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Adres redakcji / Address for Correspondence
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An evaluation and analysis framework of integration policies as exemplified by foreigner integration policies — the experiences of selected European states

Ramy ewaluacji i analizy polityki publicznej na przykładzie polityki integracji cudzoziemców — wybrane doświadczenia europejskie

Agnieszka Kulesa*

Abstract

The subject of the considerations undertaken in the article is evaluation and analysis of integration policy, i.e. the one that concerns the integration of foreigners. Integration is understood as a dynamic, two-way process of mutual accommodation by all immigrants and residents of the European Union Member States (EU MS). The article aims at deepening the reflection on what it means to evaluate and analyse the integration policy defined this way as well as presenting the attempts to develop relevant frameworks in selected EU Member States.

Abstrakt

Przedmiotem rozważań podjętych w artykule jest ewaluacja i analiza polityki integracyjnej, czyli takiej, która dotyczy integracji cudzoziemców. Ta ostatnia rozumiana jest jako proces dynamicznego, dwukierunkowego i wzajemnego dostosowania migrantów oraz osób zamieszkałych na terenie państw członkowskich Unii Europejskiej (UE). Celem autorki artykułu jest pogłębienie refleksji dotyczącej tego, czym jest ewaluacja i analiza tak rozumianej polityki integracyjnej oraz przedstawienie prób wypracowania ich ram w wybranych państwach UE.

* Warsaw School of Economics; (e-mail: aga.kulesa@gmail.com); https://orcid.org/0000-0003-2895-102X.

Key words: evaluation of integration policy, analysis of integration policy, integration of foreigners, integration policy

Słowa kluczowe: ewaluacja polityki integracyjnej, analiza polityki integracyjnej, integracja cudzoziemców, polityka integracyjna

Introduction

As the interest in the migration policy in Poland has increased after 2015, public debates devote more attention to immigrant integration as well. The analysed issues concern the essence and goal of that process, the effectiveness of the current actions and suggested future solutions. At the same time, the solutions applied thus far have not undergone any critical, systematic and planned assessment which could form a solid basis for developing possible recommendations of changes. Public authorities reduce policy efficacy to the accomplishment of the financial aspect of the tasks scheduled for a given year. Such approach by no means meets the criteria of a reliable evaluation and analysis of integration policies.

Integration is an open and ambiguous concept. According to Rinus Penninx, the integration of foreigners is "the process of becoming an accepted part of society,"[1] while the European Union (EU), in line with the Common Basic Principles for Immigrant Integration Policy (2004), views integration as "a dynamic, two-way process of mutual accommodation by all immigrants and residents of Member States."[2] An integration policy is one which leads to integration.

The article aims at deepening the reflection on what it means to evaluate and analyse an integration policy as well as presenting the attempts to develop relevant frameworks in selected EU Member States. To achieve this goal, I will draw on the achievements of researchers from Poland and abroad who deal with the issue of public policy evaluation and analysis as well as the application of scientific knowledge by political decision makers to integration policies.[3] I will

[1] R. Peninnx: *Decentralizacja polityk integracyjnych. Zarządzanie migracją w miastach, regionach i społecznościach lokalnych*. W: *Laboratoria integracji. Obserwacje i notatki praktyczne*. Red. M. Bieniecki, M. Pawlak. Gliwice 2010, p. 23.

[2] Council of the European Union, Press Release, 2618th Council Meeting, Justice and Home Affairs, 14615/04 (Presse 321), Brussels, 19 November 2004 — http://www.consilium.europa.eu/ueDocs/cms_Data/docs/pressData/en/jha/82745.pdf, p. 17 (accessed: 6.02.2019).

[3] M. Pawlak: *Wykorzystanie wiedzy naukowej i eksperckiej w kształtowaniu polityki integracji migrantów w Polsce po 2004 roku*. "Normy, Dewiacje i Kontrola Społeczna" 2012, nr 13, p. 105—138; Idem: *Polityki publiczne wobec migracji*. W: *Nauki o polityce publicznej. Monografia dyscypliny*. Red. J. Kwaśniewski. Warszawa 2017, p. 288—311; M. Sakowicz: *Analiza polityki publicznej z wykorzystaniem modelu cyklu działań publicznych*. W: *Polityka*

also analyse the significant legal acts of the European Union. Consequently, the first part of the article will be devoted to evaluation and analysis of public policies in general and integration policies in particular; then, I will discuss integration policy evaluation and analysis in the EU; finally, I will present examples of integration policy evaluation in Great Britain, Germany and Poland.

Evaluation and analysis of public policies

Public policy is "a field of systemic, ordered actions taken by the state and its citizens which stem from generated and objectivised knowledge and aim at solving key collective problems."[4] Public policy is also sometimes defined as "an intended and purposeful process of accomplishing the assumptions stemming from decisions made by public authorities which aims at solving public problems, supplying public goods and meeting social needs."[5] Politics is an activity without a defined end; therefore, it constitutes a challenge in evaluation and analysis. However, one must remember that public policy forms a whole which consists of objectives (strategy, mission) as well as plans of their accomplishment (programme) and implementation (project). Strategies, programmes and projects are defined in time, so their examination, evaluation and analysis is easier.

To define the subject of the undertaken considerations more precisely, one must explain the difference between the three abovementioned activities. Ryszard Szarfenberg writes: "Examination aims at discovering and describing empirical facts as well as testing the hypotheses which state such facts or the connections between them. Evaluation consists of systematic investigations aimed at assessing the quality and value of the subject… Analysis focuses on formulating recommendations and indications concerning the subject."[6] Therefore,

publiczna. Teoria. Jakość. Dobre praktyki. Red. J. Osiński, I. Zawiślańska. Warszawa 2016, p. 39—60; P. Scholten: *Framing Immigrant Integration: Dutch Research-Policy Dialogues in Comparative Perspective*. Amsterdam 2011; P. Scholten, H. Entzinger, R. Penninx: *Research-Policy Dialogues on Migrant Integration in Europe. A Conceptual Framework and Key Questions*. In: *Integrating Immigrants in Europe. Research-Policy Dialogues*. Eds. P. Scholten, H. Entzinger, R. Penninx, S. Verbeek. Dordrecht 2015; Y. Surel: *The Role of Cognitive and Normative Frames in Policy-making*. "Journal of European Public Policy" 2000, Vol. 7, Issue 4, p. 495—512; R. Szarfenberg: *Ewaluacja i analiza polityki społecznej*. W: *Polityka społeczna. Podręcznik akademicki*. Red. G. Firlit-Fresnak, M. Szylko-Skoczny. Warszawa 2008, p. 127—141; A. Zybała: *Polityki publiczne*. Warszawa 2012.

[4] A. Zybała: *Polityki publiczne*…, p. 13.

[5] M. Sakowicz: *Analiza polityki publicznej*…, p. 41.

[6] R. Szarfenberg: *Ewaluacja i analiza*…, p. 127.

evaluation is an assessing activity going beyond the scope of examination, while analysis additionally includes the practical aspect of the examination and evaluation subject. Accordingly, evaluation is a defined and planned activity which meets the objectiveness criteria and is governed by scientific discipline in the scope of the applied methodology of information collection and assessment. Analysis produces recommendations the justification of which "requires at least an evaluation of alternative solutions and comparison of their results."[7]

Evaluation and analysis play a special role in so-called procedural approach to public actions, according to which a cycle of public actions spans at least three stages: (1) identification of the problem and assessing the legitimacy of a public intervention aimed at solving it; (2) defining the principles and objectives of the projected public policy; and (3) determining the instruments and resources necessary to achieve the assumed objectives and assessing their legitimacy.[8] At the same time, evaluation and analysis support the building of evidence-based policy. Karol Olejniczak and Stanisław Mazur remark that such conception assumes the use of "high-quality information, data and knowledge coming from various sources: knowledge of experts, domestic and international research, statistics, stakeholders' opinions, consultation and evaluation of the already accomplished policies."[9]

Evaluation is based on the use of previously defined assessment criteria and the resulting indicators. Szarfenberg indicates that "the source of assessment criteria is values"[10] and the universal evaluation values include effectiveness, efficacy[11], accuracy, usefulness, durability and coherence. The policy (strategy, programme or project) assessment obtained *via* evaluation may be the source of legitimisation, demonstration or confirmation of accountability and justification of the undertaken public actions.[12] It can also be used to delay or "blur" unwanted reforms or introduce political control over other statutory authorities.[13] In this context it is important to determine who initiates the evaluation process and controls whether, how and to what extent its results will be used. One must remember that "the state is not a homogeneous player in the public policy be-

[7] Ibidem, p. 128.

[8] M. Sakowicz: *Analiza polityki publicznej…*, p. 42, 51—54.

[9] One must note here that evaluation concerns not only "the already accomplished policies", but also projected ones (e.g. *via* assessing the regulation effects) and those being implemented at the moment. S. Mazur, K. Olejniczak*: Rola organizacyjnego uczenia się we współczesnym zarządzaniu publicznym*. W: *Organizacje uczące się. Model dla administracji publicznej.* Red. K. Olejniczak. Warszawa 2012, p. 38.

[10] R. Szarfenberg: *Ewaluacja i analiza…*, p. 131.

[11] Effectiveness and efficacy are the main praxeological values.

[12] J. Turnpenny, C.M. Radaelli, A. Jordan, K. Jacob: *The Policy and Politics of Policy Appraisal: Emerging Trends and New Directions.* "Journal of European Public Policy" 2009, Vol. 16, Issue 4, p. 641.

[13] Ibidem, p. 642.

cause its authorities accomplish various interests and strive for various goals."[14] Representatives of scientific circles, analysts and experts whom governments may commission to carry out an evaluation also have their own interests and goals, whether conscious or not. In this context, carrying out an evaluation may mean that the evidence it produces might help one overcome the process of policy formulation based on interests instead of facts as well as integrate the cross-cutting issues and increase the cooperation among the players. In line with another viewpoint, an assessment may lead to the pluralisation of politics and public administration because it can constitute a starting point for opening new areas of public deliberations concerning various alternative options of public interventions. To sum up, both policy evaluation and analysis are manifestations of the political behaviour of institutions and other political players.

The question whether politics can be made more "rational" by applying analytical techniques and tools remains open. One issue related to that question is the use of scientific and expert knowledge by politics in general. This brings to mind another question: What do decision makers want — legitimisation or profit maximisation? It seems that knowledge can be used for various purposes — symbolically, instrumentally or to provide explanations[15] — and statutory authorities do not always act rationally.

In this context one should note that the end of the 20th century saw a turn in the Western research on public policy: researchers began to underline the influence of ideas, general principles, social norms, values and notions on social evolution and the functioning of the state.[16] According to that approach, cognitive and normative elements play an important role in the way political players understand and explain the world. The analysis concerns, among others, the creation process and the role of cognitive and normative frames in formulating the assumptions of a public policy and its implementation. Those frames fulfil an integrating function in a given community. Moreover, since they create the world view and define lawful, legitimised practices, they seem dependent on the mechanisms of identity determination, power distribution and their ability to manage social tensions.[17]

Referring the above to the integration policy of a state, one must first highlight that evaluation and analysis should concern a certain desired final state: the integration of foreigners. The way the latter is defined depends first and foremost on political decision makers,[18] while the defining process itself is a manifestation of ruling — therefore, it is a political act. Second, one can expect

[14] M. Pawlak: *Polityki publiczne wobec migracji*…, p. 295.

[15] M. Pawlak: *Wykorzystanie wiedzy naukowej i eksperckiej*…, p. 105.

[16] Y. Surel: *The Role of Cognitive and Normative Frames*…, p. 495.

[17] Ibidem, p. 500.

[18] Science can simultaneously develop its own definitions of this concept — and this is what happens indeed.

that an integration policy will be accomplished based on a specific strategy and as part of programme(s) and projects which will be examined, evaluated and analysed. One should stress that the situation where an integration policy is not related to any strategy, programme or implementation project may also stem from a thought-out political decision. However, this does not equal lack of politics: a purposeful omission is a political action, too. Third, an integration policy evaluation will be based on specific indicators[19] and will concern both the policy accomplishment process itself and the achieved results. Fourth, one can distinguish between *ex-ante*, on-going and *ex-post* evaluation as well as external and internal evaluation also in the case of integration policies. Moreover, integration policies are influenced by the social and cultural norms and frames which dominate in a given community at a certain period.

Evaluation and analysis of integration policies: The European union law and practice

Legal issues

The issues related to the shaping and implementation of integration policies concerning foreigners residing in the territory of a given Member State belong to the competence of that MS. However, since the moment of signing the Treaty of Lisbon in 2007, according to par. 4 of Article 63a, "[the] European Parliament and the Council . . . may establish measures to provide incentives and support for the action of Member States with a view to promoting the integration of third-country nationals residing legally in their territories, excluding any harmonisation of the laws and regulations of the Member States."[20] Exercising this right, the European Commission (EC) published the Action Plan on the Integration of Third-Country Nationals (2016),[21] in which it referred to the Common

[19] One can encounter single-criterion and multi-criteria (single-indicator and multi-indicator) evaluation.

[20] *Treaty of Lisbon amending the Treaty on European Union and the Treaty establishing the European Community* (2007/C 306/01) — https://eur-lex.europa.eu/legal-content/PL/TXT/HTML/?uri=CELEX:12007L/TXT&from=EN (accessed: 6.02.2019).

[21] *European Commission, Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions, Brussels, 7.6.2016,* COM (2016) 377 final — https://ec.europa.eu/home-affairs/sites/homeaffairs/files/what-we-do/policies/european-agenda-migration/proposal-implementation-package/docs/20160607/communication_action_plan_integration_third-country_nationals_en.pdf (accessed: 6.02.2019).

Basic Principles for Immigrant Integration Policy (2004)[22] and the Common Agenda for the Integration of Third-Country Nationals, published by the EC in 2011.[23] The Common Basic Principles place special emphasis on the integration of foreigners with the labour market, knowledge of the language spoken in the host state as well as education both of the immigrants themselves and their children residing with them in the target state of migration. Moreover, the document highlights, among other things, the necessity of providing immigrants with access to institutions, goods and services equal to the access possessed by the European Union citizens. It also underlines the importance of involving them in the democratic process. Furthermore, it stresses the necessity of developing evaluation objectives, indicators and mechanisms to adjust the integration policy, evaluate the integration progress and exchange information more effectively.[24] The Common Agenda, in turn, states that "close cooperation between the different levels of governance is important to coordinate the provision, financing and evaluation of services" offered as part of the actions aimed at immigrant integration.[25] It also refers to a pilot study by Eurostat entitled *Indicators of Immigrant Integration*[26] and announces that the EC will apply the integration "indicators" determined in four areas: employment, education, social inclusion and active citizenship.[27] Those indicators were supposed to be used for "monitoring the results of integration policies in order to increase the comparability of national experiences and reinforce the European learning process."[28]

The Commission Plan of 2016 provides information on the challenges and barriers to integration as well as a list of key political priorities and integration-strengthening tools. The political priorities include:

— measures taken before the immigrant leaves the country of origin / arrives at the target state of migration;
— education;

[22] *Council of the European Union Press Release, 2618th Council Meeting, Justice and Home Affairs*, 14615/04 (Presse 321), Brussels, 19 November 2004 — http://www.consilium.europa.eu/ueDocs/cms_Data/docs/pressData/en/jha/82745.pdf (accessed: 6.02.2019).

[23] *European Commission, Communication from the Commission to the European Parliament, the Council, the European Economic and Social Committee and the Committee of the Regions. European Agenda for the Integration of Third-Country Nationals*, KOM/2011/0455 final — https://eur-lex.europa.eu/legal-content/PL/TXT/HTML/?uri=CELEX:52011DC0455&from=EN (accessed: 6.02.2019).

[24] The provision on evaluation is included in par. 19 of the Common Principles.

[25] Par. 2 "Improvement of multi-level cooperation".

[26] *Eurostat: Indicators of Immigrant Integration. A Pilot Study*. Eurostat Methodologies and Working Papers 2011 — https://ec.europa.eu/eurostat/documents/3888793/5849845/KS-RA-11-009-EN.PDF/9dcc3b37-e3b6-4ce5-b910-b59348b7ee0c (accessed: 6.02.2019).

[27] The indicators as such reflected the key integration areas expressed in the Common Principles.

[28] *Eurostat: Indicators of Immigrant Integration*...

— integration into the labour market and access to vocational training;
— access to basic services (e.g. apartments, health care);
— active participation and social inclusion.

Concerning specific tools, the EC lists further support of coordination among the Member States (e.g. replacing the network of the National Contact Points on Integration with the European Integration Network, supporting the development of the European Migration Forum established to replace the European Integration Forum) and ensuring financing *via* a 2014—2020 long-term programme and specific funds (including the Asylum, Migration and Integration Fund). The Commission highlights in the document that it will continue developing the knowledge of integration results on the European level, including *via* monitoring its results on the local level in cooperation with the Member States and with the involvement of the Organisation for Economic Co-operation and Development (OECD),[29] and cooperating more closely with other significant players such as the Fundamental Rights Agency (as part of the EU-MIDIS II project, among other things[30]).

In the historical perspective, the development of integration policies in the European Union Member States was related especially to public administration activity on the local level. However, the issue gradually became so important that at the beginning of the 21st century most European countries already possessed an integration policy.[31] Concerning the policies directed at immigrants, the integration model presently dominates in the European Union Member States.[32] At the same time, "the public interest in migration is so huge that politicians prefer to act according to their voters' common ideas about migration than scientific evidence when they develop public policies."[33] The application of scientific and expert knowledge, if any, is increasingly often instrumental. Simultaneously, assimilationism and post-nationalism is becoming more noticeable among the basic frames defining immigrant integration as distinguished by Peter Scholten, i.e. assimilationism, multiculturalism, differentialism, universalism, transnationalism and post-nationalism.[34]

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[29] In 2015, the OECD published a report entitled "Indicators of Immigrant Integration 2015 — Settling In", which resulted from the cooperation with the European Commission (Directorate-General for Migration and Home Affairs).

