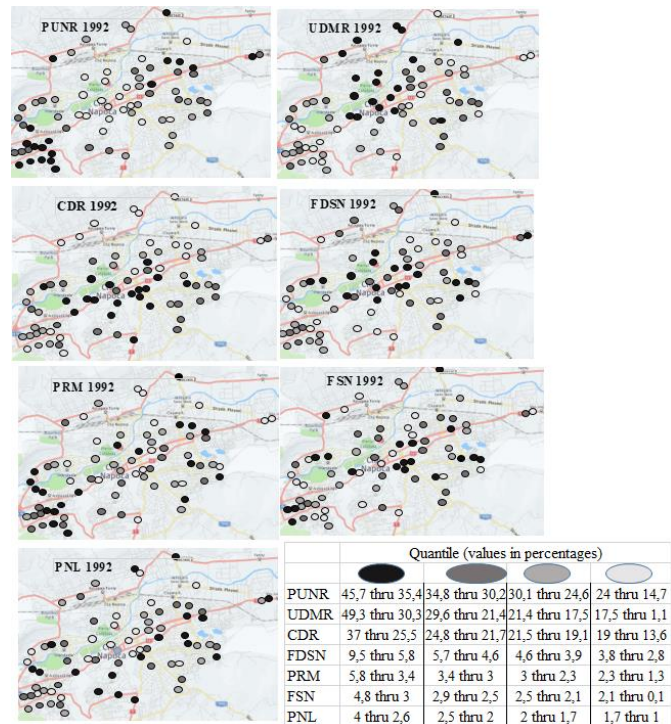


Figure 2. Quantile maps for the 1992 parliamentary election



Source: Values computed by the author using electoral data from <http://alegeri.roaep.ro>

PUNR ranked first with 30% of votes. Its electoral support was clustered mostly in the working class neighborhood of Mănăştur, located in the south-west of the city. Other small clusters are located northern of Mănăştur and in the rather semi-urban eastern periphery of the city. The electoral base of UDMR is formed from ethnic voting. The party is stronger in places where large groups of Hungarians are located, meaning in the old town and in the northern part of the city, largely unaffected by the socialist urban developments. UDMR is weaker in the industrial parts of the city. The map of UDMR is strongly in opposition with that of PUNR. The electoral geography of CDR also shows strong patterns. The alliance was solid in the old town and in other surrounding low-density residential areas at west and south. CDR also has important support towards south in Zorilor. This is a rather smaller neighborhood and less industrialized (in comparison with Mănăştur), comprising of socialist collective ensembles and low-density areas. CDR was weakest in the rather poorer areas from the north and north-east and in the working class neighborhood of Măraşti – located east of the historical city and composed mainly of large collective ensembles.



The electoral geographies of FDSN, PRM, FSN and PNL were less polarized than those of PUNR, CDR and even UDMR. Nevertheless, some smaller local patterns of support are still visible. FDSN and FSN had fairly similar patterns and were stronger mostly in the old town and in some scattered parts of the socialist ensembles. For these two parties, low support was clustered in the eastern Mănăştur and in the south. Higher support for PRM was clustered in Mănăştur. Having a strong nationalistic rhetoric, the PRM was weakest in places where UDMR recorded its best performances. For PNL patterns of support are clustered in the south, but higher shares of votes are scattered throughout the city. As it was the case with other parties, clusters of low support for PNL were exactly the same as UDMR hot spots of higher support.

### **b.2. The 1996 parliamentary election**

The 1996 parliamentary election was won by CDR with a significant margin both at the national level and in Cluj-Napoca. CDR, being the main opposition during the past years, highly benefited from an economic voting against PDSR (FDSN), who was in office almost since 1990. From Figure 3 and Figure 4 it is visible that electoral geographies at this election show a strong consistency with the patterns from the previous election.

For CDR, the electoral geography is less clustered than four years before. The alliance now had a catch-all rhetoric and was composed also of the PNL. CDR is stronger in the south-central area and southern in Zorilor. Weaker performances are found in low-density residential areas located in the central-western neighborhood of Gruia and in the north-westerly neighborhood of Dâmbul Rotund. However, apart the places mentioned above, other CDR's good performances are scattered throughout the entire city. UDMR's and PUNR's maps are powerfully consistent with the previous performances from 1992. PUNR has stronger displays in Mănăştur and weaker in the central area. UDMR is stronger in the central and northern areas and weaker in the socialist urban developments (mainly Mănăştur). Again, the maps of PUNR and UDMR are in opposition. In 1992, FSN was slightly stronger in the central area and weaker in Mănăştur. At the 1996 election, together with a minor party, forming the USD alliance, the former FSN, now with a name change in PD, proposes a modified electoral geography. USD is more solid in the industrial and working class neighborhoods and visible less solid in the central area and its vicinity (Gruia). Areas of support or lack of support resemble those of 1992, but the degree of clusterization is stronger in 1996. PDSR hot spots are found in a large portion of the central area together with its low-density

vicinity area and also in the socialist developed neighborhood of Gheorgheni. This area of collective ensembles was built on the principle of microrayons (Maxim, 2009) including many green spaces and other amenities. PDSR's lower performances are recorded in Mănăştur and Măraşti. The LISA map for the nationalistic PRM is the least clusterized. Nevertheless, some support for the party is scattered throughout the working class neighborhoods while low performances are generally correlated with the ethnic voting for UDMR.