[30] The project included a survey concerning discrimination which was conducted among immigrants and ethnic minority representatives in all the Member States. More information about the survey and its results is provided on the website of the Fundamental Rights Agency — http://fra.europa.eu/en/publication/2017/eumidis-ii-main-results (accessed: 6.02.2019).

[31] P. Scholten, H. Entzinger, R. Penninx: *Research-Policy Dialogues…*, p. 1.

[32] M. Pawlak: *Polityki publiczne wobec migracji…*, p. 291.

[33] Ibidem, p. 303.

[34] P. Scholten: *Framing Immigrant Integration…*, p. 38—42.

Evaluation and analysis attempts — selected examples

The most important attempt at developing a universal mechanism of integration policy assessment i.a. in EU Member States remains the international project entitled "The Migrant Integration Policy Index" (MIPEX).[35] The fourth and last edition of the project was co-financed using EU funds and implemented in the years 2013—2015. It was headed by the Barcelona Centre for International Affairs (CIDOB) and the Migration Policy Group (MPG) from Brussels. The main objectives of the project included:

1) identification and measurement of the results of integration, integration policies and other contextual factors influencing the efficacy of the policies;
2) verification of the access to rights and the possibility of taking advantage of the designed solutions and instruments by the real and potential beneficiaries of integration policies in key areas: employment, education, political participation, access to citizenship, family reunion, health, access to long-term residence and anti-discrimination actions;
3) collection and analysis of good-quality evaluations of the integration policy effects.

In the last edition of the MIPEX project, policy assessment was based on 167 indicators in the eight abovementioned areas. The examination has shown that the integration policies of the analysed states are on average ambivalent concerning granting the immigrants equal rights and possibilities and that the number of facilitations is only slightly higher than the number of obstacles on the way to full immigrant participation in the economic, social and political life. In general, immigrants face greater integration obstacles in the new target states of migration, while the bigger, older and wealthier states, including those traditionally viewed as immigration states, offer them greater facilitations and possibilities.

The evaluation as part of MIPEX was initiated and conducted by the scientists working in the abovementioned organisations. The application of its results by public decision makers of the individual EU Member States is debatable. Still, the administration in certain EU states, e.g. Great Britain and Germany, implements its own evaluation programmes.

Great Britain is a country with rich migration tradition which dates back to the British Empire. In comparison with other EU states with colonial past, that country experienced the largest influx of immigrants from the Commonwealth of Nations. One result of that process was the adoption of a multiculturalism

[35] See: http://www.mipex.eu (accessed: 6.02.2019). The project covered all the European Union Member States, Australia, Iceland, Japan, Canada, South Korea, New Zealand, Norway, United States of America, Switzerland and Turkey.

policy. According to the MIPEX evaluation, the integration policy of Great Britain is currently considered as moderately favourable.[36]

The main player responsible for the integration policy in Great Britain is Home Office. In 2004, it ordered Alistair Ager and Alison Strang[37] to develop indicators of integration concerning the integration of international protection beneficiaries. The researchers suggested 10 indicators grouped in four areas:[38]

1) means and markers, which include employment, accommodation, education and health;
2) social bonds, which include social responsibilities inside the refugee community, social bridges ensuring the connection with other communities and social links with the institutions of power and impact;
3) facilitators, which include knowledge of language and culture as well as safety and stability;
4) foundation, which covers rights and citizenship.

The report by Ager and Strang remains one of the most readily used proposals of evaluation frames for the integration policy concerning international protection beneficiaries in Great Britain as well as one of the first such attempts on the EU scale.

Regarding Germany, one should note that the country has an immigration status, but foreigner integration was included in the immigration law relatively late, in 2005. Moreover, a coherent integration act entered into force in 2016 as a consequence of so-called migration and refugee crisis in 2015. Due to the political system of the country, the integration policy in Germany is also accomplished on the level of individual constituent states and cities. For example, Berlin (2010), North Rhine-Westphalia (2012) and Baden-Württemberg (2015) have adopted solutions aimed at supporting the integration efforts made on the federal level. One should note that the German integration policy (the individual integration actions and their effects) achieved a relatively good result in the evaluation conducted within the MIPEX project.[39]

The main player responsible for the integration policy in Germany on the federal level is the Federal Office for Migration and Refugees (BAMF). The Office regularly assesses the integration actions carried out, including i.a. questionnaires, satisfaction surveys and financing of external surveys. An example of the latter is a survey entitled "Selected Groups of Migrants in Germany" (RAM),

[36] See: http://www.mipex.eu/united-kingdom (accessed: 6.02.2019).

[37] Their project was financed by the European Refugee Fund.

[38] A. Ager, A. Strang: *Indicators of Integration: Final Report*. London 2004 — http://webarchive.nationalarchives.gov.uk/20110218141321/http:/rds.homeoffice.gov.uk/rds/pdfs04/dpr28.pdf (accessed: 6.02.2019).

[39] See: http://www.mipex.eu/germany (accessed: 6.02.2019).

which was last carried out in the years 2006/2007.[40] The survey analysed the situation of selected groups of immigrants in terms of education, employment and financial situation, family structure and linguistic skills as well as social integration. It also utilised the indicators concerning accommodation conditions, health, crime, culture and religion, naturalisation, attitude toward immigrants and xenophobia as well as identification and bond with the sending and host states. As field researchers indicate, the Office used the obtained knowledge, including scientific and expert knowledge, to legitimise its role as a competent organisation in the shaping of the integration policy.[41]

Attempts of expert evaluation of the integration policy concerning international protection beneficiaries are also made in Poland, where immigrant integration is a relatively new and narrow issue and therefore its shaping is largely influenced by drawing on the standards implemented in Western European countries.[42] Poland does not currently possess a general strategy or programme concerning foreigner integration. The main group taking advantage of a dedicated programme are international protection beneficiaries. The non-governmental organisations which carry out their own evaluations of that programme point in particular at the insufficiency of the support in terms of its availability time and level.[43] Studies regarding integration policy evaluation in general are also drafted; they point at specific integration barriers concerning access to the labour market, language learning and access to apartments.[44]

One must remark here that although the substance of the Polish integration policy has not been significantly altered since 2015, the relevant rhetoric of the actors responsible has changed. First and foremost, this means placing emphasis on different aspects of the migration policy in general and the resulting increased leaning toward protecting the "security interests" of the state (and not only its economic or social interests) demonstrated by the main authority responsible for the migration policy — the Ministry of the Interior and Administration (MSWiA). Consequently, not only the integration policy frame, but also the nature of integration actions may change. This is suggested by the government members' statements, such as the one uttered by the then Deputy Minister of the Interior and Administration Jakub Skiba in an interview conducted by "Biuletyn Migracyjny": "The [integration policy] model promoted by the previous government and adopted from the Western countries was as follows: let us

[40] The survey results are available in English on the following website — http://www.bamf.de/SharedDocs/Projekte/EN/DasBAMF/Forschung/Integration/repraesentativuntersuchung-2006-2007.html?nn=1448998 (accessed: 6.02.2019).

[41] M. Pawlak: *Wykorzystanie wiedzy naukowej i eksperckiej…*, p. 113.

[42] Ibidem, p. 107.

[43] J. Klavier, A. Piłat, D. Potkańska, A. Sitko: *Local Responses to the Refugee Crisis. Reception and Integration.* Warszawa 2016.

[44] *Bieg przez płotki. Bariery na drodze do integracji migrantów w Polsce.* Red. A. Mikulska, H. Patzer. Warszawa 2012.

introduce new elements into the society and put the emphasis on increasing the absorption capacity, i.e. on lowering the distrust level of the society toward the newcomers from abroad… We look at it pragmatically and reckon that such approach leads nowhere… In our opinion, successful integration means that the newcomers know and understand the culture of the host state."[45]

Even though no general integration strategy exists and the MSWiA questions the purpose of the actions conducted thus far, Poland has been carrying out a project entitled "National Integration Evaluation Mechanism. Measuring and improving integration of beneficiaries of international protection"[46] (NIEM) since 2015. The project is financed by the Asylum, Migration and Integration Fund and was directly included in the AMIF National Programme as a so-called specific action. The project leader is the Institute of Public Affairs and the consortium includes fifteen partner organisations (universities, think-tanks and non-governmental organisations) from various EU Member States, including the abovementioned CIDOB and MPG. The main objective of the project is to develop an evaluation mechanism for the integration policies directed at international protection beneficiaries, which is planned to be based on more than 150 indicators grouped into four main areas:

1) general conditions of integration;
2) the legal dimension of integration (residence, family reunion, access to citizenship);
3) the social and economic dimension of integration (accommodation, employment, vocational training and other training, health, social security);
4) the social and cultural dimension of integration (education of children, language learning and knowledge of the society, strengthening of the participation in the social and political life).

The project is scheduled to last till the end of 2020. If accomplished, it will provide a tool for both *ex-post* and on-going evaluation, i.e. facilitating evaluation, which aims at improving a programme (policy, project) and its accomplishment. The readiness and willingness of Polish and foreign administrations to use that tool remains an open issue.

Conclusion

No general mechanism of integration policy evaluation and analysis has been developed yet, neither on the EU scale nor in any Member State. One must re-

[45] R. Stefańska, M. Szulecka: *"Pragmatycznie, a nie ideologicznie" — o polityce migracyjnej Polski.* "Biuletyn Migracyjny" 2016, nr 55.

[46] See: http://www.forintegration.eu/ (accessed: 6.02.2019).

member that foreigner integration is a national competence. At the same time, various initiatives are taken on the national and supranational level to develop an integration policy evaluation tool which would facilitate integration policy analysis and introduction of appropriate corrections. The proposed solutions are based on a number of indicators and one can notice a tendency to extend their list systematically. Evaluation frame creation is often originated by the state, but evaluation and analytical actions are initiated also by other players such as non-governmental organisations or academic circle representatives.

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Agnieszka Kulesa is a PhD student at the Warsaw School of Economics and an economist in the Centre for Social and Economic Research (CASE). Her scientific interests focus on the issues related to international migration and the labour market.

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Hungarians in the Spanish Legion?

Węgrzy w Legionie Hiszpańskim?

János Besenyő*

Abstract

The research was conducted on the activities of Hungarian emigrants in the Spanish Legion. It was assumed that the Hungarians provided an important manpower supply for the Spanish Legion and the Spanish army, including in the Spanish Civil War. Examining the facts, it can be concluded that the Hungarian soldiers' participation in the earlier North African wars and the Spanish conflicts had an important effect on the area's geopolitical situation, and it is possible to assume that veterans played a relevant role in the ongoing military and intelligence war between the West and the East.

Key words: Spanish Sahara, Spanish Legion, Hungarian Royal Gendarme Veterans' Association, Rif War, Western Sahara.

Abstrakt

Badania, jakie przeprowadzono, dotyczyły działalności emigrantów węgierskich w Legionie Hiszpańskim. Założono, że Węgrzy zapewnili znaczne zasoby ludzkie dla Legionu Hiszpańskiego i armii hiszpańskiej, głównie podczas hiszpańskiej wojny domowej. Analizując fakty, można stwierdzić, że udział żołnierzy węgierskich we wcześniejszych wojnach na terenie Afryki Północnej i w hiszpańskich konfliktach zbrojnych miał istotny wpływ na sytuację geopolityczną tego obszaru. Można również przyjąć, że weterani odegrali istotną rolę w trwającej wojnie militarnej i wywiadowczej między Zachodem a Wschodem.

Słowa kluczowe: Sahara Hiszpańska, Legion Hiszpański, Węgierskie Królewskie Stowarzyszenie Kombatantów Żandarmerii, wojna hiszpańsko-marokańska, Sahara Zachodnia

* Doctoral School for Safety and Security Sciences, Óbuda University, Hungary; (e-mail: besenyo.janos@phd.uni-obuda.hu); https://orcid.org/0000-0001-7198-9328.

The Legion

The creation of the Spanish Legion (*Tercio de Extranjeros*)[1] was already decided on in 1919 by the Spanish military leadership, but it was ordered only on 28 January 1920 by a royal decree of the ruling king, Alfonso XII.[2] The plan was that the badly performing, poorly trained, heavy loss-suffering, mainly conscripted corps fighting on the African front should be replaced by "official", well-trained soldiers.[3] They hoped that this military unit created in the French style would be at least as successful as its model, the French Foreign Legion. The Legion came under the supervision of the then Minister of War, José Villalba Riquelme, and Lieutenant Colonel José Millán-Astray Terrenos was appointed as its first commander, who started in that same year with the creation of the first battalion (*bandera*) in Ceuta. Although some of the Spanish Chiefs of the Defense High Command and the officers serving in the motherland was against the establishment of the Legion, the new commander was not disturbed by this, and being aware of the solid royal support he created 4 further battalions,[4] which were filled out mainly with Spaniards originating from the earlier Latin-American Spanish colonies (for example Cuba) and in a smaller degree with foreign citizens as well.[5] The battalions were composed of a command company, two infantry companies and a machine-gun company. The Legion's first base was

[1] The Tercio was the war formation of the Spanish infantry from the second third of the 16th century to the middle of the 17th century. The use of the word "third" comes from the meaning that it represented the third of the all-time Spanish infantry. The Tercio's significance lies in that it was the first military organization that combined spears/pikes and firearms in one corps in the infantry. The tercio — as a separate tactical unit — represented roughly the power of one regiment (3000 men). It was divided into 10 companies, of which 8 consisted of 200 pikemen, 100 arquebusiers (infantrymen using a smaller bore firearm than a musketeer) and 20 musketeers. This kind of unit secured for almost a century the invincibility of the Spanish infantry. J. Szabó: *Hadtudományi lexicon*. Budapest 1995, p. 1319.

[2] The predecessor of the Spanish Legion — which was called by the same name — was established on 28 June 1835 from the soldiers transferred by the French government from the French Foreign Legion. The unit's main task was to support Isabella II of Spain in the First Carlist War. The Legion — which fulfilled its duty and suffered great losses — was disbanded on 8 December 1938.

[3] J.E. Alvarez: *The Betrothed of Death. The Spanish Foreign Legion During the Rif Rebellion, 1920—1927*. Westport CT 2001, p. 13.

[4] Until 1921 the Legion consisted of only 3 battalions, yet because of the Rif War, during which it was the Legion that won almost the only victories, it was given the opportunity to create 2 more battalions. J.E. Alvarez: *The Betrothed…*, p. 59.

[5] The first 200 men accepted into the Legion's ranks were persons of mainly Spanish and also early Spanish colonial origin (Latin-America, the Philippines, etc.). The foreigners were represented by one Chinese, 3 Japanese, a Russian prince, a German, an Austrian, an Italian, 2 French, 4 Portuguese, a Maltese, a Belgian and an African American from New York. J.E. Alvarez: *The Betrothed…*, p. 19.

formed in Ceuta, because the primary fields of the organization's deployment were the Spanish African territories, and its first mission was in Spanish North-Africa, in the Rif War (1920—1926). This war was fought in what was then Spanish Morocco: under the leadership of Abd el-Krim, the Rif tribes revolted against the Spanish colonizers, and they proclaimed their own state. This the Spanish couldn't tolerate, and they dispatched their corps against the Berbers. A cruel war broke out between the two forces.

For their valor in combat, the Legion gained the name Moroccan Tercio (*Tercio de Marruecos*); nevertheless, after the Rif War they were only referred to as the Tercio. At that time they were one of the best trained, best equipped, best supplied and most renowned units of the Spanish Army.[6] The world got to know at this time the name of the later Spanish president, Franco Bahamonda, who himself took part in the creation of the Legion, and as the commander of the first battalion he participated in almost all the battles of the 1923—1927 war, and had personally a hand in the defeat of Abd el-Krim.[7] The legionnaires acquired their better-known name during the Spanish Civil War (1937); since then everybody has called them the Spanish Legion or Spanish Foreign Legion. At that time the organization already consisted of 18 battalions and a further 3 auxiliary units — armored, sapper and special operations. One of the most renowned leaders of the Legion was the later dictator Francisco Franco, who was the commander of the first battalion, and who later became second-in-command of the entire corps. His unit — with the help of the Spanish-friendly Moroccan tribesmen's units (Fuerzas Regulares Indígenas) — fought throughout the Rif War, in which they won an outstanding reputation as soldiers who were loyal to the end to their officers, and who followed orders under any circumstances. This is the reason why their units were sent to suppress the Asturian Miners' Strike of 1934 (October) instead of units of the regular Spanish Army, many of whose soldiers sympathized with the miners.[8]

The Legion under the leadership of Lieutenant Colonel Juan Yagüe played a large part in the Spanish Civil War, where they fought on the side of the anti-republican general, Francisco Franco, with the Moroccan units. The Legion units were the most trained, real wartime-experienced troops of the Spanish Army joined to the putschists' side, and achieved significant results against the regular, conscripted soldiers. With their help, the rebels could gain a foothold first on the African continent, then in the motherland as well, and in fact they conquered more and more areas from the republican forces. During the Civil War the unit suffered serious losses in relation to its size. Among the legion-

[6] J.E. Alvarez: *The Betrothed*…, p. 166.

[7] Th.P. Anderson: *The French Intelligentsia and the Spanish Civil War, 1936—1939. Dissertations.* Chicago 1965, p. 12.

[8] J.E. Alvarez: *The Betrothed*…, p. 223.

naires 7,671 were killed, 776 went missing and 29,000 were wounded. These losses are even greater considering that the Legion never fielded more than 10,800 soldiers at one time. In the Civil War, which lasted almost 3 years, the Legion's enlistment changed completely 4 times. For example, the 4th battalion of the 13th division, with its 600 fighting soldiers, suffered altogether 10,000 losses, which meant that it had to be reorganized 17 times. The legionnaires accounted for 12.5% of the nationalist side's total casualties.[9] Despite this, after Franco's victory the Legion's numbers were significantly reduced and the remaining units were sent back to their barracks in Africa. The Legion henceforth consisted of 4 *tercios* (regiments), and their organization became more or less the same as it is today.

In the Second World War, many units of the Legion fought in the ranks of the "Blue Division", which was lent to the Germans, where it could gain more military experience. After the Second World War came the hard lesson. Although the Spanish were exempt from prosecution for their neutrality, the Francoist regime was quarantined, and it started to lose its African colonies one by one. First it lost Spanish Morocco in 1956, so the troops stationed there went to Ifni, Ceuta and Mellila, as well as to Spanish Sahara. In the following years the soldiers of the Legion took part in every local battle until the withdrawal of the Spanish in 1976. There had been conscription into the infantry of the corps from the Sahrawi tribes, but their proportion reached only a few percent. The training and the equipment of the units was very good, and in its battle order there were French AMX-30 and AML-90 type medium tanks and some units deployed Heinkel 111 bombers along with camel fighters. The third *tercio* of the Legion was stationed in El-Aaiun, while the fourth *tercio* was in Villa Cisneros.[10]

In "The Forgotten War" (1957—1958) the Moroccans attacked Ifni, which the Legion's units successfully defended with the help of the local auxiliary forces, but despite this the enclave was given to the Moroccans. Thereafter, the units of the Legion were reassigned to Spanish Sahara, where they were reorganized and reinforced.

However, they were not able to rest here, because the Sahrawis also wanted an independent state, and in 1967 they created their own political movement, the Saharan Liberation Organization (Harakat Tahrir saguia el-Hamra wa Oued ed-Dahab),[11] whose first leader was Mohamed Sidi Ibrahim Bassiri. Although the organization wanted to achieve independence by peaceful means, soon a bloody battle took place between them and the Legion's units. Shortly after —

[9] "Magyar Katonai Szemle" 1940, 10/2, nr 5, p. 561—562.

[10] J. Besenyő: *A nyugat-szaharai válság egy magyar békefenntartó szemével*. Pécs 2012, p. 64.

[11] S.C. Saxena: *Western Sahara, No Alternative to Armed Struggle*. Delhi 1995, p. 113—114; S. Zunes, J. Mundy: *Western Sahara. War, Nationalism and Conflict Irresolution*. Syracuse 2010, p. 103.

on 10 May 1973 — the Sahrawis formed the Polisario (Frente Popular para la Liberacion de Saguia El-Hamra y Rio de Oro) with the aim of the total liberation of Western Sahara.[12] The new movement carried out its first action 10 days later, on 20 May, when its members attacked the Spanish military checkpoint in El-Khanga.[13] In short order they executed other attacks against smaller military installations including Mahbas, Echderia, Bir Lehmar, Tifariti, Hauza, Amgala and Guelta Zemmour, and they also assaulted the phosphate mines in Bou Craa, where they damaged the phosphate-carrying facilities linking these barracks to the port. At that time, the Spanish thought of Western Sahara as their own, and they mobilized the units of the military to settle matters with the new armed group. In May 1974 they began the "Barrido" operation (Operacion Barrido), during which they deployed military helicopters beside the Policia Territorial and the Tropas Nomadas against the Polisario's militants. Whilst the organization suffered heavy losses, it couldn't be eliminated; in fact, more and more Sahrawis joined it, among whom were many who had served in the Legion or in the Spanish military, as well as in the police organizations composed of locals. Yet not only the Sahrawis, but also Morocco and Mauritania laid claim to the area of Spanish Sahara, which the Spanish — who were unable to hold on to the colony — gave to the two neighboring countries, which resulted in a war that lasted until 1990 (and which hasn't fully ended even today) between the natives, Mauritania[14] and Morocco. Finally, the units of the Legion were entirely withdrawn from Western Sahara in 1976, and the larger part of the troops were restationed on the Canary Islands. With this the organization's active service largely ended, though smaller units remained in Ceuta and Mellila. In 1987 the Legion was reshaped, so that foreigners (except for the Spanish speaking citizens of former colonies) were not allowed to serve in it anymore. In 2001 foreigners could sign up again in the Legion.[15]

[12] Their founders named the organization at first "Frelisario", but they changed their name soon to "Polisario".

[13] D.L. Price: *Morocco and the Sahara. Conflict and Development*. "Conflict Studies" 1977, no 88, p. 5—6.

[14] Mauritania was defeated by the natives and in 1978, she made peace by relinquishing all of her territorial claims. T. Hodges: *Western Sahara, The Roots of a Desert War*. Westport CT 1983, p. 267—276.

[15] H. Driessen, W. Jansen: *Staging Hyper-masculinity on Maundy Thursday. Christ of the Good Death, the Legion and Changing Gender Practices in Spain*. "Exchange" 2013, No 42, p. 86—106.

Hungarian volunteers in the Legion

Although most Hungarians who signed up to foreign military duty joined the French Foreign Legion, quite a few tried their luck in the Spanish Legion as well, though a lot less data is available about them than about those serving in the French Foreign Legion.

Among the first Hungarian legionnaires was Lajos Matuss, who couldn't find any work close to home, so he tried his luck abroad. Since it wasn't easier to get employment anywhere, he went to the Spanish Legion's recruitment office. Matuss got into the Legion because of bread-and-butter worries and he served in the fortress of Ceuta and took part in the battles against the Rif military leader, Abd el-Krim.[16]

At that time also serving in the Legion was Lajos Imerle from Esztergom, who went into the hell of the First World War from the desks of the Training-college. First, he served as an ensign, then as a first lieutenant, when he was taken prisoner by the Russians and was deported to Siberia, from where he got home with great difficulty. At home he didn't find a place and soon he volunteered for the Legion, where he began service as a regular soldier, then after only three years attained the highest non-commissioned officer rank (sub-lieutenant). In his course of service he received several recognitions and decorations, and after his enlistment expired he joined another corps and served in the Spanish gendarmerie in Tétouan.[17]

The Hungarian state news agency (Hungarian Telegraph Bureau — abbreviated as MTI) prepared an account on another legionnaire, Jenő Jakus.[18] Jakus carried on a communist propaganda campaign in the villages near Szeged, so he came to the attention of the police. According to the document for his role in the 1919 communist events, he was sentenced to 10 years of prison time, which he began serving in the Hungarian Prison in Szeged (the so-called "Csillag-

[16] Hungarians fought not only in the Spanish Legion but also in the army of Abd el-Krim as deserters, thus the Hungarians could even face each other on the battlefield. D. Sasse: *Franzosen, Briten und Deutsche im Rifkrieg 1921—1926, Spekulanten und Sympathisanten, Deserteure und Hasardeure im Dienste Abdelkrims*. München 2006, p. 90, 104, 110. The former Hungarian first lieutenant Sándor Sáski fled to the Arab rebels: Géza Paksy, frigate-lieutenant can't commission his West-African flying company because of the Rifqabil-wars. "Kis Újság", 30 May 1934, p. 7, "Kis Újság", 29 September 1925, p. 5.

[17] *Imerle Lajos magyar tanító spanyol csendőr Afrikában*. "Pesti Napló", 16 September 1928, Sunday Issue, p. 35.

[18] "Magyar Távirati Iroda", 15th broadcast, 30 July 1931, 13 hours 35 minutes — https://library.hungaricana.hu/hu/view/KulfBelfHirek_1945_11_1__001-123/?pg=411&layout=s&query=idegenl%C3%A9gi%C3%B3 (accessed: 5.08.2017). To the same case also relates: "Friss Újság", 31 July 1931, p. 8, the "Budapesti Hírlap", 31 July 1931, p. 4, and the "Népszava", 31 July 1931, p. 12.

börtön"), but he successfully escaped, then emigrated from the country. Firstly, he served in the French Foreign Legion, then from there relocated to the Spanish Legion, from which he was „discharged". After that he stayed in France, then returned to Hungary, where he came again to the attention of the police, because he applauded the Hungarian Soviet Republic, and verbally abused the ruling government. The policemen caught him, but he escaped from custody, was captured only a few days later, and imprisoned again.

In 1926 József Bakay Smolka entered the Legion, first serving in Mellila. He was first promoted to the rank of lance-corporal, then in 1930 he became sergeant. In the Civil War, like most of the legionnaires, he fought on the side of Franco. On the 11 August 1936 Extremadura Operation his battalion achieved outstanding results, in which he personally played a huge role. In November 1936, at the Siege of Alcazár, and again not much later at Madrid, he was slightly injured. In recognition of his merits, he received a decoration. A few days later he was again injured, and during his hospitalization he was promoted to the rank of ensign. In 1937, he was ordered to the headquarters of the 2nd Legion as an acknowledgement for his endurance on the fronts of Andalusia and Extremadura. In 1946, he was still in the Legion, when in recognition of his continuous duty for 15 years Franco awarded him 1,500 pesetas.[19]

Again, at the time of the Civil War several Hungarians served in the Legion. One of them was Tibor Liszbon, about whom we know only that he was promoted to the rank of sergeant in April, 1937 and lost his life during the War. József Borsica Isermann had a very adventurous life. Barely aged 22 he joined the Spanish Navy, from which he resigned in 1928 after 4 years of service. However, civil life was not for him, so in 1931 he entered the Legion. On 28 September 1936 at the Battle of Peraleda de la Mata he stood his ground, so they promoted him to the rank of lance-corporal; then in August 1938 he became a sergeant of the IVth Battalion. At the time of the Civil War Pál Seszták from Nyíregyháza served in the Legion as well. He had been unable to find work as a tailor at home, so he emigrated to Spain. Since he couldn't find a workplace, in 1934 he tried his fortune in the Legion, where he attained the rank of sergeant, then in the Spanish Civil War he fought on the side of Franco against the republicans. In his unit he served with another Hungarian, János Szmolár form Békéscsaba, who also received non-commissioned officer rank.[20] Gyula Gunda was a flight first lieutenant, who, after graduating from the Ludovika Military Academy, became an officer in the Royal Hungarian Army; he served first at

[19] "Diario Oficial, del Ministerio del Ejercito" 1946, Ano LVII. Num. 34, Sábado, 9 de febrero, de, Tomo I.Pág.529 — http://www.bibliotecavirtualdefensa.es/BVMDefensa/i18n/catalogo_imagenes/imagen.cmd?path=26500&posicion=1 (accessed: 5.08.2017).

[20] "Nyírvidék — Szabolcsi Hírlap", 4 August 1936, p. 3 — https://library.hungaricana.hu/hu/view/Nyirvidek_1936_08/?pg=18&layout=s&query=Spanyol%20Idegenl%C3%A9gi%C3%B3 (accessed: 6.08.2017).

the Sopron Garrison, and later at the Szombathely Aviation Branch, then at the outbreak of the Spanish Civil War he asked to be discharged, and served on the side of Franco against the republican forces. In the war he won a lot of air victories, although he was injured a few times. For example, in an air battle above Madrid he had to execute a forced landing during which he broke his arm; again in 1938, near the heavy fighting at Tereuel, his warplane was shot down, and he only survived the crash with serious injuries.[21]

Interestingly, between the two World Wars many articles were published not just about the French Foreign Legion, but also about the Spanish Legion, and because of that a lot of people regarded the Legion as an opportunity — or a last opportunity. For example, three students tried to escape from Budapest and join the Legion. However, their tour ended at Székesfehérvár, from where the local police took them home.[22]

After the Second World War, many Hungarians fled to Spain,[23] where the Spanish Foreign Legion welcomed them as it did allied Germans soldiers. Most of them tried to change their names, so we don't know anything about most of them, though there were those who served in the Legion under their own names. Among the latter was the Debrecen-born Ádám Horváth, who was in the Legion for more than a year. According to his account published in the "Új Dunántúl" periodical in 1946, some Arrow Cross officers had recruited Hungarians to the Spanish Legion at Munich. It mentions by name one of the members of the recruiting "Legionist Commission", Arrow Cross Captain László Fehérváry. The volunteer-legionnaire Horváth was transported with his 30 companions through France to Spain, then to Morocco. According to his account in the Moroccan camp he already met several Hungarians, and he was put in a separate Hungarian unit, which was led by Alfred Erichson, a German staff-officer. A few of the Hungarians went to fight in Greece against the communists. Horváth met with men from Budapest, Transylvania and the Great Hungarian Plain, and according to his account, some other men had recently arrived from the displaced persons camp of Weidmannsdorf, which was located near to Klagenfurt. Malaria broke out amongst them, but their number didn't decrease, since reinforcements flew in week after week. There was also a Hungarian language newspaper printed at the training facility, which reported on the Hungarian situation. According to an article from 1947, the Emigré Hungarians' Republican League took over recruitment into the Legion.[24]

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[21] *Magyar repülőtiszt hősi halála a spanyol fronton*. "Kis Újság", 9 February 1938, Wednesday Issue, p. 5, and: *Magyar pilótatisztet lőttek le a spanyol vörösök*. "Makói Újság", 10 February 1938, p. 3.

[22] "Budapesti Hírlap", 21 Februray 1939, Tuesday Issue, p. 8.

[23] Á. Anderle: *A magyar-spanyol kapcsolatok ezer éve*, in: *Iberoamericana Quinqueecclesiensis 3*, Pécsi Tudományegyetem Ibero-Amerika Központ, Pécs 2005, p. 21 — http://www.idi.btk.pte.hu/dokumentumok/ibero2005.pdf (accessed: 12.08.2017).

[24] "Új Dunántúl", 238, No IV, 10 October 1947, Sunday Issue, p. 2.

Attila Darvas Tóth joined the organization in 1974, and served in Spanish Sahara.[25] The Hungarian legionnaire arrived from Veszprém and after he joined the Legion, he found himself in the Western Saharan areas, where he was involved in a fight not only with the militants of the Polisario but with the Moroccan soldiers infiltrating the area as well. According to his narrative, between 1958 and 1986 more foreigners served in the Legion, which was partly because the French Foreign Legion rejected previously convicted or wanted persons, so these often went to the Spanish, who welcomed every volunteer to their desert wars (Ifni, Western Sahara) where they were experiencing considerable casualties. However, after the death of Franco (1975) the number of foreign recruits started to decline, and then in 1986 — after the Spanish Ministry of Defense reduced the effective force and reshaped the organization — fell to zero.

Attila Darvas Tóth signed up during the most chaotic time of the Legion, when the legionnaires fought lesser and greater battles every day with the guerillas of the Polisario. The platoon to which he was dispatched as a recruit didn't have a non-commissioned officer in command, since their sergeant had lost his life in a battle at the Mauritanian frontier in December 1974, and the Legion couldn't find a replacement for several months. During Tóth's tour of duty he met with a legionnaire from Kecskemét who worked on a ship, and deserted to Canada with a Hungarian non-commissioned officer from Pest. He knew about another legionnaire, who was a physician, and who after serving his time went to Rhodesia. Besides these stories Tóth heard about other Hungarian legionnaires, but hadn't met them. According to him the Spanish gave the ranks of non-commissioned officers readily to the Eastern Europeans, but they couldn't receive an officer's comminssion.

After his training he got to Ceuta, where he was continuously on guard duty, and from where they took him every three months for four weeks on road patrol to the Western Saharan desert. By that time, he had learned that the Spanish didn't like or respect the Legion, but regarded it as a useful tool for tasks where great losses could be expected. He thought that the most difficult time was those seven months after Franco died (20 November 1975), and the Spanish decided that they would give Western Sahara to Morocco and Mauritania. Although the Spanish population and the members of the public administration had left the area by the end of 1975, the soldiers of the Legion stayed another two months. They didn't have any station, or dispatched any patrol, which wasn't attacked, a lot of times by those Sahrawis who had served previously in the nomad units (Tropas Nomadas) created by the Spanish, and who had changed sides to the Polisario. The Hungarian legionnaire lived to see that the Legion's leaving the Sahara became unnecessary for the Spanish government, how the previously powerful unit lost morale, how its members commited criminal offenses, and af-

[25] "AGMAV", C.46789, Cp. 30.

ter that how the soldiers of the Legion were forced to leave the organization. He himself was discharged in 1984.[26] It seems appropriate that Hungarians served in the Legion even after him, though they could have left the corps possibly after the removal of the foreigners — for example Attila Szászvári, who signed up in 1977.

The legionnaires discussed up to this point joined the Legion voluntarily. However, there was a course, which continued for years, in which Spain and the Fraternal Community of Hungarian Fighters gathered migrant soldiers, gendarmes (former Horthyst officers), and sent them in outmost secrecy for a one year "group training" to the Spanish Legion, so that they could refresh their faded military knowledge, and could learn new fighting techniques. Before this paper discusses the details of this program, I would like to introduce the Fraternal Community of Hungarian Fighters.