Figure 3. LISA maps for the 1996 parliamentary election

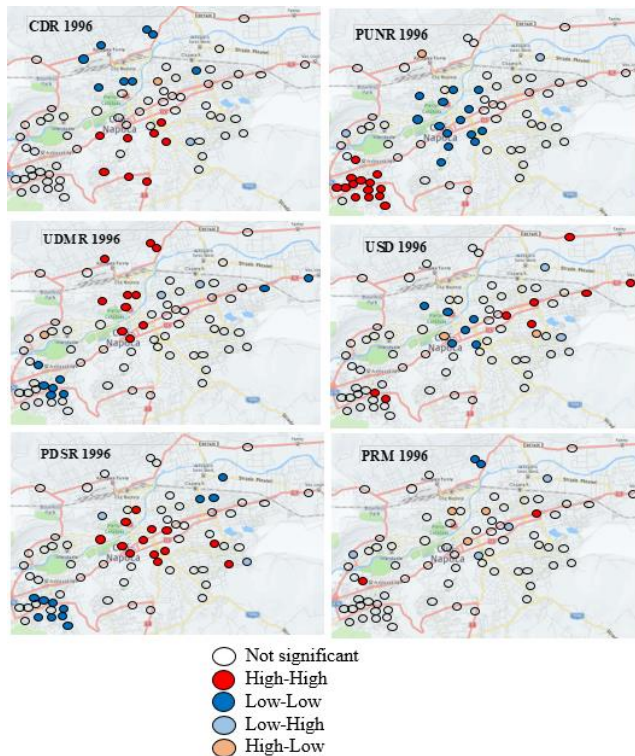
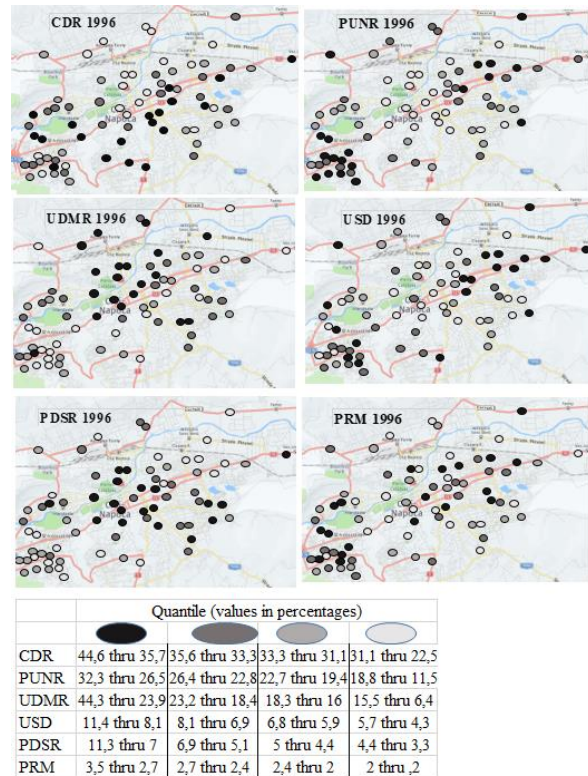


Figure 4. Quantile maps for the 1996 parliamentary election



Source: Values computed by the author using electoral data from <http://alegeri.roaep.ro>

## b.2. The 2000 parliamentary election

At the 2000 election, there was a big dissatisfaction with the CDR due to the poor governing performance of the incumbent alliance. The election was far less polarized than the previous two. In the past years, at the national level, the main fixture was the fight between

FSN/FDSN/PDSR and CDR (PNTCD, PNL). Now, this competition becomes irrelevant after the alliance proved unable to govern more efficiently than the successor party. The maps for the 2000 parliamentary election are displayed in Figure 5 and Figure 6. The electoral geographies at this election are less polarized and with few larger clusters.