Fraternal Community of Hungarian Fighters

The Soldiers' Fraternal Community, built up as a military organization and consisting mainly of soldiers, was founded in the Summer of 1948 by major-general Ferenc Adonyi-Naredy in Klagenfurt, and it was later renamed to Fraternal Community of Hungarian Fighters (MHBK). However, the official founding of the MHBK took place only on 1 January 1949.[27] The organization was headquartered until 1955 in Austria, in the town of Absam, and then moved to Munich. The first leader of the organization was major-general András Zákó, who filled this post until his death in 1968. The largest groups of the organization operated in Austria and Germany, but eventually in all of the Western European countries; in fact, after the beginning of their emigration they formed units in North and South America, too. Thus, at the beginning of the 1950s the MHBK was present in 23 countries with 31 groups consisting of tens of thousands of members.[28] The organization consisted of divisions and subdivisions. Its membership consisted mostly of Horthy's officers or non-commissioned officers who had emigrated after the Second World War; only some of them came from other law enforcement

[26] *Volt egyszer egy Spanyol Idegenlégió I*, "Nagypolitika.hu" — https://nagypolitika.hu/2016/02/22/volt-egyszer-egy-spanyol-idegenlegio-i/ — (accessed: 6.08.2017), and: *Volt egyszer egy Spanyol Idegenlégió II*, "Nagypolitika.hu" — https://nagypolitika.hu/2016/08/11/volt-egyszer-egy-spanyol-idegenlegio-ii/ (accessed: 6.08.2017).

[27] G. Borbándi: *A magyar emigráció életrajza 1945—1985*. Bern 1985, p. 26—27.

[28] M. Baráth: *Támogatni vagy bomlasztani? Adalékok a magyar hivatalos szervek emigrációs politikájának változásához*, "Betekintő", 2011, no 3 — http://www.betekinto.hu/sites/default/files/2011_3_barath.pdf (accessed: 20.08.2017).

organizations (gendarmerie, police, etc.), and civilians didn't join at all. For this reason, the MHBK considered itself an exclusively military organization.[29] The Americans thought they were useful against the Soviet and Hungarian Secret Services, and according to some intelligence reports, several officers belonged to the membership, who were formerly active members of the Arrow Cross Party, so the Americans tried continuously to monitor the organization.[30]

The organization officially helped the soldiers living in emigration, however — mostly in the first years — they continued intelligence activity against the communist Hungarian government. They coordinated the gathered information for the American, French and other Western European governments. However, many of the members of the organization worked on their own, and sold their information to other secret services. After a time, they sold irrelevant gossip, for example that collected from refugees, or data created by themselves — several times false facts as well — to the Western intelligence agencies. For this reason the latter handled the data collected by the MHBK with suspicion, and because of its insufficiency (or just falsity) they looked for other sources of information. Because of the aforesaid the CIA had already begun to regard the MHBK as an unreliable organization in 1951,[31] and in fact after it confirmed the organization's unreliability from several sources, they shared this information with other intelligence agencies.[32] The MHBK's members gathered a lot of information too; they had been united by the Kopjás (literally "pikemen") movement modelled on the Nazi Werewolves in the time of the Arrow Cross Party. The creation of the pikemen was in 1942, but it was only realized in 1944 by General András Zákó and Captain-General Miklós Korponay. The aim of the movement was mainly to commit sabotage actions against the Soviet forces entering the country and they attempted to slow the Russian advance. The movement continued its activities after the war, and in 1949 it merged completely into the Fraternal Community of Hungarian Fighters. Zákó declared to the Westerners that the Kopjás-movement was an effectively functioning resistance organization. But the facts proved other-

[29] G. Borbándi: *A magyar emigráció…*, p. 26.

[30] *Collegial Society of Hungarian Veterans, aka. Comradeship of the Hungarian Warriors*, 11/3/50, CIA — https://www.cia.gov/library/readingroom/docs/MAGYAR,%20HARCOSOK,%20BAJTARSI,%20KOZOSSEGE%20%20%20VOL.%201_0003.pdf — (accessed: 20.08.2017.), as well as: *BRIEF about the Comradeship of Hungarian Veterans*, DCE 1858, 17 April 1951, CIA — https://www.cia.gov/library/readingroom/docs/MAGYAR%2C%20HARCOSOK%2C%20BAJTARSI%2C%20KOZOSSEGE%20%20%20VOL.%201_0014.pdf (accessed: 20.08.2017).

[31] WASH 01854, 28 July 1951, CIA — https://archive.org/details/ZAKOANDREAS-0020 (accessed: 20.08.2017), see also: WASH 01864, 29 July 1951, CIA — https://archive.org/details/ZAKOANDREAS-0021 (accessed: 20.08.2017).

[32] In greater details about this: *Central Intelligence Agency: Paper Mills and Fabrication*, February 1952 — https://www.cia.gov/library/readingroom/docs/PAPER%20MILLS%20AND%20FABRICATION_0001.pdf (accessed: 20.08.2017).

wise. The ÁVH caught 558 pikemen, but they sentenced 286 persons, which questions the real efficiency of the organization. Nevertheless, it was capable at least of retaining the agents of the Hungarian and Soviet intelligence, thus the Americans and their affiliate organizations could operate more effectively.[33] The MHBK created with its activities such problems for the military officers of the former political system, that the leaders of the Party removed most of them from the army,[34] which weakened it a lot, since the field officers and officers were replaced by on the one hand politically reliable, but on the other hand militarily untrained comrades. The organization published monthly its own newspaper titled "Hadak Útján" (literally "On the Path of the Wars"),[35] and several publications, which relate the fate of the Hungarian soldiers in Soviet captivity (White Book),[36] or the Hungarian deportations (Black Book), and also published other uncomfortable themes for the Hungarian communist government.[37] After the events of 1956, the organization became more and more marginalized. At the time it had already lost the support of the American and French secret services, and later — because of the softening of the Cold War, the different internal conflicts and the death of András Zákó — losing its military nature it started to "civilize": it ended its intelligence activities and became only one of several emigrational organizations.[38]

The MHBK and the Spanish Legion

One of the publicly declared goals of the MHBK was that in the frame of a Third World War they could expel the communist regime which had forced

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[33] K. Ungváry: *Az MHBK szürke eminenciása: Zákó András és az ellene folytatott állambiztonsági eljárások*, in: S. Gebei, ifj. I. Berténi, M.J. Rainer: *„…nem leleplezni, hanem megismerni és megérteni". Tanulmányok a 60 éves Romsics Ignác tiszteletére*. Eger 2011, p. 483—498 — http://tortenelem.uni-eger.hu/public/uploads/romsics60_5542287542c20.pdf (accessed: 20.08.2017); I. Zsitnyányi: *Egy „titkos háború" természete — A Magyar Harcosok Bajtársi Közössége tagjaival szemben lefolytatott internálási és büntetőeljárási gyakorlat 1948—1950*. "Hadtörténelmi Közlemények" 2002, 115, no 4 — http://epa.oszk.hu/00000/00018/00022/pdf/hk4.pdf (accessed: 20.08.2017).

[34] J. Pihurik: *A „horthysta katonatiszt" mint potenciális kém a Rákosi-korszakban*. "Betekintő", 2004, nr 3 — http://www.betekinto.hu/en/2014_4_pihurik (accessed: 20.08.2017).

[35] G. Borbándi: *A magyar emigráció…*, p. 28, 38, 113.

[36] The whole book can be reached at the library of the CIA at the next link — https://www.cia.gov/library/readingroom/docs/MAGYAR%2C%20HARCOSOK%2C%20BAJTARSI%2C%20KOZOSSEGE%20%20%20VOL.%201_0014.pdf (accessed: 20.08.2017).

[37] G. Borbándi: *A magyar emigráció…*, p. 110—113.

[38] K. Ungváry: *Az MHBK szürke eminenciása…*, p. 483—498; G. Borbándi: *A magyar emigráció…*, p. 264.

them into emigration, and "reconquer" the country. However, the Western allies had their reasons why they didn't want to arm those previously fighting against them. Instead the leaders of Spain — which became isolated after the Second World War — were seriously occupied with the thought of a war against the Soviet Union and the Eastern Bloc. They thought that from the Hungarian, Czech, Slovakian, Ukrainian, Romanian, Croatian and other nationality refugees with the cooperation of the Spanish Legion they would create international brigades, which would take part in the fight against the communists and the liberation of their countries.

The MHBK had — at the time of its founding — already made good connections with the Spanish authorities thanks to former Colonel-General Jenő Szántay, who was the leader of the MHBK's Spanish organization from 1950.[39] According to certain information, Major-General Zákó had held negotiations already in that year with the Spanish military and secret service leaders, so that Hungarian military officials could receive additional training, and possibly permanent employment in the units of the Spanish Army.[40] According to one of the reports of the CIA, some of the Hungarian military officers may have already joined the Spanish Legion by 1950.[41]

The former officers serving in the army of Horthy could receive a one-year "guest-officer exchange-service" opportunity in the Legion. The assignment of the officers was organized by Szántay, but neither of the commanding officers could maintain contact with the embassy, so they wouldn't attract the attention of the Hungarian intelligence. The MHBK also tried to prevent contact between officers from different units; such contact was allowed only among those serving in the same unit. Though usually they signed up for a one-year term of service, there was always opportunity for prolongation. Attention was paid in particular to the officers so they could get to the unit appropriate for their qualifications and branch of service, thus they could refresh and get their knowledge up to date. It seems that not only the soldiers living in Spain could serve in the Spanish units, but the members of the military emigration living in other countries as well. The officers received during their duty a payment equal to that of the Spanish officers, to which payment in kind (accommodation, food) was also added by the Spanish government, but lots of them found it insufficient.

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[39] *The Hungarian Emigration in 1950,* June 1, 1950. CIA — https://www.cia.gov/library/readingroom/docs/ZAKO%2C%20ANDREAS_0160.pdf (accessed: 20.08.2017).

[40] The fact of the negotiations was strengthened by the CIA too, which had Zákó — as a nazi war-criminal — under surveillance — https://archive.org/details/ZAKOANDREAS-0153 (accessed: 22.08.2017), see also: 1 June 1950, CIA — https://www.cia.gov/library/readingroom/docs/ZAKO%2C%20ANDREAS_0156.pdf (accessed: 22.08.2017).

[41] *Operation Venus*, Ref: OBBA-5355, 11 May 1956, CIA — https://www.cia.gov/library/readingroom/docs/KOZMA%2C%20FERENC%20%20%20VOL.%202_0030.pdf (accessed: 22.08.2017).

By 1955 the Spanish had already taken into consideration, that the international corps could be formed, but despite this they continued the "guest-officer program", and in fact they promised to establish a "symbolic" Hungarian unit. We are aware that in 1956 there was an artillery-lieutenant named Gábor Bethlen in Ceuta, as well as a sapper-lieutenant named Makray and an artillery-lieutenant named Bényei (or Bénei) in Barcelona.[42]

In the wake of the Hungarian Revolution of 1956, the Spanish leadership proposed a military intervention in Hungary under the supervision of the UN, but because of the disagreement of the superpowers and the Suez Crisis it couldn't be realized.[43] Despite this the Spanish continued to uphold their previous friendly relationship with the Hungarian military emigration, and — although in outmost secrecy — they welcomed Hungarian officers further into the units of the Legion. On 23 March 1957 the Hungarian ambassador at that time wrote about one of the volunteers in the following way: "As a guest of the Spanish Army former Royal Flying Lieutenant Kálmán Szeödemeteri Dömötör occupies his previous Hungarian Royal Military rank in a one-year service of combat officer-duty in the second regiment (Dar-Riffien, Morocco) of the Spanish Legion.[44]" After this, Lieut. Dömötör joined the organization of the MHBK, and in 1957 he spent a year in the Legion, but he was also active politically. For example — after the events of 1956 — he wrote a letter to Béla Király, who had been living as a refugee in the USA, asking that the revolutionary commission working in America not publish statements condemning the Spanish. Király answered to this letter and asked the lieutenant to prepare for him a report which would give an account of the situation of the Hungarian refugees arriving in Spain. This report was later sent to him by the lieutenant.[45]

The ÁVH had already received information that the MHBK was conducting training activities in Spain, for it ordered its agents to gather as much informa-

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[42] Ibidem.

[43] Á. Anderle: *1956 és a spanyol…*, p. 55—62.

[44] *Marosi Ferenc levele, 1957. március 23*, s. 8—195; Á. Anderle: *Marosy-iratok…*, s. 140—141.

[45] Kálmán Dömötör didn't stay with the Spanish after the expiration of his service; he was reassigned to the French Foreign Legion. He fought in Vietnam, and after having received French citizenship, he stayed in France where he became the secretary-general of the MHBK, and also president of the Fraternal Community of the Hungarian Legionnaires until 1990, when he passed away. *Interjú Sujánszky Jenővel, a párizsi magyarok október 23-i „diadalívi" megemlékezéseinek szervezőjével* — http://www.nagyimretarsasag.hu/images/kiadvanyok/oroksegunk_2013.pdf (accessed: 22.08.2017), see also: B. Nóvé: *"PATRIA NOSTRA" '56-os menekült kamaszok a Francia Idegenlégióban*. Eszterházy Károly Főiskola, Történelemtudományi Doktori Iskola, Eger 2016, p. 98 — http://disszertacio.unieszterhazy.hu/17/1/N%C3%B3v%C3%A9_B%C3%A9la_disszert%C3%A1ci%C3%B3.pdf (accessed: 22.08.2017).

tion as possible regarding the issue.[46] They protested several times to the Spanish that they were taking part in activities to overthrow the Hungarian government, and that they were giving weapons training to the Hungarian emigrants, in fact in order to enlist them in the Spanish Army. Nevertheless, the Spanish officially denied that they would have recruited emigrant Hungarians or other nationality emigrants for military units, or that they would plan to merge these into the Spanish Army.[47] It is true that the plan to create various Hungarian corps occurred in 1955, but it was never realized. In the ÁVH's opinion, by that time 500—600 officers and non-commissioned officers had already been trained in Spain.[48] One of the officers of the ÁVH, Gábor Füredi, dispatched his subordinate officer to Spain with the cover story that he was being sent by his factory, with machinery-improving intentions, and his primary objective was to gather as much information as possible from Marosi and Szántay about the Spanish training facilities, in which not only Hungarians but also other nationals were trained by the Spanish.[49] The agent didn't find out anything about these camps, since Marosi was not initiated into the military programs and the one responsible for them — Szántay — was dying. The only information gathered was from Marosi's secretary, Aurél Czilchert, who served in the Legion for one year, which was not enough information for the ÁVH.[50]

In spite of this, the Spanish didn't reject the idea of creating an international army consisting of refugees from the communist countries, which they would have then used against the Soviets. The plan, which can be found under the title of „*Lo que debe hacerse en este momento*"[51] in the Foreign Policy Archives of Madrid, was probably prepared by general Zákó at the request of the Spanish. The plan suggested the establishment of a Central and Eastern European

[46] *Operation Venus*, OBBA-4701, 27 January 1956, CIA — https://www.cia.gov/library/readingroom/docs/KOZMA%2C%20FERENC%20%20%20VOL.%202_0024.pdf, see also: *Operation Venus*, OBBA 3554, 8 June 1956, CIA — https://www.cia.gov/library/readingroom/docs/KOZMA%2C%20FERENC%20%20%20VOL.%202_0032.pdf (accessed: 22.08.2017).

[47] *Operation Venus*, OBBA-3554, 8 June 1956, CIA — https://www.cia.gov/library/readingroom/docs/KOZMA%2C%20FERENC%20%20%20VOL.%202_0032.pdf (accessed: 22.08.2017).

[48] This statement was treated with suspicion by the agent with whom his ÁVH supervising officer (Gábor Füredi) shared this. It is possible that the secret service tried to gather more support from the communist leadership and ensure their position by the enlargement of the information received from them — https://www.cia.gov/library/readingroom/docs/KOZMA%2C%20FERENC%20%20%20VOL.%202_0001.pdf (accessed: 22.08.2017).

[49] *Operation Venus*, OBBA-4701, 27 January 1956, CIA — https://www.cia.gov/library/readingroom/docs/KOZMA%2C%20FERENC%20%20%20VOL.%202_0024.pdf (accessed: 22.08.2017).

[50] *Operation Venus*, Ref: OBBA-5355, 11 May 1956, CIA — https://www.cia.gov/library/readingroom/docs/KOZMA%2C%20FERENC%20%20%20VOL.%202_0030.pdf (accessed: 22.08.2017).

[51] "What we have to do at this moment."

military command, which with either a Polish-Baltic or a Southeastern center would have consisted of 5000 Hungarian, Slovakian, Czech, Sudeten German, Romanian, Croatian and Bulgarian units each. According to the plan they would have started the liberation fight with the outbreak of a Czech revolt. The units would have been formed with Spanish support, but also with American material assistance, and the creator of the plan hoped for such material help from the Americans. The scheme — calculating with three years to prepare everything — acknowledged the possibility of a restrained nuclear war. It was written by hand on the assumption that it was supported by the Spanish government, with the condition that the Americans approve of it as well, but only with the leadership of Zákó. Yet another secret item suggested the stricter control and selection of the Hungarian refugees arriving in Spain, and the establishment of a secret financial fund — handled by the government — for operations against the communist countries.[52] However, by 1957 the Spanish political and military leadership didn't regard these efforts as relevant, and thus the guest-officer programs were terminated from 1958 on.