Figure 5. LISA maps for the 2000 parliamentary election

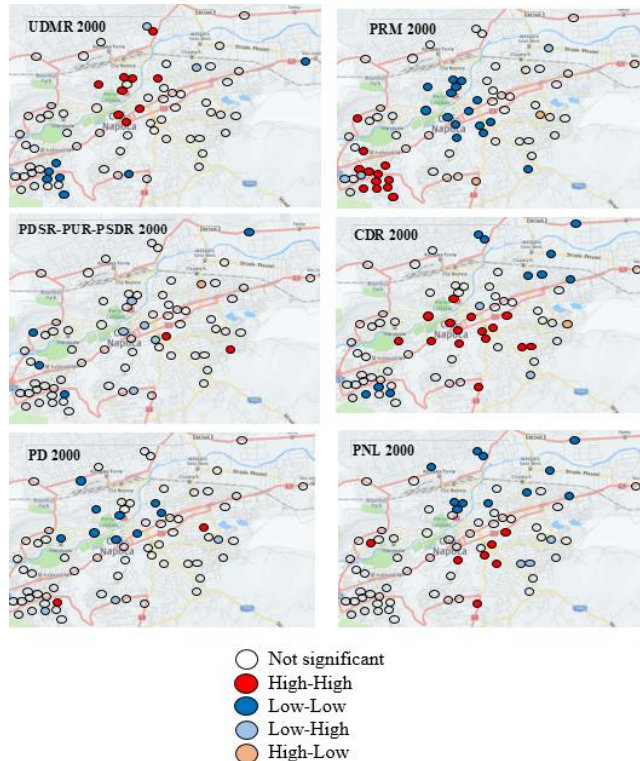
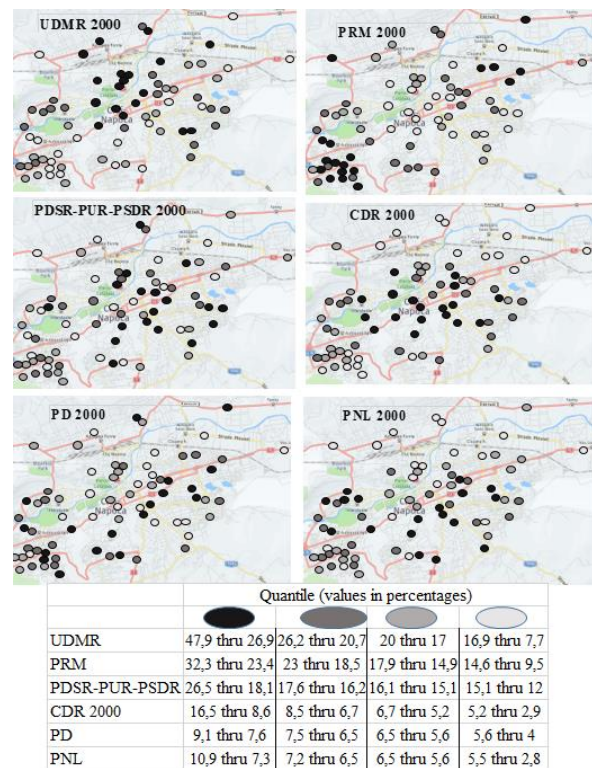


Figure 6. Quantile maps for the 2000 parliamentary election



Source: Values computed by the author using electoral data from <http://alegeri.roaep.ro>

UDMR recorded the highest score (21%). However, other players had similar performances - PRM (20%) and PDSR-PUR-PSDR (17%). UDMR has largely the same electoral geography. The ethnic vote is stronger in the central areas. However, the pattern of support in the northern city is significantly diminished than in 1992 or 1996. Clusters of weaker support are again located in Mănăştur. PRM became PUNR's successor and colonised its electoral geography. The party is stronger in Mănăştur and weaker in the central area. The traditional opposition with UDMR is active again. PDSR ran inside the PDSR-PUR-PSDR alliance as the major actor. Its electoral



geography lacks solid patterns. The global Moran's I indicates no overall clustering while the local patterns are few. Nevertheless, the support is still stronger in the central area's vicinity and Gheorgheni and weaker in Mănăştur. Because of the negative vote, the CDR is reduced to its core of electoral support. The geography is very similar to the 1992 one. Major clusters indicate a stronger support in the central area, with its low-density vicinity and lower performances concentrated in Mănăştur, Măraşti and the northern peripheries. As in previous elections, PD's electoral geography is one of the least clustered. As a general pattern, PD lacks support in the central areas and Gruia. Better performances are scattered incoherently through the socialist developments. PNL has higher shares of vote in the central-southern area. Lower performances are clustered in the central-north and in the northern peripheries. PNL's electoral geography is coherent with previous patterns from 1992 and 1996.

#### **b.4. The 2004 parliamentary election**

Starting with the 2004 parliamentary election, the total number of significant actors within the national and local party system reduces consistently. In this regard, only four actors are analysed at this election. As a result of the system concentration, the total share of votes in Cluj-Napoca for the four actors in 2004 was similar to that of the seven actors analyzed for 1992 (88%). In Cluj-Napoca, the election was won with a large margin by the DA alliance composed of PNL and PD, at that time two rather medium parties within a national party system dominated by PSD. The overall geographic clusterization is slightly lower than in 2000. The maps for the 2004 election are displayed in Figure 7 and Figure 8.

Clusters for DA are at medium to lower strength. The electoral geography of DA is consistent in a high degree with the legacies of CDR and PNL at previous elections and to lower extents with the former electoral geography of PD. Clusters of higher support are located in the central-southern area in Zorilor and in the low-density neighborhood of Andrei Mureşanu. The places with lower scores are traditionally located in UDMR's spaces of support, within the central-northern and northern parts of the city. As seen from the quantile map, DA has above average performances also in the socialist developments in Mănăştur, Măraşti, Grigorescu and Plopilor. The electoral geography of PSD+PUR shows little concentration. Clusters of support are located on a small area of the central city and in Gheorgheni. Some of the lowest performances are present in Zorilor. To a important degree, the electoral geography for PSD in 2004 continues to depart

from the electoral geographies set by the party in the 90's, which were characterized by clusters of support in the central city. A decrease in polarization can be seen also in the map of UDMR. Clusters of support are concentrated within the central city, its near low-density vicinity and to a lesser extent in the northern city. Spatial patterns for lack of support are reduced to a smaller area of Mănăştur. PRM depicts the most polarized electoral geography. The patterns have a strong consistency with the party's map of 2000 and PUNR's maps. The party is stronger in eastern peripheries, Mărăşti, Între Lacuri (a smaller neighborhood comprising mainly socialist developments together with some single-family houses), Mănăştur. Lower support is clustered in the central city, central-western, central-southern, southern and south-eastern parts.

Figure 7. LISA maps for the 2004 parliamentary election

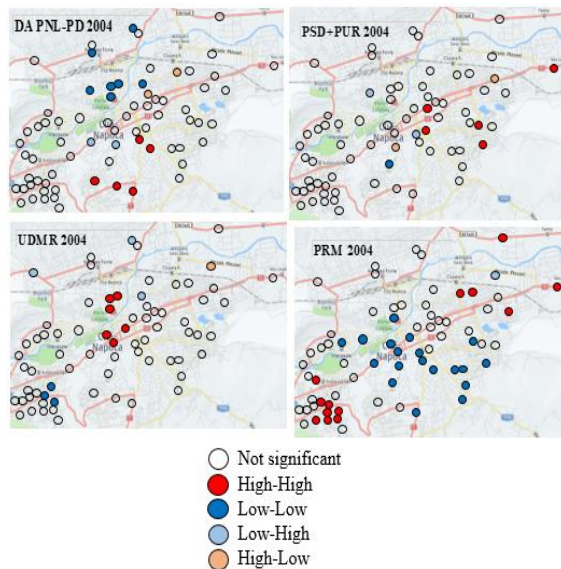
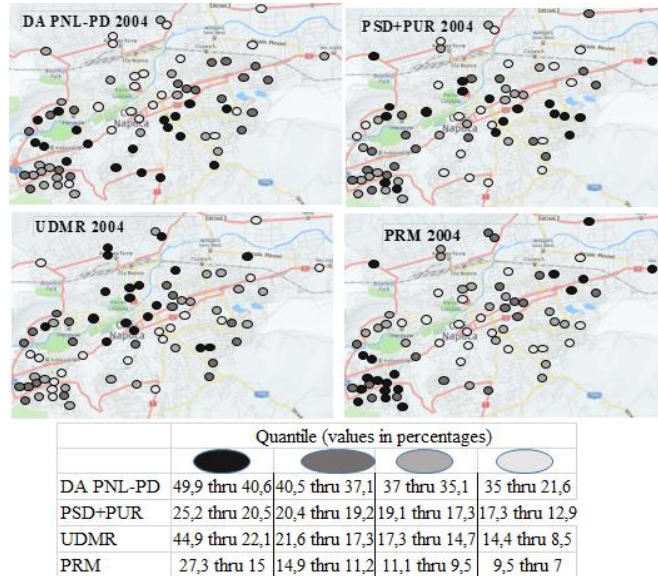


Figure 8. Quantile maps for the 2004 parliamentary election



Source: Values computed by the author using electoral data from <http://alegeri.roaep.ro>

### b.5. The 2008 parliamentary election

At the time of the 2008 parliamentary election, the city was already experiencing patterns of increasing socio-spatial differentiation following the urban neoliberal developments that began to develop steady after 2004. The political polarization within the party system and political culture was somewhat important but was far from the intensity of the political fights of the 1990s.

Nevertheless, as we shall see, despite the lower political polarization, the electoral geographies of 2008 had clear cut patterns. The maps for the 2008 parliamentary election are showed in Figures 9 and 10.