Conclusion

At the end of this article it is worthwhile to summarize the facts about the Hungarians and the Spanish Legion. At the beginning, the account focussed on the participation of the Hungarians in the Spanish Saharan and Western Saharan conflicts. It can be concluded that the Hungarians regularly took part in the events of the North-African Saharan wars, for example the Rif Wars. There were several Hungarian officers who fought in those battles. Between the two World Wars and mostly after the Second World War the Hungarians were again present in the area, since the Hungarian military and its soldiers were welcomed by the Spanish and in the Spanish Legion, which was one of the main supports of the Francoist military. The Hungarians who entered the Legion took part also in the Spanish Civil War, where they used their experience to help the nationalists. After the Second World War and the formation of the Eastern Bloc, many former Hungarian soldiers became inconvenient for the new communist regime, and as they were persecuted, many of them emigrated or fled the country hoping to find support against the communist regime. Franco himself had an idea — which he elaborated with one of the Hungarian veterans — to establish an army of Central and Eastern European emigrants, but it was never realized, because of the unfavorable political situation. However, a lot of Hungarian sol-

[52] Á. Anderle: *1956 és a spanyol…*, p. 60—61.

diers received hard training in the Spanish Legion, and they were organized in the MHBK. They not only fought in North Africa, but also were recruited by Western and Hungarian secret services, which wanted to use them to gather information about the ongoing activities of the Hungarian emigration. The Hungarian communist secret service (ÁVH), and also the British, American, Belgian and French intelligence services used them to receive data about the former officers' operational work. The very complicated situation ended in 1958, when — because they didn't believe that liberation of the Eastern European countries could be achieved — the Spanish relinquished the idea of the common army and the Hungarian officers' "guest-training" ended.

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MAGYAR,%20HARCOSOK,%20BAJTARSI,%20KOZOSSEGE%20%20%20VOL.%201_0003.pdf — (accessed: 20.08.2017).

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János Besenyő had more than 31 years of experience in the Hungarian Armed Forces. In his last assignment as colonel he led the General Staff, Scientific Research Centre more than 4 years. He is an assistant professor of University of Obudai and teaching African history, European security and defence, and conflict man-

agement. He is a lecturer in National Public Service University, Budapest (Doctoral School of Military Sciences), Eötvös Loránd University, Budapest (Doctoral School of History) and Eszterházy Károly University of Applied Sciences, Eger (Doctoral School of History) about African History, African conflicts, Hungarian participation in African peace operations, Western Sahara, terrorism, migration, Christian-Muslim relations, Hungarian-African relations.

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Dilemmas of Poland's foreign and security policies in the post-Cold War period in the context of its geopolitical location between Russia and Germany

Dylematy polityki zagranicznej i bezpieczeństwa Polski w okresie pozimnowojennym w kontekście jej geopolitycznego usytuowania między Rosją a Niemcami

Mieczysław Stolarczyk*

Abstract

The research objective of this paper is the presentation of the influence (significance) of the geopolitical factor in Poland's relations with the Russian Federation (Russia) and the Federal Republic of Germany (Germany) in the post-Cold War period, first and foremost the influence on the shares of convergent and divergent (contradictory) interests of Poland and the two countries, as well as relevant dilemmas concerning Poland's foreign and security policies. The main research thesis is that the geopolitical factor remains one

Abstrakt

Celem badawczym w artykule jest ukazanie wpływu (znaczenia) czynnika geopolitycznego w stosunkach Polski z Federacją Rosyjską (Rosją) i Republiką Federalną Niemiec (Niemcami) w okresie pozimnowojennym, w tym przede wszystkim na stopień zbieżnych i rozbieżnych (sprzecznych) interesów z tymi państwami oraz na dylematy z tym związane dla polityki zagranicznej i bezpieczeństwa Polski. Główna teza badawcza zawiera się w stwierdzeniu, że czynnik geopolityczny, mimo zmian zachodzących w ostatnich dziesię-

* Institute of Political Science, Faculty of Social Sciences, University of Silesia in Katowice; (e-mail: mieczyslaw.stolarczyk@us.edu.pl); https://orcid.org/0000-0002-9771-0062.

of the chief determinants of Poland's relations with Russia and Germany despite the changes taking place in the international system (e.g. the acceleration of globalisation processes) in the last few decades. In the post-Cold War period, however, it affected Poland's relations with Russia in a much more negative way than it did the Polish-German relations. The German problem in its traditional sense of a hazard source diminished considerably in the Polish foreign policy in the abovementioned period, while the significance of the Russian problem increased. The decision makers of the Polish foreign policy viewed Germany first and foremost as a partner and an ally (within NATO), while Russia was seen as the main hazard to Polish security, including a military hazard in the form of a direct invasion.

Wishing to present more detailed matters, the paper brings to the fore i.a. the issues concerning the essence of the geopolitical factor in the foreign policies of countries, certain conditions of Poland's geopolitical location in the post-Cold War period, the main stages of Poland's relations with Germany and Russia in that period together with their characteristics, the main areas of divergent interests in Poland's relations with Germany and Russia in the second decade of the 21st century, the similarities and differences in Poland's policy toward Germany and Russia in the post-Cold War period as well as the main dilemmas of the Polish foreign policy toward the end of the second decade of the 21st century stemming from Poland's geopolitical location between Russia and Germany.

One main conclusion formulated on the basis on those deliberations is that Poland's geopolitical location between Russia and Germany does not doom Polish relations with the two countries to a confrontational nature for historical reasons. The geopolitical factor is not an independent prime mover; it does not entail geopolitical determinism which automatically eliminates the possibility of influencing Poland's geopolitical situation by subsequent Polish gov-

cioleciach w systemie międzynarodowym (np. przyspieszenie procesów globalizacji), jest nadal jedną z głównych determinant stosunków Polski z Rosją i Niemcami. Jednakże w okresie pozimnowojennym rzutował on zdecydowanie bardziej negatywnie na stosunki Polski z Rosją niż na relacje Polski z Niemcami. W omawianym okresie w polityce zagranicznej Polski znacznie zmalało znaczenie problemu niemieckiego, w jego tradycyjnym rozumieniu źródeł zagrożenia, rosło natomiast znaczenie problemu rosyjskiego. Niemcy były postrzegane przez decydentów polskiej polityki zagranicznej przede wszystkim jako partner i sojusznik (w ramach NATO), natomiast Rosja, jako główne zagrożenie dla bezpieczeństwa Polski, w tym także jako zagrożenie militarne (zagrożenie bezpośrednią napaścią zbrojną).

Mając na uwadze zagadnienia bardziej szczegółowe, w opracowaniu wyeksponowane zostały m.in. kwestie dotyczące istoty czynnika geopolitycznego w polityce zagranicznej państw, niektóre uwarunkowania geopolitycznego usytuowania Polski w okresie pozimnowojennym, główne etapy i ich cechy charakterystyczne w stosunkach Polski z Niemcami i Rosją w tym czasie, główne obszary rozbieżnych interesów w stosunkach Polski z Niemcami i Rosja w drugiej dekadzie XXI w., podobieństwa i różnice w polityce Polski wobec Niemiec i Rosji w okresie pozimnowojennym oraz główne dylematy polityki zagranicznej Polski pod koniec drugiej dekady XXI w. wynikające z geopolitycznego usytuowania Polski między Rosją a Niemcami.

Jeden z głównych wniosków sformułowanych na podstawie przeprowadzonych rozważań zawiera się w stwierdzeniu, że geopolityczne położenie Polski między Rosją i Niemcami nie oznacza, że mając na uwadze związane z tym zaszłości historyczne, stosunki Polski z tymi państwami skazane są na konfrontacyjny charakter. Czynnik geopolityczny nie ma bowiem charakteru samodzielnej siły sprawczej, determinizmu geopolitycznego, automatycz-

ernments. The geopolitical location does not determine eternal enemies or eternal friends because one can derive various conceptions, programmes and objectives of the foreign policy from the same geopolitical location of Poland.

Key words: geopolitics, Poland's foreign policy, Polish-German relations, Polish-Russian relations

nie eliminującego możliwości wpływu kolejnych polskich rządów na zmianę geopolitycznej sytuacji Polski. Geopolityczne usytuowanie nie determinuje ani wiecznych wrogów ani wiecznych przyjaciół. Z tego samego położenia geopolitycznego Polski można bowiem wyprowadzić różne koncepcje, programy i cele polityki zagranicznej.

Słowa kluczowe: geopolityka, polityka zagraniczna Polski, stosunki polsko-niemieckie, stosunki polsko-rosyjskie

Introduction

When Poland regained independence in 1918, its foreign and internal policies in the subsequent periods and system forms (the Second Polish Republic, the postwar Polish republic, the Polish People's Republic and the contemporary Republic of Poland) were greatly determined by its geopolitical location between the two biggest neighbours, Germany and Russia, including by the subsequent system forms of those countries. The German system forms were: The Weimar Republic, the German Reich, the Federal Republic of Germany and the German Democratic Republic as well as reunified Germany (FRG) since 1990. The Russian system forms included: Soviet Russia, the Union of Soviet Socialist Republics (the USSR) and the Russian Federation (RF). The most important dilemma of Poland's foreign and security policies in the 20th century as well as in the first and second decade of the 21st century stems from its geopolitical location between Germany and Russia and has been included in the search for an answer to the following question: What objectives should be formulated in Poland's foreign and security policies toward those countries and what means and methods should be used to accomplish them in order to strengthen Poland's security as well as policy effectiveness in the bi- and multilateral relations with those countries? What is the convergence and divergence of interests between Poland and Germany as well as Poland and Russia in the aspects which are crucial to Poland's security? Those issues have been discussed i.a. in relevant publications penned by politicians, journalists and researchers of the Polish foreign policy. The most important works on this topic published in the first decades of the 20th century include those by Roman Dmowski and Adolf Bocheński.[1]

[1] R. Dmowski: *Niemcy, Rosja i kwestia polska.* Warszawa 1908; A. Bocheński: *Między Niemcami a Rosją.* Warszawa 1937. See more about the 19th- and 20th-century Polish geopolitical thought in: L. Sykulski: *Geopolityka. Skrypt dla początkujących.* Częstochowa 2014,

One must stress that the policy toward Russia and Germany as well as the relations with both countries only partially depended on Poland's actions. They were conditioned by intra-German and intra-Russian factors, the policies of those countries toward Poland, the German-Russian relations and the evolution of the global and European international system. The Polish-German relations and, even more, the Polish-Russian relations in the post-Cold war period were greatly influenced by the American factor, in particular since 1999, when Poland became a NATO Member State. The reason was that the United States played a leading role in Poland's external security policy.[2] Consequently, the objectives of the USA's policy toward Russia and Germany as well as the nature of the American-German and American-Russian relations in the subsequent phases of the post-Cold war period significantly influenced Poland's policy toward Germany and Russia. It must simultaneously be highlighted that Poland's aspirations to become a NATO Member State and strengthen the bilateral relations with the USA concerning security, including i.a. the striving of Polish politicians for the elements of the American Ballistic Missile Defence (e.g. Fort Trump) to be distributed in the territory of Poland, were motivated by the sense of a hazard posed by Russia and a conviction that the United States were the only reliable guarantor of Poland's security.

Two main traditional geographic directions of the Polish foreign policy are: the Western direction and the Eastern direction. Either of them was prioritised in Poland's subsequent historical periods and social and political system forms. Referring to the two great historical ideas present in the thinking of the Polish intellectual and political elite on Poland's position in Europe, the Piast paradigm and the Jagiellonian paradigm, one can state that the entire post-Cold War period was dominated by the Piast paradigm, i.e. the priority of the Western direction in the Polish foreign policy in order to accomplish the interests stemming from Poland's reason of state as defined by the subsequent groups ruling the country after 1989.[3] To Poland, its relations with the Federal Republic of Germany were the most important bilateral relations among those with European countries. After 1990, Germany was not only Poland's most important economic partner among European and non-European countries, but also its most important partner among European countries concerning politics[4] and interso-

p. 95 and subs. pages; R. Juchnowski: *Miejsce geopolityki w polskiej myśli politycznej XIX i XX wieku.* Toruń 2018.

[2] J. Zając: *Poland's Security Policy: The West, Russia, and the Changing International Order.* London 2016, p. 189 and subs. pages.

[3] See M. Mróz: *Między Polską piastowską a jagiellońską. Kontrowersje wokół kierunków polskiej polityki zagranicznej po akcesji do Unii Europejskiej.* "Dyplomacja i Bezpieczeństwo" 2013, nr 1.

[4] One deviation from this tendency took place when Beata Szydło was the Prime Minister as representatives of her government exposed the leading role of Great Britain in this scope for a certain time.

cial relations. However, when security (first and foremost military security) was concerned, the subsequent Polish governments ascribed the greatest importance to Poland's bilateral relations with the United States of America, especially after Poland became a NATO Member State in 1999.

The second strategic direction of the Polish foreign policy after 1989 was the Eastern (Jagiellonian) direction, which did not exclude opinions that it was actually the most important (priority) direction, with the Ukrainian vector as the crucial one. The advocates of that thinking argued that all the other directions of the Polish foreign policy (e.g. the alliance with the USA and other countries within NATO, Poland's membership in the European Union) were aimed only at building instruments to accomplish the objectives of the priority Eastern direction.[5] The core of Poland's Eastern policy in the last decade of the 20th century as well as the first and second decade of the 21st century was formed by the closely connected relations with the Russian Federation (Russia) and Ukraine.

The research objective of this study is the presentation of the influence (significance) of the geopolitical factor on Poland's relations with Russia and Germany in the post-Cold War period, first and foremost the influence on the shares of convergent and divergent (contradictory) interests of Poland and the two countries, as well as relevant dilemmas concerning Poland's foreign and security policies toward the end of the second decade of the 21st century. The main research thesis is that the geopolitical factor remains one of the chief determinants of Poland's relations with Russia and Germany despite the changes taking place in the international system (e.g. the acceleration of globalisation processes) in the last few decades. In the post-Cold War period, however, it affected Poland's relations with Russia in a much more negative way than it did the Polish-German relations. The German problem in its traditional sense of a hazard source diminished considerably in the Polish foreign policy in the abovementioned period[6], while the significance of the Russian problem increased. The decision makers of the Polish foreign policy viewed Germany first and foremost as a partner and an ally (within NATO), while Russia was seen as the main hazard to Polish security, including a military hazard in the form of a direct invasion.[7] Though it was not highlighted in the country's official documents till 2014, the Polish elite from the Solidarność [Solidarity] movement did deem Russia the main hazard to Poland and its chief adversary already at the beginning of the 1990s. The sense

[5] P. Żurawski vel Grajewski: *Geopolityka — siła — wola. Rzeczypospolitej zmagania z losem.* Kraków 2010, p. 293—331.

[6] See M. Stolarczyk: *Zbieżność i różnice interesów w stosunkach polsko-niemieckich w latach 1989—2009.* Katowice 2010.

[7] See more in A. Walicki: *O Rosji inaczej.* Warszawa 2019; *Polityka wschodnia Polski — między fatalizmem geopolitycznym a klątwą niemocy.* Red. S. Bieleń. Pułtusk—Warszawa 2019; M. Stolarczyk: *Rosja w polityce zagranicznej Polski w latach 1992—2015.* Katowice 2016.

of a hazard posed by Germany diminished in the Polish society in the subsequent decades of the post-Cold War period, while the fear of Russia increased. That process reached its climax in 2014. The sense of a hazard posed by Russia determined Poland's foreign policy in bi- and multilateral relations, especially the policy toward the post-Soviet area, the relations with the USA, the policy in NATO and, to a large extent, the policy toward Germany and within the EU. The significance of the geopolitical factor in Poland's relations with Russia and Germany has increased in recent years due to i.a. Crimea incorporation by Russia and the conflict in eastern Ukraine as well as the growth of Germany's and Russia's superpower positions in international relations.

The essence of geopolitics (the geopolitical factor) in the foreign policies of countries

Foreign policy, including a country's security policy implemented in the external sphere, depends on numerous conditions (determinants) — both internal (intrastate) and external ones, the latter coming from the international environment. In general, foreign policy is a function of a set of internal (intrastate) and international conditions present in the immediate and further international environment. Each of these groups is additionally divided into objective and subjective conditions.[8] Still, not all the determinants of a country's foreign policy can be precisely classified as members of either group. This concerns first and foremost the geopolitical factor, which is a specific function of a country's internal and external geographical environment (objective conditions) as well as the conceptions of that country's foreign policy formulated in this context and their practical implementation (internal subjective conditions).

The reflection on the influence exerted by geographical conditions on the political activity of individuals and social groups, including foreign policies of countries, has a long history which dates back to ancient Greece, but the term "geopolitics" itself appeared only toward the end of the 19th century.[9] The leading representatives of classical geopolitics, e.g. Swede Rudolf Kjellen, Englishman Halford Mackinder and Germans Friedrich Ratzel and Karl Haushofer, highlighted geographical determinism to explain and justify the foreign policies of countries, including their competition and expansive actions as well as

[8] See more in R. Zięba: *Uwarunkowania polityki zagranicznej.* W: *Wstęp do polityki zagranicznej państwa.* Red. R. Zięba. Toruń 2004.

[9] It was first used in 1899 by Swedish lawyer Rudolf Kjellen.

conducting politics in terms of *Realpolitik*.[10] The German geopolitical doctrine, the main representative of which was Karl Haushofer, put forward a thesis that the development trends and political expansion of countries were geographically determined.[11]

Though classical geopolitics was discredited during World War II and the geopolitical factor significance in the shaping of the security policies of countries has slightly diminished in recent decades, i.a. due to the application of new military technologies (technology has defeated geography) and the intensification of the interdependence and globalisation processes (opinions that geoeconomics has defeated geopolitics),[12] the geographical location of countries and other geographical factors (first and foremost natural resources as well as the lie of the land, the climate and the shape of borders) still play a very important role in the security policies of countries. The broadly defined geopolitical factor, including geopolitical notions, greatly influences the perception of international reality both by the decision makers of a country's foreign policy and the individual members of a particular society.