Figure 9. LISA maps for the 2008 parliamentary election

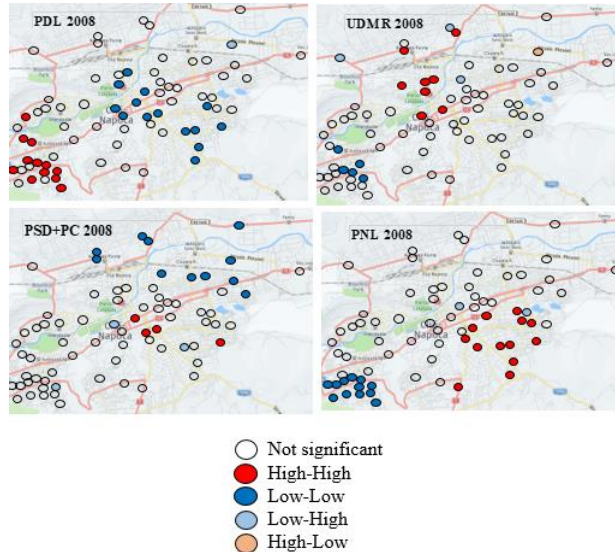
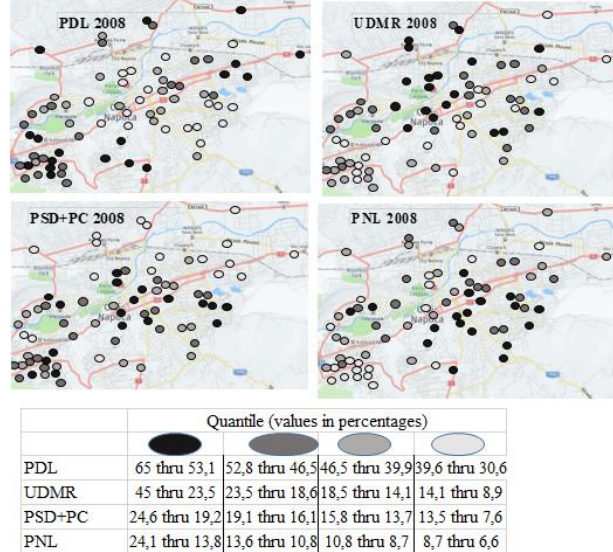


Figure 10. Quantile maps for the parliamentary election



Source: Values computed by the author using electoral data from <http://alegeri.roaep.ro>

PDL is the first to win two consecutive election. The party has a landslide victory achieving the highest share recorded in Cluj-Napoca at parliamentary election (48%). At this election the party had a catch-all rhetoric. Its electoral geography has extensive clusters that depicts parts of the former electoral geographies of PUNR and PRM. PDL stronger performances are concentrated in the western socialist developments in Mănăştur, Grigorescu and Plopilor. Weaker performances are clustered in the central area, Gruia, Gheorgheni and Andrei Mureşanu. PDL also has above average scores in Zorilor, Măraşti and in the other peripheries. UDMR portrays its traditional electoral geography. Clusters of support are located in the central and central-northern area. Lower support is clustered in Mănăştur. At this election, PSD has an electoral geography resembling the patterns of the 90's with stronger support in the central city and in Gheorgheni. Weaker performances are clustered in Măraşti and in the northern low-density peripheries. The quantile map also shows important above average scores in Mănăştur. This latter pattern is consistent with

the 2000's developments within PSD's electoral geography. PNL has the most polarized electoral geography. Its clusters show clear cut patterns. The geographic structure of the vote for PNL has some similarities with previous patterns for CDR, DA and PNL at previous elections. In this regard, the party is stronger in parts of the central city, Andrei Mureșanu and partially in Zorilor. However, unlike previous performances, PNL has clusters of support also in Gheorgheni (its socialist developments and its pre-socialist low-density areas). Also, unlike previous patterns, PNL has its large clusters of weak performances located in Mănăştur.

At the 2008 election, Cluj-Napoca is divided in clear cut spatial patterns. Each of the four electoral geographies of interest has patterns in high opposition with the others. Unlike previous elections, there is no major geographic overlapping between the parties or alliances.

#### **b.6. The 2012 parliamentary election**

At the 2012 parliamentary election, PDL is hit by an economic vote. During the financial recession, as a governing party, PDL used heavy austerity measures and with little concern for social protection. This sparked a great dissatisfaction towards the governing party. However, Cluj-Napoca was still a favorable place for PDL. This situation is depicted in Table 1. PDL running in the ARD alliance gains 29% in Cluj-Napoca in comparison with the lower 17% at the national level. The election is won by the USL alliance composed of PSD, PNL and other minor parties. USL recorded 44% of the votes in Cluj-Napoca, much fewer than it did at the national level – 59%. The electoral geographies at this election show a degree of geographic polarization consistent with 2008. The maps are displayed in Figure 11 and Figure 12.

The electoral geography of USL is consistent with 2008 patterns of PSD and PNL. The alliance is stronger in the central city, its low-density vicinity in the south-east, and the socialist developments of Gheorgheni. However, these patterns of support are less small and less clustered than those of PSD+PC and PNL in 2008. Small patterns indicating little support are distributed in all suburban low-density northern areas. As seen from the quantile map, in these places ARD scores above average performances. The electoral geography of ARD is consistent with previous PDL patterns. ARD is stronger in Mănăştur and Zorilor. Other above average scores are recorded in Mărăşti. The alliance lacks support within the historical city, Gruia and the central-northern area. These latter patterns are consistent with lower performances of DA in 2004 and PDL in 2008. UDMR continues its traditional patterns. The party is stronger in the central and northern city.