There is no universally accepted definition of geopolitics in geopolitical literature. The broadest approach defines geopolitics as geographical conditioning and explaining of political processes as well as searching for connections between the geographical space and political phenomena and processes, in particular investigating the influence of geographical factors on the foreign policies of countries.[13] A slightly narrower definition of geopolitics states that it constitutes research on the foreign policies of countries and international relations from the geographical perspective.[14] According to Leszek Moczulski, geopolitics deals with the changing balance of forces in an unchanging space.[15] Geopolitics is characterised by a conviction that certain timeless truths or laws derived from the observation of the balance of forces are right.[16] Stanisław Bieleń and Andrzej Skrzypek write that the essence of Polish geopolitics is constant reflection on

[10] See L. Sykulski: *Geopolityka*…, p. 61 and subs. pages.

[11] See more in A. Wolff-Powęska: *Doktryna geopolityki w Niemczech*. Poznań 1979, p. 131 and subs. pages.

[12] The geoeconomic approach to international relations research assumes that the main hazards to a country's security are the economic ones. Unlike classical geopolitics, this approach puts forward a thesis that geographical location is not the most important aspect. The superior factor is the economic potential, which determines the rank and power in a given space, and every economic power strives to translate its power into political influence. See *Geoekonomia.* Red. E. Haliżak. Warszawa 2012.

[13] See more in C. Jean: *Geopolityka.* Przeł. T. Orłowski. Wrocław 2003; C. Flint: *Wstęp do geopolityki.* Przeł. J. Halbersztat. Warszawa 2008; J. Potulski: *Wprowadzenie do geopolityki.* Gdańsk 2010; L. Sykulski: *Geopolityka*…, p. 16—17.

[14] Ibidem.

[15] L. Moczulski: *Geopolityka. Potęga w czasie i przestrzeni.* Warszawa 1999, p. 75.

[16] S. Bieleń: *Czas próby w stosunkach międzynarodowych.* Warszawa 2017, p. 44.

Poland's position in the changing balance of forces in the international arena, mainly with Russia's participation to the East and Germany's to the West.[17]

I reckon that the contemporary essence of the geopolitical factor as a very important determinant of the foreign policies of countries is the conceptions and objectives derived from a given country's geographical location for its internal and international actions. Various politicians, analysts and political parties can use the same geographical location to derive entirely different conceptions regarding the perception of the national interest as well as the proposed and implemented security policy. The geopolitical location does not determine eternal friends or eternal enemies, as exemplified by the policy of reconciliation between France and the FRG in the subsequent decades after World War II. The location of a country is a very important determinant of its internal and foreign policies, but one must remember that the policy implemented in the context of that country's geopolitical location depends on the subsequent groups ruling that country and the media that support them. One society can demonstrate various assessments of a country's geopolitical location — and it usually does. This is exemplified by the Poles' diversified assessments of Poland's geopolitical location, mainly its situation between Germany and Russia. Some viewed it as "Poland's curse" — a hopeless situation not to be overcome. Adam Balcer and Kazimierz Wóycicki write: "The concept of 'Polish geopolitics' in our tradition meant the virtually hopeless location of Poland between two enemy superpowers: Germany (previously Prussia and Austria) and Russia. For many decades, Polish geopolitics was a synonym of that insurmountable hopelessness."[18] To others, Poland's geopolitical location in the post-Cold War period was the country's chance to develop and play the role of an important subject between the East and the West,[19] a "keystone" or a "sagacious agent" between the two parts of Europe.[20] However, that chance has not been taken by the decision makers of Polish politics. Those diversified assessments were expressed in geopolitical conceptions as well as geopolitical codes, generated and spread among the public by politicians, experts and journalists.[21] A geopolitical code is defined as the way a given country positions itself in relation to the world. That code consists of i.a. the following assumptions: a) Who are our present and potential

[17] *Wstęp.* W: *Geopolityka w stosunkach polsko-rosyjskich.* Red. S. Bieleń, A. Skrzypek. Warszawa 2012, p. 8.

[18] A. Balcer, K. Wóycicki: *Polska na globalnej szachownicy.* Warszawa 2014, p. 77.

[19] See M. Dobroczyński: *Między mocarstwami.* Warszawa—Toruń 1996.

[20] S. Bieleń: *Pozycja geopolityczna Polski*. W: *Polska w stosunkach międzynarodowych.* Red. S. Bieleń. Warszawa 2007, p. 28; P. Eberhard: *Polska i jej granice.* Lublin 2004, p. 278; P. Grudziński: *Państwo inteligentne. Polska w poszukiwaniu międzynarodowej roli.* Toruń 2008, p. 10; K. Łastawski: *Dylematy współczesnej polskiej racji stanu.* W: *Polityka zagraniczna Polski w zmieniającym się ładzie międzynarodowym. Wybrane problemy.* Red. R. Zięba, T. Pawłuszko. Toruń 2016, p. 47.

[21] C. Flint: *Wstęp do geopolityki*…, p. 72 and subs. pages.

allies? b) Who are our present and potential enemies? c) How can we oppose our potential enemies? d) How shall we justify these assumptions to our own public opinion and others?[22] The geopolitical code forms one base for the international activity of a country's political decision makers and is utilised to interpret the phenomena and processes taking place in the international environment, first and foremost in the neighbouring countries. The shaping of geopolitical ideas, conceptions, doctrines and programmes is conditioned not only by objective factors (e.g. a country's geographical location, resources or economic potential), but also — and to a greater extent — by subjective ones (e.g. the historical experience and the related perception of hazards).

The concept "strategic culture" has a broader scope, determined by history and geopolitics, than "geopolitical code". Stephen F. Szabo reckons that a nation's strategic culture is an aspect of its general political culture (a result of mutual impacts of history, geography, politics, economy and culture) which concerns the national security policy, including convictions pertaining to national interests, the world, the nature of the international system as well as the causes and effects of the instruments used by the country in its foreign policy.[23] The perception of the international environment and the social attitudes toward other countries and nations depend first and foremost on the historical experience (historical memory),[24] the implemented historical policy and the political and strategic culture as well as the society's education level, hierarchy of values, religious beliefs and dominant ideology.

Certain conditions of Poland's geopolitical location in the post-Cold War period

In the years 1989—1993, Poland found itself in an entirely new geopolitical situation. The number of its neighbours increased from three in 1989 (the USSR, Czechoslovakia and the GDR) to seven at the beginning of 1993 (the

[22] Ibidem; L. Sykulski: *Geopolityka*…, p. 48—51.

[23] S.F. Szabo: *Na rozstajach dróg. Kryzys w stosunkach niemiecko-amerykańskich.* Przeł. K. Korkosz. Warszawa 2006, p. 87.

[24] Agata Włodkowska-Bagan justifiably argues that historical memory very often means the way a given incident was remembered by the majority of a given community, not the true course of events. Historical memory may also be a selective record of past events, thus turning into historical oblivion. A. Włodkowska-Bagan: *Kultura strategiczna Polski.* W: *Polityka zagraniczna Polski*…, p. 57. One must highlight that a characteristic feature of historical policies implemented by groups ruling the individual countries is the selective approach to historical events and their excessively one-sided interpretation.

FRG, the Russian Federation *via* the Kaliningrad Oblast, Lithuania, Belarus, Ukraine, Slovakia and the Czech Republic). Poland had borders acknowledged by all its neighbours, which was expressed in the treaties it signed with them in the years 1990—1994. This way, Poland found itself in an entirely new geopolitical situation in a very short time. The new situation was viewed both by its ruling groups and the majority of its society as much more beneficial than the previous situation in the bipolar system the European part of which was the Yalta-Potsdam system.[25]

The first government formed by the Solidarność [Solidarity] movement with Tadeusz Mazowiecki as the Prime Minister redefined Poland's reason of state both in its internal aspect (market economy and parliamentary democracy) and its external aspect (independence — security — development). The essence of the new Polish reason of state implemented *via* the foreign policy was the regained independence in the relations with the Soviet Union and its consolidation after USSR dissolution, building the country's security, supporting the nation's and the society's economic and civilisational development as well as strengthening Poland's position in the international arena, especially in Europe.[26] One direct consequence was the new objectives accomplished in the Polish foreign policy, including the priority of the Western direction and the effort to change alliances and connect Poland institutionally with Western Europe (a permanent connection with the West) as well as a new Eastern policy, including striving to arrange new, partnership-based relations with the Soviet Union and then with its main formal successor, the Russian Federation, after USSR dissolution at the end of 1991.

One of the consequences of the great systemic and geopolitical transformation in Poland's immediate international environment after 1989 was the great weakening of Russia's influence in Central Europe and the gradual strengthening of Germany's role in that subregion. The influence of the United States in that part of Europe, predominantly in the political and security areas, also kept increasing, first and foremost due to the launching of the NATO enlargement process. The zone of influence of the Russian Federation as the main successor of the USSR in the international law aspect was pushed away from the Elbe River and behind the Bug River. For the first time in modern history, Germany and Russia became separated not only by the territory of Poland, but also by the countries which emerged beyond Poland's eastern border due to USSR dissolution: Ukraine, Belarus, Lithuania, Latvia and Estonia. Though Poland bordered

[25] See K. Łastawski: *Pozycja geopolityczna Polski w Europie po rozpadzie bloku radzieckiego.* W: *Bezpieczeństwo międzynarodowe. Polska — Europa — Świat. Księga Jubileuszowa dedykowana Profesorowi Ryszardowi Ziębie z okazji czterdziestolecia pracy naukowej.* Red. J. Zając, A. Włodkowska-Bagan, M. Kaczmarski. Warszawa 2015.

[26] See more in: R. Kuźniar: *Droga do wolności. Polityka zagraniczna III Rzeczypospolitej.* Warszawa 2008.

on Russia in the east only *via* the Kaliningrad Oblast, Russia and Ukraine were its most important eastern neighbours.

The Western direction in the Polish foreign policy after 1989 was supposed to be implemented first and foremost *via* close cooperation and permanent agreement with Germany, which was reunified in 1990 and constituted the strongest country in the economic and political structures of Western Europe as well as the most important ally of the United States in continental Europe (the notion "through Germany to Europe"). A strategic objective in the Western direction of the Polish foreign policy, consistently pursued in subsequent years, was membership in the European Union and the NATO. Poland eventually managed to obtain the NATO membership first, in 1999, and it became an EU Member State in 2004. When Poland entered the North Atlantic Alliance, the role of the United States in the Polish foreign policy significantly increased, predominantly in the political and security areas. Poland's security policy underwent Americanisation.[27] Due to the USA's leading role in the Polish security policy, Poland's security and the Polish-Russian relations became a function of the American-Russian relations to a considerable extent. The Polish-German relations were determined by the German-American relations to a much smaller extent.

The Ukrainian crisis and conflict in 2014 and subsequent years significantly worsened Poland's geopolitical situation. The sense of external security considerably diminished in most Poles, while the sense of a hazard posed by Russia greatly increased. 2014 was an incredibly important turning point in the Polish security policy. The National Security Strategy of the Republic of Poland signed by the President of Poland on 5 November 2014 included provisions from which it appeared that, in view of the crisis and then conflict in eastern Ukraine, including Crimea incorporation by Russia and the latter's support for the pro-Russian separatists in eastern Ukraine, Russia was the main military hazard to Poland's security.[28]

One of the most characteristic features of Poland's relations with Russia and Germany in the post-Cold War period was the asymmetry of the countries, which was unfavourable to Poland. Although Poland's economic development has significantly accelerated, which includes its GDP growth in the last 30 years, Poland was a middle-sized country in the post—Cold War system, while Germany and Russia were superpowers. The power of a country is built both from material components (the physical power — i.a. the economic, military and demographic potential, the surface area, the degree of dependence on foreign resources)[29] and

[27] See R. Zięba: *Polityka zagraniczna Polski w strefie euroatlantyckiej.* Warszawa 2013, p. 118 and subs. pages.

[28] *The National Security Strategy of the Republic of Poland.* Warszawa 2014 — www.mon.gov.pl (accessed: 29.11.2014).

[29] H. Morgenthau: *Polityka między narodami. Walka o potęgę i pokój.* Przeł. R. Włoch. Warszawa 2010; P. Buhler: *O potędze w XXI wieku.* Przeł. G. Majcher. Warszawa 2014.

non-material elements (e.g. prestige, national morale, diplomacy quality, government quality).[30] Bearing in mind the material and non-material components of power, it seems very accurate to say that power in international relations is a country's ability to use its material and non-material resources in a manner influencing the behaviour of other countries according to the expectations of the decision makers implementing that country's foreign policy.[31] When one considers the material and non-material power of Poland, Germany and Russia, one sees that Germany's and Russia's capabilities of influencing the behaviour of other countries were much greater than Poland's capabilities in this regard.

For many decades, the main attribute of the superpower position held by the FRG has been its economic potential. Germany is Europe's greatest economic power and one of the greatest in the world. In 2017, the FRG took the fourth place in the world concerning GDP at current prices (3.677 trillion USD), after the United States (19.390 trillion USD), the People's Republic of China (12.237 trillion USD) and Japan (4.872 trillion USD).[32] The FRG occupied the first position among the world's leading exporters throughout the years (that position has belonged to the PRC for a few years). In 2017, the value of German export was 1.279 trillion EUR, while the import reached 1.34 trillion EUR. Germany's trade surplus in 2017 reached approx. 245 billion EUR.[33] Not only was Germany the greatest economic power in Europe, but it also became the most influential European country in politics. That process considerably intensified in the second decade of the 21st century.[34]

Though Russia's international position significantly weakened in the 1990s, it played the role of a Eurasian superpower in the entire post-Cold War period. That position was greatly strengthened in the first and second decade of the 21st century. Russia's geopolitical location and numerous other attributes let it play one of the leading roles both in Asia and Europe (42.4% of Europe's territory and over 28.4% of Asia's territory belong to Russia). Russia is the richest in natural resources among all the countries of the world. It is one of the biggest

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[30] Ibidem, p. 136 and subs. pages. Joseph S. Nye Jr writes about soft power as an incredibly important component of a country's overall power influencing the effectiveness of its foreign policy. J.S. Nye: *Soft Power. Jak osiągnąć sukces w polityce światowej.* Przeł. J. Zaborowski. Warszawa 2007.

[31] M. Sułek: *Dynamika zmian parametrów potęgi państw regionu Azji i Pacyfiku 1985—2015.* W: *Region Azji i Pacyfiku w latach 1985—2015. Ciągłość i zmiana w regionalnym systemie międzynarodowym.* Red. A. Jarczewska, J. Zajączkowski. Warszawa 2016, p. 577.

[32] "Rocznik Strategiczny" 2018/2019, T. 24, p. 444 and subs. pages.

[33] https://www.bankier.pl/wiadomosc/Niemiecki-eksport-srubuje-rekordy-7571395.html (accessed: 29.08.2018).

[34] See more in M. Stolarczyk: *Wzrost mocarstwowej pozycji Niemiec w drugiej dekadzie XXI wieku.* W: *Między ideą, pasją a działaniem. Księga jubileuszowa dedykowana dr. hab. Marianowi Mitrędze.* Red. P. Grzywna, J. Lustig, N. Stępień-Lampa, B. Zasępa. Katowice 2017.

exporters of natural gas and crude oil. In 2012, Russia's GDP exceeded 2 trillion USD.[35] Russian export in 2012 reached 529 billion USD and the import equalled 335 billion USD. At the beginning of the second decade of the 21st century, Russia took the eighth place in global export and the 16th place in global import.[36] In 2014, before the West imposed sanctions on Russia for Crimea incorporation and supporting the pro-Russian separatists in Donbass, Russia's nominal GDP according to IMF data was 1.860 trillion USD. Russia occupied the 10th place worldwide concerning nominal GDP (the value of goods and services produced in a country throughout the year). Poland was 23rd in the same ranking, with its nominal GDP reaching approx. 548 billion USD. Due to the sanctions imposed on Russia in 2014 and prolonged in subsequent years as well as very serious drops of crude oil and gas prices on the international stock exchange markets in the years 2015—2016, Russia's GDP decreased in that period by approx. 3%. In 2017, however, it increased by approx. 1.5%. According to some estimations, Russia's GDP at current prices in 2017 reached nearly 1.578 trillion USD.[37] In 2018, its GDP increased by 2.3% in relation to the 2017 value. Also in 2018, Russia's foreign trade turnover equalled 692.6 billion USD. Russian export in 2018 increased by 25.6% in comparison with 2017 and reached 452.1 billion USD, while the import increased by 5.1% and reached 240.5 billion USD.[38] It must at least be mentioned here that the Russian Federation is a permanent member of the UN Security Council and possesses the world's second biggest nuclear forces after the USA. Russia's military expenditure in 2017 slightly exceeded 66 billion USD (Germany spent approx. 44 billion USD and Poland spent a little more than 10 billion USD on that purpose).[39] The USA's military expenditure in the same year reached almost 610 billion USD.[40]

Due to the asymmetry of potential (power) and of the international roles between Poland, Germany and Russia, Poland's geopolitical location and the historical experience, Germany's and Russia's roles in Polish politics were definitely greater than Poland's role in German and Russian politics. This manifested itself both in the conceptions and programmes of the foreign policies of those countries and their political practice. Still, considering the role in the politics of Germany and Russia, Poland played a much greater role in Germany's politics

[35] "Rocznik Strategiczny" 2013/2014, T. 19, p. 398.

[36] *Polska 2013. Raport o stanie handlu zagranicznego.* Polish Ministry of Economy. Warszawa 2013, p. 13.

[37] "Rocznik Strategiczny" 2018/2019, T. 24, p. 452.