Lack of support is clustered in Mănăştur and as a novelty also in Zorilor and the southern parts. These latter places developed massively during the real estate boom following the extensive neoliberal policies. Newer neighborhoods developed in this southern area for upper-middle class citizens – Europa and Bună Ziua (both villas and collective housings). PPDD was a populist party with an ephemeral existence. The party has better performances within the northern and eastern peripheries and in the Mărăşti area. PPDD is much weaker in affluent areas – in central city, Zorilor, Andrei Mureşanu, Grigorescu.

Figure 11. LISA maps for the 2012 parliamentary election

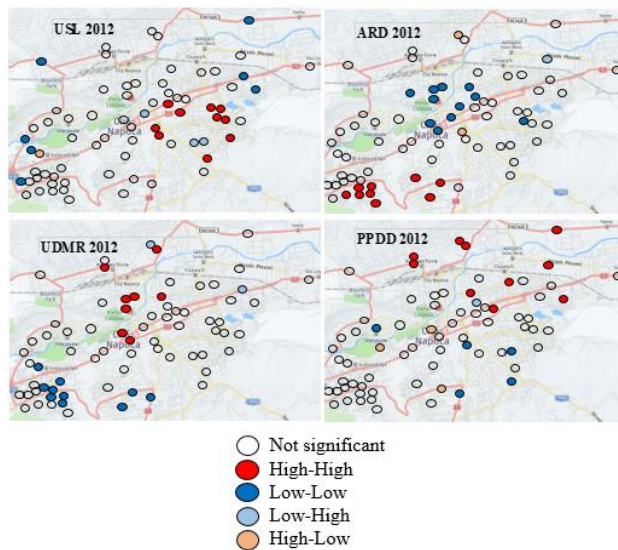
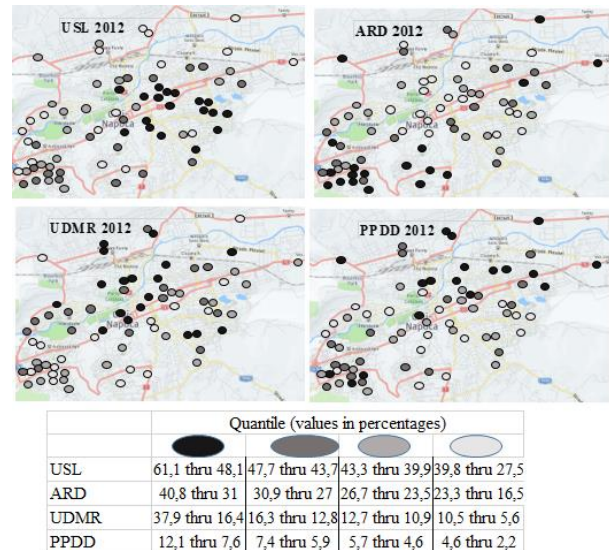


Figure 12. Quantile maps for the 2012 parliamentary election



Source: Values computed by the author using electoral data from <http://alegeri.roaep.ro>

### b.7. The 2016 parliamentary election

Unlike the previous election, in 2016 the results were much closer. There was no landslide victory. PNL, who had merged in 2014 with PDL, scored 27% of votes. Closely behind was the new party of USR gaining 22% and PSD gaining 19%. At the national level, PSD managed to obtain a massive win, but Cluj-Napoca continued to be a favourable place for the political party of mayor Boc. The electoral geographies at this election produced major spatial patterns resembling the polarization at the 1992 election. The maps for the 2016 parliamentary election are displayed in Figures 13 and 14.

Figure 13. LISA maps for the 2016 parliamentary election

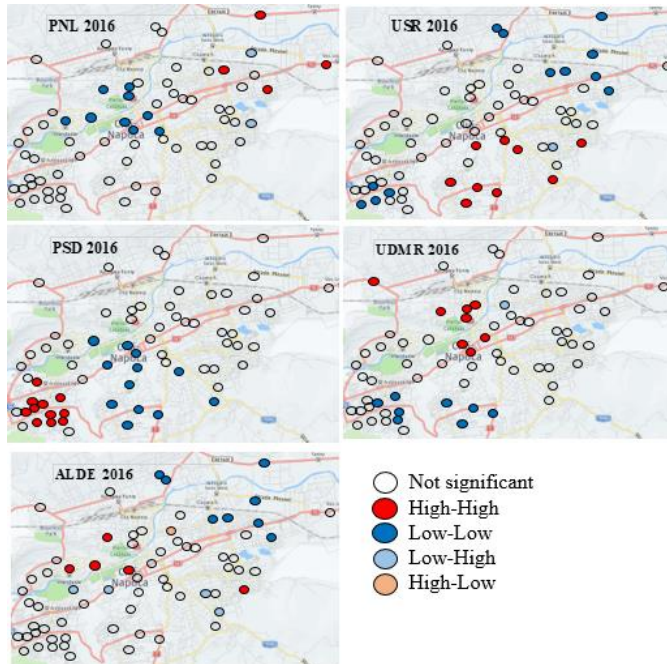
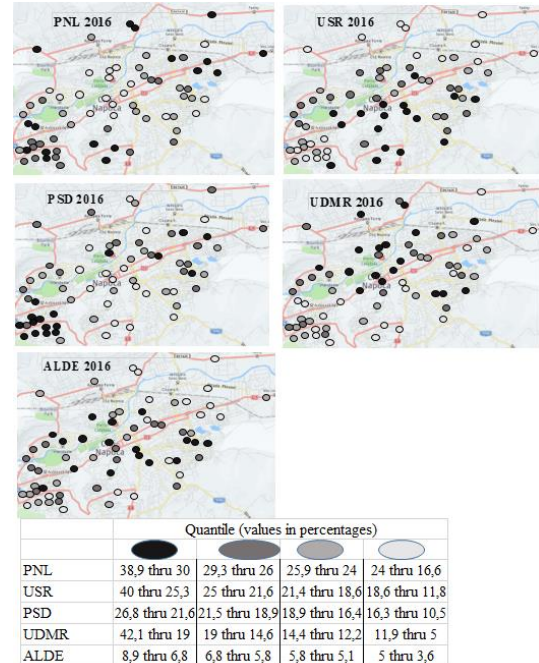


Figure 14. Quantile maps for the 2016 parliamentary election



Source: Values computed by the author using electoral data from <http://alegeri.roaep.ro>

The electoral geography of PNL is different from the traditional one of the party. This is caused by the electoral legacy inherited from PDL. PNL clusters of high support are located in Mărăști, Între Lacuri and the eastern and northern low-density areas. Also there is important above average support in Mănăștur and Zorilor. Unlike the previous election, but as a consequence of PDL's legacy, PNL's lack of support is concentrated within the central city. Other clusters of low support are located in Gruia. USR is a new political party with an electoral base composed mainly of highly educated and urban citizens. Clusters of high support are located in the central-south, Andrei Mureșanu, Zorilor and the new developments of Europa and Bună Ziua. Lower support is clustered in Mănăștur, Mărăști and the other peripheries of north and north-east. PSD has an electoral geography distinctive from the previous patterns (mostly those of the 1990s). The party scores better performances in Mănăștur. Lack of support is clustered through an extensive area within central city, Gruia, Zorilor, Andrei Mureșanu, Europa and Bună Ziua. Other above average performances are recorded in Mărăști and Între Lacuri. The electoral geography of UDMR is

consistent with the patterns from 2012. The ethnic vote is stronger in the central city and Gruia and much weaker in Mănăştur, Zorilor and the more southern areas. ALDE is a small center-right party with liberal stances formed in 2005 and composed of PC and a splinter of PNL. Clusters of higher support are located in Grigorescu, Cetăţuia, Gruia and Gheorgheni. Clusters of negative performances are located in the same places as those for USR.

### **Conclusion**

In the present paper I explored the electoral geographies of Cluj-Napoca at parliamentary elections during 1992-2016. The electoral patterns for political parties and electoral alliances were explored using spatial statistics at global and local level. The research identified strongly stable spatial patterns of support within the city. For example, the vote for the Hungarian ethnic party of UDMR is consistent clustered in the central city and its near vicinity. In another example, up until the 2004 election, the neighborhood of Mănăştur – the largest socialist developed area comprising of large collective housings built for industrial workers – was a solid stronghold for nationalistic and populist parties. The more affluent and younger areas in the south were mostly in all cases associated with large vote shares for the liberal and pro-western parties. The longitudinal analysis also revealed over the years important changes and realignments within electoral geographies. With the exception of the UDMR, the other major parties had colonised, replaced, occupied and inherited various places throughout the years, sometimes almost completely changing their electoral geography during consecutive elections. The electoral geographies we explored are polarized in many instances by two major areas within the city: Mănăştur and the central historical town. The following two paragraphs point out some important conclusions on the development of electoral patterns within these spaces.

Mănăştur appears as the main cluster area (positive or negative) for most of the electoral geographies. Over the years, many political parties have realigned within this space, without establishing a solid stronghold for more subsequent elections. Mănăştur is the most populous neighborhood in Cluj-Napoca and was designed during the socialist era mostly to accommodate the workers from the nearby large factories. For UDMR, Mănăştur was always the weakest spot in its electoral geography. The neighborhood was consistently sympathetic towards political parties with the patriotic, working class, catch-all and polarized electoral discourses. During the 90s, PUNR was the strongest in this area. At the 2004 election, PRM had its hot spots in Mănăştur.