[38] R. Staśkiewicz, M. Walczak: *Ocena sytuacji w handlu zagranicznym z 2018 roku.* Division of Macroeconomic Analyses and Forecasts in the Department of Economic Analyses. Ministry of Entrepreneurship and Technology. DAG_Ocena_sytuacji_w_handlu_zagranicznym_2018.pdf-Adobe Acrobat Reader DC (accessed: 21.11.2019).

[39] "Rocznik Strategiczny" 2018/2019, T. 24, p. 456 and subs. pages.

[40] Ibidem, p. 464.

(including the programme assumptions made by FRG governments) than in Russia's politics. An example is the CDU/CSU-SPD coalition agreement signed in March 2018, which highlights several times the need for enhancing Germany's cooperation with Poland.[41]

Agata Włodkowska-Bagan indicates that Poland's history, including the colonial rule of the First [I RP] and Second [II RP] Polish Republic over Eastern Europe, which is still frequently called "the Eastern borderlands" [Kresy], as well as Poland's geopolitical location between two countries playing the roles of superpowers and USSR dissolution played the main role in the shaping of the Polish strategic culture in the post-Cold War period.[42] The same author lists the following features of the Polish strategic culture: the Russian and German syndrome and related suspiciousness (distrust) toward the two big neighbours,[43] including a feeling that they strengthen their cooperation over the Poles' heads (the Rapallo syndrome), as well as the syndrome of betrayal by allies in 1939 and the victim syndrome (e.g. blaming others for the country's failures).[44] The abovementioned features of the Polish strategic culture affected the perception of challenges and hazards by the decision makers of the Polish foreign policy in the post-Cold war period and their actions in this scope.

The features of a strategic culture, including the Polish one, are manifested in the conceptions of the foreign and security policies because foreign policy conceptions are among the most important subjective internal conditions governing a country's foreign policy. Foreign policy conceptions and the objectives formulated on their basis stem from the national and state interests; more precisely, they are derived from the way those interests are understood (interpreted) and carried out by the subsequent decision makers of a country's foreign policy. The two traditional geopolitical conceptions present in the Polish political thought since the beginning of the 20th century regarding Poland's foreign policy, the latter implemented first and foremost in between Russia and Germany, are: the incorporation (realistic) conception related to Roman Dmowski and the federation (Promethean) conception connected with Józef Piłsudski. The realistic conception assumed the restoration of the Republic of Poland covering first and foremost the ethnically Polish territory (i.e. one inhabited by ethnic Poles) as well as the lands where Poles were a minority but dominated in terms of culture and ethnically non-Polish lands necessary for communication-relat-

[41] *Ein neuer Aufbruch für Europa. Eine neue Dynamik für Deutschland. Ein neuer Zusammenhalt für CDU,CSU und SPD. Koalitonsvertrag zwischen CDU,CSU und SPD* — dynamic.faz.net/download/2018.koalitionsvertrag.pdf (accessed: 9.08.2018).

[42] A. Włodkowska-Bagan: *Kultura strategiczna Polski*…, p. 58 and subs. pages.

[43] One extreme manifestation of that was Jarosław Kaczyński's statement at the beginning of September 2010 that Poland under the rule of the PO/PSL coalition was "a Russian-German condominium".

[44] Ibidem, p. 60 and subs. pages.

ed, strategic and economic purposes. In R. Dmowski's conception, which he modified in the following years, Poland's security in the East was to be based on close relations with Russia, also at the cost of the independence aspirations and efforts of Belarusians and Ukrainians. He saw the main hazard to Poland in Germany, the civilisational advantage of Germans over Poles and a possible German expansion into the ethnically Polish lands (i.a. Greater Poland, Gdańsk with Pomerania and at least a part of Upper Silesia).[45] The federation conception deemed Russia the main enemy. It assumed support for the emergence of independent national states in the Russian Empire area (Prometheism): first of all, the Lithuanian and Ukrainian states, as well as, to a lesser extent, a Belarusian state. Then, those nations and their organisational structures were to be included in a system of alliances (an Eastern European union) or a federation (based on separate statehood or broad self-government autonomy) in which Poland would be the leader (a restoration of the pre-1772 Republic of Poland in a new version). Piłsudski wished to establish a federation of the nations which had belonged to the First Republic of Poland and wanted to break away from Russia.[46] The federation (Promethean) conception referred to the Jagiellonian paradigm, putting the emphasis on Poland's civilisational mission in the East.[47] In practice, Piłsudski's plans of creating a federation of four nations — Poles, Lithuanians, Belarusians and Ukrainians — based mainly on the pre-partition Republic of Poland with a possible expansion were not carried out. One of the main reasons was the fact that the nations supposed to become the federation members did not want such solutions and objected to them, striving to achieve their own independent statehoods. Lithuanians, Ukrainians and, to a lesser extent, Belarusians demonstrated mainly anti-Polish attitudes, manifested their national and political identity and strove to break away from Poland instead of cooperating with it more closely.[48] The best example of the lack of conditions for a practical

[45] See R. Dmowski: *Niemcy, Rosja i kwestia polska.* Wrocław 2000 (first ed. 1908); L. Moczulski: *Geopolityka…,* p. 557 and subs. pages.

[46] L. Moczulski: *Geopolityka…,* p. 560 and subs. pages.

[47] A. Czarnocki: *Koncepcje polityki zagranicznej Polski.* W: *Międzynarodowe stosunki polityczne.* Red. M. Pietraś. Lublin 2006, p. 617—618. Rafał Juchnowski justifiably argues that the founding idea for the Polish political thought throughout history was Jagiellonism combined with federalism and the superpower conception. The main components of the Jagiellonian paradigm were i.a.: Poland's key role in the region situated between the Baltic Sea, the Black Sea and the Adriatic Sea, the anti-Russian attitude, the sense of a civilisational mission and the bulwark conception. R. Juchnowski: *Miejsce geopolityki w polskiej myśli politycznej…*

[48] A. Marszałek: *Polskie dyskusje o integracji europejskiej po II wojnie światowej w historycznej perspektywie porównawczej. Wybrane zagadnienia.* Toruń 2010, p. 218 and subs. pages; Adolf Bocheński writes that the Jagiellonian paradigm, associated by Poles with freedom, tolerance and federalism for Ukrainians or Lithuanians, was actually a synonym of Polish imperialism as well as cultural and economic hegemony. After: R. Juchnowski: *Miejsce geopolityki w polskiej myśli politycznej…*, p. 263.

implementation of the federation conception was the Polish—Ukrainian war for Eastern Galicia (including Lviv) and the turn of 1918 and 1919, which defeated the independence aspirations of Galician Ukrainians and established the Polish rule over the land up to the Zbruch River. J. Piłsudski's Kiev expedition (preventive war) was not successful, mainly because Ukrainians did not grant those actions their mass support.

Another conception stemming from Poland's geopolitical location between Russia and Germany was Intermarium. It became a subject of foreign policy for virtually all the governments which ruled the Second Republic of Poland and conducted the policy of "two enemies."[49] Its essence was the striving to neutralise the Russian and German influence in Central and Southern Europe by establishing a political and economic association of countries reaching from the Baltic Sea to the Black Sea and the Aegean Sea, in which Poland would play a leading role. The conception was never carried out i.a. due to the tensions in the Polish-Lithuanian and Polish-Czechoslovakian relations.[50] The Intermarium conception was highly appreciated by many Polish politicians, analysts and journalists in the post—Cold War period. It was put forward predominantly by politicians connected with two political parties: Konfederacja Polski Niepodległej [the Confederation of Independent Poland][51] and Prawo i Sprawiedliwość [Law and Justice] (PiS). The latest version of that conception, modified to include the countries situated between the Baltic Sea, the Black Sea and the Adriatic Sea, has been promoted by President of Poland Andrzej Duda and subsequent PiS governments as Trimarium [Trójmorze] or the ABC conception since 2015. Although PiS politicians underline that Trimarium is not to be connected with Intermarium because it is not geopolitical in nature and its objectives are purely pragmatic (first and foremost the building of a North—South energy corridor), it is hard to accept this stance fully. Trimarium, presented as an infrastructure project and not a political one, was established in 2015 on the initiative of the Presidents of Poland and Croatia: Andrzej Duda and Kolinda Grabar-Kitarović. It gathers 12 countries: Austria, Bulgaria, Croatia, the Czech Republic, Estonia, Hungary, Latvia, Lithuania, Poland, Romania, Slovakia and Slovenia. Despite the declared infrastructural and non-geopolitical nature of Trimarium, it is easy to conclude that the main motives of that project, carried out predominantly on the initiative of Polish authorities, include the effort to diminish Germany's role in the EU and neutralise certain implications of the German-Russian coopera-

[49] See A. Skrzypek: *Geopolityka "Międzymorza" i jej wpływ na stosunki Polski z Rosją.* W: *Geopolityka w stosunkach polsko-rosyjskich.* Red. S. Bieleń, A. Skrzypek. Warszawa 2012.

[50] A. Marszałek: *Europejska idea integracji międzynarodowej w perspektywie historycznej.* Toruń 2008, p. 180 and subs. pages.

[51] When Leszek Moczulski promoted Trimarium, he indicated 18 countries which could participate in that conception. L. Moczulski: *Geopolityka*…, p. 543—544.

tion on the increase of Russian gas supplies to Germany and other countries, i.a. by the plans of the Trimarium Member States to purchase more gas imported from the USA.[52]

Poland's Eastern policy after 1989 and even more after USSR dissolution referred to the Promethean conception in its significantly modified version which was created after World War II by Jerzy Giedroyc and Juliusz Mieroszewski — editors of "Kultura" [Culture], a monthly published by the Polish immigrant community in Paris. The core of that conception, contained in the acronym ULB (Ukraine, Lithuania, Belarus), was an assumption that those countries were Poland's natural allies. The editors of "Kultura" were in favour of developing the best possible relations between Poland and Russia, but not at the cost of the neighbours, especially Ukraine. Independent Ukraine was perceived as the main barrier preventing the restoration of the Russian Empire.[53] It should be mentioned here that even though subsequent Polish governments after 1989 referred to the ULB conception, they did not support all of its elements equally. This concerned in particular the postulate formulated by J. Giedroyc which he highlighted after 1989: the need to normalise the Polish-Russian relations and make them as good as possible as well as strive for "Russia's Europeanisation."[54] One characteristic feature of the Polish Eastern policy in the post-Cold War period was the diversified understanding and interpretation of the ULB conception.

The Promethean vision, Intermarium and the ULB conception all influenced Poland's foreign policy in the post-Cold War period, albeit with varying intensity depending on the exact time.[55] Their mutual element was the search for the geopolitical possibilities of shaping the regional international system in Poland's

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[52] The first Trimarium summit took place in Dubrovnik (25—26 August 2016). The final declaration adopted there indicated the main objectives of cooperation in such areas as gas power supply, transport, digital competition and economy. See M. Sienkiewicz: *Koncepcja Trójmorza w polityce zagranicznej Polski po 2015 r.* "Dyplomacja i Bezpieczeństwo" 2016, nr 1; A. Balcer: *Trójmorze — myślenie życzeniowe czy Realpolitik?* "Dialog" 2017, nr 1. The second Trimarium summit was held in Warsaw (6—7 July 2017) with the participation of President of the United States Donald Trump, the third one was organised in Bucharest (17—18 September 2018) and the fourth one took place in Ljubljana (5—6 June 2019).

[53] I. Hofman: *Polska—Niemcy—Europa. Program zachodni paryskiej "Kultury".* Lublin 2009, p. 32 and subs. pages.

[54] J. Giedroyc was afraid that the fight with Sovietism, Sovietisation and communism might transform into a fight with Russia. He remarked that Poland was doomed to cooperation with Russia regardless of that country's form, so the relations needed to be normalised without showing unnecessary humility or arrogance, which was unfortunately Poland's constant trait. *Teczki Giedroycia.* Oprac. I. Hofman, L. Unger. Lublin 2010, p. 75, 88—89.

[55] Rafał Juchnowski writes, "The Piast—Jagiellonian paradigm, the bulwark conception and the 'missionary' nature of Poland's role in relation to its eastern neighbours became the foundation for Polish geopolitics again after the fall of communism. Of course, their form was much subtler than in the previous periods". R. Juchnowski: *Miejsce geopolityki w polskiej myśli politycznej…*, p. 478—479.

subregion in opposition to Russia and, although to a much lesser degree, in opposition to Germany.

Main stages of Poland's relations with Germany in the post-Cold War period and their characteristics

Poland's relations with Germany in the post-Cold War period can be divided into several phases (stages). Each of them was specific i.a. due to the scope of convergent and divergent interests as well as the defined objectives accomplished in the Polish-German bilateral relations and in the bi- and multilateral relations of either country with other participants of international relations. In a somewhat simplifying manner, one can divide Poland's relations with the FRG in the years 1990—2019 into the following phases:

1. The years 1990—1991, when new political and legal foundations were adopted. The main ones were two signed treaties: the German-Polish Border Treaty (14 November 1990), which confirmed the border between the two countries, and the Polish-German Treaty of Good Neighbourhood and Friendly Cooperation (17 June 1991)[56];
2. The years 1991—1998, characterised by development of bilateral cooperation in nearly all fields. The disputable issues emerging in that period did not constitute a serious burden to the Polish-German interstate relations, which was manifested particularly by Poland *via* the "Polish-German community of interests" formula[57];
3. The years 1998—2004, when the Polish-German relations were significantly determined by Poland's accession negotiations with the European Union. At that time, beside cooperation in many fields, significant differences in the stances of both governments and societies came to the fore. They concerned some areas of the EU accession treaty negotiated by Poland (e.g. free movement of labour or trade in land), with certain historical aspects in the background (a dispute concerning the Centre Against Expulsions construction plans put forward by the management of the Federation of Expellees and compensation claims of the Prussian Trust against Poland), as well as important international issues (e.g. resolving the Iraqi problem, subsequent modifications of the functioning of EU integration structures as well as perception

[56] See the text of both treaties in *Polska—Niemcy: dobre sąsiedztwo i przyjazna współpraca.* Red. J. Barcz, M. Tomala. Warszawa 1992, p. 19—20 and 24—34.

[57] See more in M. Stolarczyk: *Wokół formuły "polsko-niemiecka wspólnota interesów".* "Przegląd Zachodni" 1998, nr 1.

of Russia's role in international relations and the nature of the policy toward that country)[58];

4. The years 2005—2007, when the Polish-German relations worsened considerably, first and foremost due to another intensification of disputes over historical issues as well as new elements in Poland's historical policy during the rule of the government formed by Prawo i Sprawiedliwość and its coalition partners. The "German problem" recurred in the Polish foreign policy, mainly because of the reappearance of historical issues and burdens in the political discourse of both countries. In Poland, however, representatives of the ruling groups became much more involved in the discussion than did their counterparts in Germany. The historical policy of PiS significantly determined the Polish-German relations. Analysts supporting the PiS rule simultaneously argued that Germany's role in Polish politics after 1989 was greatly overestimated, while Poland's role in German politics was underestimated.[59] It was i.a. for those reasons that the Piast (Western) direction in the Polish foreign policy weakened at that time, while the Jagiellonian (Eastern) direction strengthened.[60] According to the foreign policy conception put forward by those advocating the implementation of a political project called the Fourth Republic of Poland [IV RP], solving the problems appearing in the Polish bi- and multilateral relations, especially in the relations with Russia, Germany and the European Union, was seen mainly from the angle of a conflict of interest (so-called policy of dignity and rising from the knees)[61];
5. The years 2008—2015, characterised by another strong pro-German turn in the Polish foreign policy and an increase of Germany's role in Polish politics (so-called "bet on Germany"). This was caused mainly by the actions of the new government formed in November 2007 by the PO/PSL coalition with Donald Tusk as the Prime Minister and included i.a. the quietening of the disputes over historical issues (e.g. the construction of the Centre Against Expulsions carried out in Berlin since 2005 under a changed name of a "Visible Sign"),[62] diminishing the controversy around other disputable matters (e.g.

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[58] See more in M. Stolarczyk: *Zbieżność i różnice interesów w stosunkach polsko-niemieckich w latach 1989—2009.* Katowice 2010; Z. Mazur: *Centrum przeciwko Wypędzeniom (1999—2005).* Poznań 2006; *Erwachsene Nachbarschaft. Die feutsch-polnischen Beziehungen 1991 bis 2011.* Hrsg. D. Bingen, P.O. Loew, K. Ruchniewicz, M. Zybura. Wiesbaden 2011.

[59] M.A. Cichocki: *Niemiecka polityka wobec Polski na nowych drogach?* "Dialog" 2005/2006, nr 72—73, p. 32—33.

[60] M. Mróz: *Między Polską piastowską a jagiellońską…*

[61] See P. Grudziński: *Państwo inteligentne. Polska w poszukiwaniu międzynarodowej roli.* Toruń 2008, p. 120 and subs. pages.