In 2008, the parties realigned again, and PDL with a catch-all rhetoric became the main party in this space. After 2009, PDL departed from the catch-all rhetoric and moved towards a more neoliberal and austerity platform. However, the party still preserved its legacy. In 2012, running as the major party in the ARD alliance, PDL maintained hot spots in Mănăştur. At the 2016 election, the electoral geography of PSD – now the main catch-all party - had its stronghold in this neighborhood.

The historical area had a smaller role as a stronghold than Mănăştur did. At the beginning of the transition, the central space had a much older than the large socialist housing estates. Catch-all, working class and nationalistic stances were less successful in the historical city than they did in Mănăştur. At every election, UDMR had recorded its best performances within this space. The Hungarian ethnic party was the only one with consistent high scores in the historical city. Hot spots developed by other parties were not so strong and extensive as those in Mănăştur. During the 90s, the other parties that did well in the historical area were CDR, FDSN/ PDSR, FSN. These were parties with more centrist themes than those of PUNR which were directly primarily towards the working class. In the early 2000s, the overall electoral polarization decreases, and the historical city also shows fewer and smaller patterns of support (with the exception of UDMR). During the 2008-2012, as PDL develops strongholds within the large socialist estates, the other major party, namely PSD, scores its better performances within this historical area. As the gentrification intensified, attitudes became more post-material. In this context, at the 2016 election, USR was the only party, together with UDMR, that displayed clusters of high performances in the historical part of Cluj-Napoca.

The paper shows the importance of urban socio-spatial structure for political behavior in cities, since evidence from Cluj-Napoca has shown how current and past urban dynamics are correlated with transformations within electoral geographies. A point is stressed here on the need to study electoral behaviour also in other urban contexts. Further research could expand on the findings regarding the politics of Cluj-Napoca and the Romanian political system.

## Annexes

### Annex 1. Acronyms and names for political parties and alliances

Acronym	Name	
	Romanian	English
ALDE	Alianța Liberalilor și Democraților	Alliance of Liberals and Democrats
ARD	Alianța România Dreaptă	Right Romania Alliance, also translated as Just Romania Alliance
CDR	Convenția Democrată Română	Romanian Democratic Convention
DA	Dreptate și Adevăr	Justice and Truth
FDSN	Frontul Democrat al Salvării Naționale	Democratic National Salvation Front
FSN	Frontul Salvării Naționale	National Salvation Front
PC	Partidul Conservator	Conservative Party
PD	Partidul Democrat	Democratic Party
PDL	Partidul Democrat Liberal	Democratic Liberal Party
PDSR	Partidul Democrației Sociale din România	Party of Social Democracy in Romania
PNL	Partidul Național Liberal	National Liberal Party
PNTCD	Partidul Național Țărănesc Creștin Democrat	Christian Democratic National Peasants' Party
PPDD	Partidul Poporului – Dan Diaconescu	People's Party – Dan Diaconescu
PRM	Partidul România Mare	Greater Romania Party
PSDR	Partidul Social-Democrat Român	Romanian Social Democratic Party
PUNR	Partidul Unității Națiunii Române	Romanian National Unity Party
PUR	Partidul Umanist Român	Romanian Humanist Party
UDMR	Uniunea Democrată Maghiară din România	Democratic Alliance of Hungarians in Romania
UNPR	Uniunea Națională pentru Progresul României	National Union for the Progress of Romania
USD	Uniunea Social-Democrată	Uniunea Social-Democrată
USL	Uniunea Social-Liberală	Social Liberal Union



Annex 2. Name changes for parties/ alliances and composition of alliances

	party/ alliance in election	<i>name changes and associated parties in alliance</i>
1992	FDSN	-
	FSN	-
	PNL	-
	CDR*	<i>PNTCD/ other minor parties</i>
	UDMR	-
	PRM	-
	PUNR	-
1996	CDR*	<i>PNTCD/ PNL/ other minor parties</i>
	PUNR	-
	UDMR	-
	USD	<i>PD (name change - from FSN)/ PSDR</i>
	PDSR	<i>name change from FSN</i>
	PRM	-
2000	UDMR	-
	PRM	-
	PDSR-PUR-PSDR*	<i>PDSR/ PUR/ PSDR - latter two are minor parties</i>
	CDR 2000*	<i>PNTCD/ other minor parties</i>
	PD	-
	PNL	-
2004	DA PNL-PD*	<i>PNL/ PD</i>
	PSD+PUR*	<i>PSD/ PUR</i>
	UDMR	-
	PRM	-
2008	PDL	<i>name change from PD</i>
	UDMR	-
	PSD+PC*	<i>PSD/ PC (name change - from PUR)</i>
	PNL	-
2012	USL	<i>PSD/ PNL/ other minor parties</i>
	ARD	<i>PDL/ other minor parties - including PNTCD</i>
	UDMR	-
	PPDD	-
2016	PNL	-
	USR	-
	PSD	-
	UDMR	-
	ALDE	-
	* - alliance	

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