[62] In 2013, the construction of the Documentation Centre for Twentieth-Century Expulsions was commenced in Berlin. The project was first carried out as the Centre Against Expulsions and then under the name of a Visible Sign.

the construction of Nord Stream I, a German-Russian gas pipeline running along the bottom of the Baltic Sea, with the participation of concerns from other Western European countries) and reducing the role of NATO in expeditions (Poland and Germany did not participate in NATO's military operation in Libya in 2011). The effort made by the governments of both countries resulted in a considerable improvement of the Polish—German intergovernmental relations. The relations between the governments led by Chancellor Angela Merkel and Prime Minister Donald Tusk benefited from a better atmosphere suitable for resolving disputable issues. When a new government was formed in the autumn of 2014 by the PO/PSL coalition with Ewa Kopacz as the Prime Minister, Poland's policy toward Germany did not change;

6. Since the end of 2015, when, as a result of the parliamentary election held on 25 October 2015, PiS formed a new government in the middle of November 2015 with Beata Szydło as the Prime Minister. As highlighted in the PiS programme, one of the main objectives to be pursued by the new government was "restoration and then strengthening and protection of Poland's autonomous position in international politics and internal security."[63] Striving to "restore Poland's autonomous position in the international arena", including in the relations with the EU and Germany,[64] the government led by Prime Minister B. Szydło diminished Germany's role in the Polish foreign policy, which manifested itself i.a. in Germany's distant position in the exposé delivered by Polish Minister of Foreign Affairs Witold Waszczykowski in the Polish parliament at the end of January 2016, in which Poland's relations with Great Britain were highlighted more than those with Germany. Still, Minister Waszczykowski announced that the friendly relations with Germany would be continued. He said that it was the right time for a positive reflection on the community of interest in Europe as well as a good opportunity for a little stocktaking of the affairs in the neighbourhood. He also stated, "The Polish-German contacts will be better if accompanied by sincerity and openness instead of the occasionally pretended and superficial conciliatory tone."[65] Even before becoming the Minister of Foreign Affairs in B. Szydło's government, Witold Waszczykowski said that the strategy of close cooperation with Germany pushed through by Radosław Sikorski for many years had ended in failure.[66] In practice, the Polish-German

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[63] *Program Prawa i Sprawiedliwości 2014* — www.pis.org.pl/dokumenty?page=1 (accessed: 12.10.2015).

[64] Ibidem.

[65] *Information on the Polish foreign policy tasks in 2016, presented by Polish Minister of Foreign Affairs Witold Waszczykowski in the Polish parliament on 29 January 2016* — http://msz.gov.pl/aktualnosci/wiadomosci/minister_witold_waszczykowski_o_priorytetach_polskiej_dyplomacji, p. 11 (accessed: 3.02.2016).

[66] *Nie jesteśmy eurosceptyczni. Rozmowa z Witoldem Waszczykowskim.* "Rzeczpospolita", 3 November 2015.

relations in the years 2016—2017 cooled considerably. German political scientist Kai-Olaf Lang wrote that they had entered a new phase. "The period of mutual understanding and closeness is behind us. Nowadays the tone of the debate is toughening and distrust is increasing — on both sides."[67] The same author also said that the policy of the PiS government toward Germany oscillated between distrust and cooperation[68]. The main disputable issues in the Polish-German relations at that time included i.a.: the construction of Nord Stream II, the second line of the German-Russian gas pipeline running along the bottom of the Baltic Sea; the way of resolving the refugee and migration crisis in the EU; breaking the fundamental democratic principles in Poland by the politicians of PiS and the cooperating parties; demanding reparations from Germany by PiS politicians; and the growth of Germany's superpower position.

A slight improvement in the Polish-German relations took place in the years 2018—2019. In December 2017, Mateusz Morawiecki became Poland's Prime Minister. In January 2018, after a cabinet reshuffle, Jacek Czaputowicz became the Minister of Foreign Affairs. In his exposé delivered in the Polish parliament on 21 March 2018, Minister J. Czaputowicz said i.a. that friendly relations with Germany were the precondition for the success of any positive projects put forward in the EU and that the Polish government wished to commence works on solving the issues on which the stances of the two countries differed[69]. A new tone of the relations with the FRG maintained by Mr Morawiecki's government included i.a. the decision not to emphasize reparations: that matter was to be considered by experts from both countries.

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[67] K.O. Lang: *Kłóćmy się, ale rozsądnie.* "Rzeczpospolita", 26 January 2016.

[68] K.O. Lang reckons that the PiS government has a strong sense of hazard and fear of new Germany which allegedly uses its dominant position in the EU to push Poland to the sidelines. PiS does not trust Germany and accuses it of an offensive policy of forcing through its own interests. At the same time, PiS acknowledges that there are many areas, especially in economy, where cooperation must be continued. *Ekspert: polityka Polski wobec Niemiec oscyluje między nieufnością a współpracą* — http://wiadomosci.wp.pl/kat,1356,title,Ekspert-polityka-Polski-wobec-Niemiec-oscyluje-miedzy-nieufnosia-a-wspołpraca,wid,18379882,wiadomosc.html?ticaid=11323 (accessed: 15.06.2016).

[69] *Minister Jacek Czaputowicz o priorytetach polskiej dyplomacji w 2018 roku* — http://www.msz.gov/pl/pl/aktualnosci/wiadomosci/minister_jacek_czaputowicz_o_priorytetach_polskie_dyplomacji_w_2018_roku, p. 11 (accessed: 25.04.2018).

Main areas of divergent interests in Poland's relations with Germany in the second decade of the 21st century

The outcome of the Polish-German cooperation after 1989 concerning politics, economy and intersocial relations between Poles and Germans is definitely positive. Studies, press articles and politicians' speeches in both countries in nearly the last 30 years have rightly highlighted first and foremost the positive achievements and effects. However, a characteristic feature of all the stages of the Polish-German relations after 1989 was the simultaneous presence of convergent and divergent interests as defined by the subsequent ruling groups in Poland and Germany.

In the author's opinion, the most important areas of divergent interests as understood by the decision makers in the Polish and German foreign policies in the second decade of the 21st century were as follows:

1. **The stances of Poland and Germany on the manners of solving the conflict in Ukraine.** A characteristic feature of all the stages of the Polish-German relations in the post-Cold War period was the presence of significant differences in the two countries' Eastern policies, first of all toward Russia and Ukraine.[70] During the Ukrainian conflict, the stances of the Polish and German governments on Russia became similar, but that convergence (which pertained predominantly to the causes of the Ukrainian crisis and conflict)[71] was still accompanied by considerable differences. The main differences between the Polish and German stances on the Ukrainian crisis and conflict concerned:
   — the degree of direct involvement of the Polish and German political circles in the Ukrainian revolution of 2014. No other country's politicians

[70] See M. Stolarczyk: *Polska i Niemcy wobec polityki wschodniej Unii Europejskiej i stosunków z Rosją w pierwszej dekadzie XXI wieku.* "Rocznik Integracji Europejskiej" 2010, nr 4; M. Stolarczyk: *Rosja w polityce Polski i Niemiec na przełomie pierwszej i drugiej dekady XXI wieku. Zakres zbieżności i różnicy stanowisk.* "Studia Politicae Universitatis Silesiensis" 2014, T. 12; K. Malinowski: *Polska i Niemcy w Europie (2004—2014). Różnice interesów — uwarunkowania i konsekwencje.* Poznań 2015, p. 161 and subs. pages.

[71] Representatives of both countries' governments held President of Ukraine Viktor Yanukovych and the Ukrainian government led by Prime Minister Mykola Azarov responsible for the Ukrainian crisis because they had decided to suspend the preparations for signing the Ukraine-European Union Association Agreement. They also blamed the Russian authorities and President Vladimir Putin because of their effort to slow down the fast pace at which Ukraine was approaching the EU. Moreover, the Polish and German governments absolutely condemned Crimea incorporation by Russia and the latter's support for the pro-Russian separatist groups in eastern Ukraine. They also supported political and economic sanctions on Russia. See more in M. Stolarczyk: *Polska i Niemcy wobec kryzysu i konfliktu ukraińskiego.* W: *Implikacje konfliktu ukraińskiego dla polityki zagranicznej i bezpieczeństwa Polski. Aspekty polityczne, wojskowe, gospodarcze oraz społeczne.* Red. K. Czornik, M. Lakomy, M. Stolarczyk. Katowice 2015.

became involved in supporting the Ukrainian revolution of 2014 on such a scale or in such a direct, intense and uncritical manner as did Polish politicians;

— the political isolation of Russia in the international arena. Representatives of subsequent Polish governments advocated imposing the most severe political and economic sanctions possible on Russia. Still, Russia relatively quickly ended its political isolation in the relations with Western countries which had begun in the middle of 2014, and Germany significantly contributed to that fact (the visits of Chancellor A. Merkel and Minister of Foreign Affairs Frank-Walter Steinmeier in Russia in 2015);

— the degree of involvement of the Polish and German governments in the de-escalation of the conflict in eastern Ukraine. German diplomacy became involved to the largest extent of all the EU Member States in the negotiations conducted under the OSCE patronage which concerned Minsk I and Minsk II — peace agreements eventually signed in Minsk. The German involvement in the Normandy Format, which aims at reaching a political solution to the conflict in eastern Ukraine, was perceived with great reserve by the representatives of Polish authorities, i.a. due to turning Poland away from the negotiations. Polish journalists put forward a thesis that the Minsk agreements were a success of Russia and the pro-Russian Ukrainian separatist groups as well as a failure of the post-Maidan Ukrainian authorities. The dominant attitude in Poland was intransigence toward Russia, so every compromise was viewed as a failure of the West and Russia's success. While German diplomacy consistently strove for the de-escalation of the conflict in eastern Ukraine, Poland undertook no such initiative. Throughout many years, Poland had aspired to the role of the main creator of the EU's Eastern policy, including the role of Ukraine's defender, but it lost that position to Germany in the years 2014—2015.

2. **The stances of Poland and Germany on Ukraine's EU membership.** In 2014, the new, post-Maidan Ukrainian authorities signed a Ukraine-European Union Association Agreement in two stages. Representatives of the Polish government saw that as an incredibly important stage on Ukraine's way to become an EU Member State. However, representatives of the German government accepted and supported Ukraine's European aspirations but did not mention its EU membership. Poland advocated defining a clear-cut deadline for Ukraine's membership by the EU itself, whereas German politicians avoided making such declarations.
3. **The stances of Poland and Germany on Ukraine's NATO membership.** The conflict in eastern Ukraine greatly distanced that country from NATO membership. A vast majority of the ruling groups in the NATO Member States demonstrated no political will to become entangled in an armed con-

flict with Russia by supporting Ukraine's aspirations to join NATO. While the stance advocating the need for the Finlandisation of Ukraine (so that the country would remain outside military organisations) was strengthening in the West,[72] the Presidents of Poland, Bronisław Komorowski and Andrzej Duda, as well as representatives of subsequent Polish governments declared their support for the effort made by the Ukrainian authorities to join NATO. At the same time, representatives of the FRG government were definitely against admitting Ukraine to NATO.[73]

4. **The stances of Poland and Germany on the sense of a military hazard posed by Russia and on strengthening the eastern flank of NATO.** Even though negative attitudes toward Russia significantly increased among Germans in the years 2014—2019, German politicians did not acknowledge the Russian hazard toward their country to the same extent as did Polish politicians. It was relatively frequently remarked in Poland that the German stance on the Russian hazard toward Poland and other countries of the Central and Eastern Europe was ambiguous to a certain degree. On the one hand, German politicians undertook actions allowing for the eastern flank of NATO to be strengthened (e.g. Germany's consent to take the command of a rotational battalion in Lithuania in which the Bundeswehr soldiers also participate). On the other hand, the German government did not agree to permanent presence of NATO forces in Poland or the Baltic states (which was sought by the Polish government) i.a. to ensure adherence to the NATO—Russia Founding Act of 27 May 1997, in which the NATO Member States had obliged not to distribute nuclear weapons or considerable armed forces in the new Member States. Unlike German authorities, Polish authorities believed that the Act was no longer in force because Russia had breached it by incorporating Crimea. A dozen days before the NATO Warsaw Summit (8—9 July 2016), German Minister of Foreign Affairs Frank-Walter Steinmeier criticised the NATO Anaconda-16 military exercise held in Poland. He warned that the policy toward Russia should not be limited to military deterrence and "sabre-rattling". Those ambiguities in the FRG security policy stemmed from the

[72] Even Zbigniew Brzeziński, an avowed supporter of including Ukraine in the European structures, proposed the Finnish model for Ukraine in 2014, according to which the country would maintain broad economic relations both with Russia and the EU but would not participate in military alliances. Henry Kissinger had a similar opinion on those matters. Z. Brzeziński: *Fiński model dla Ukrainy.* "Gazeta Wyborcza", 25 February 2014; *Interview with Henry Kissinger. Do We Achieve World Order Through Chaos or Insight?* — www.spiegel.de/international/world/interview-with-henry-kissinger-on-state-of-global-politics-a-1002073.html (accessed: 18.11.2014).

[73] *Steinmeier gegen Nato-Mitgliedchaft der Ukraine* — www.spiegel.de/politik/deutschland/ukraine-krise-steinmeier-gegen-nato-mitgliedchaft-der-ukraine-a-10004525.html (accessed: 24.11.2014).

Deterrence and Dialogue strategy adopted by A. Merkel's government, which assumed ally solidarity with all the NATO Member States and diminishing the tension in the NATO—Russia relations.[74]

5. **The stances of Poland and Germany on the prospects for their relations with Russia.** Poland froze its relations with Russia on the highest level in the years 2014—2019. During the crisis and conflict in eastern Ukraine, Poland's role as one of Russia's main antagonists in the EU and NATO was strengthened. The decision makers of the Polish foreign policy demonstrated an uncompromising attitude toward Russia, especially in the years 2014—2015. At the same time, Germany conducted a constant albeit difficult dialogue with Russia. Chancellor A. Merkel frequently criticised President V. Putin's policy toward Ukraine, but she still underlined that Russia was and would remain a part of Europe and the EU's biggest neighbour, so a situation where Russia became an enemy of the West instead of its partner was inadmissible. The FRG government still wished to act as a mediator and agent between the West and Russia.[75] The White Book presented in July 2016 contained not only the criticism of Russia's actions which breached the principles of independence and respect for borders, but also i.a. a statement that NATO's long-term objective concerning Russia was strategic partnership.[76] A survey conducted by the Friedrich Ebert Foundation at the beginning of 2019 showed that the Russian hazard was perceived by 77% of Poles and approx. 30% of Germans. However, 50% of the surveyed Germans saw the main hazard in the policy conducted by D. Trump.[77]
6. **The stances of Poland and Germany on the refugee and migration crisis in the EU.** The refugee and migration crisis, which reached its climax in 2015, was seen as the most serious hazard to EU existence and cohesion as well as the greatest challenge for its future. Poland and many other EU Member States strongly criticised the decision made by Chancellor A. Merkel on 24 August 2015 that Germany would consider asylum applications without observing the Dublin procedure in force in the EU at that time and was ready to admit all immigrants (the hospitality policy). Though Chancellor Merkel assured the EU that Germany would handle the inflow of so many refugees, it very quickly turned out that the country was not able to admit all of them

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[74] K. Szubart: *Stanowisko Niemiec na szczyt NATO w Warszawie. Dialog i odstraszanie.* "Biuletyn Instytutu Zachodniego" 2016, nr 248; Idem: *Szczyt NATO w Warszawie — konsekwencje dla Niemiec.* "Biuletyn Instytutu Zachodniego" 2016, nr 260.

[75] See M. Stolarczyk: *Polska i Niemcy wobec kryzysu i konfliktu ukraińskiego...*

[76] *Das Weissbuch zur Sicherheitspolitik und zur Zukunft der Bundeshwer.* Berlin 2016 — https://www.bmvg.de/portal/a/bmvg/!ut/p/c4/04_SB8K8xLLM9MSSzPy8xBz9CyrpHK9pNyydL3y1Mzi4QTS5A (accessed: 12.11.2016).

[77] *Sondaż FES. Niemcy widzą zagrożenie w USA, Polacy — w Rosji* — https://wiadomosci.wp.pl/sondaz-fes-niemcy-widza-zagrozenie-w-usa-polacy-w-rosji (accessed: 17.02.2019).

(approx. one million in 2015) in such a short time without truly serious problems. The criticism was even greater, also in Poland, when the FRG government undertook actions aiming at introducing an automatic distribution of immigrants in the EU Member States. In subsequent years, the tendency against immigrant admission strengthened in Poland and other EU Member States, including the FRG. That concerned first and foremost economic migrants due to various implications, including related hazards (e.g. economic, social, security-related and civilisational ones).[78]

7. **The difference of Poland's and Germany's interests in their energy and climate policy.** In recent years, many people have expressed an opinion that the biggest and long-standing problem in the Polish-German relations is the energy sphere, including the consequences of Germany's Energiewende (energy transition) to the EU's energy and climate policy.[79] The differences between the Polish and German stances concerning the energy and climate policy stemmed i.a. from the two countries' divergent strategies in this field. In the spring of 2011, after the breakdown of the Japanese nuclear power plant in Fukushima, the FRG government decided to take a turn in the energy policy. Consequently, nuclear power is planned to be eliminated till 2022 (which does not seem realistic), while renewable sources of energy are to supply 60% of energy by 2050. The strategy pursued by subsequent Polish governments was just the opposite: it assumed that the Polish energy industry would still be based on hard and brown coal, with an increasing share of nuclear energy in the future.[80] In principle, Poland and Germany implemented two different models of the national energy policy. Germany aimed at strengthening its energy security, so it cooperated more closely with Russia on the import of Russian energy resources. In the middle of the second decade of the 21st century, Russia was the biggest supplier of gas and crude oil to German economy: approx. 44% of its gas import and over 30% of the crude oil import came from Russia. It was anticipated that Russian supplies of gas and crude oil to Germany would increase in subsequent years. Consequently, the dependence of German economy on Russian energy carriers would grow as well. Nord Stream II project implementation will probably be the most evident manifestation of this. In general, instead of reducing the dependence of German economy on Russian gas and crude oil supplies, the FRG ruling groups believed that Germany's energy security would im-

[78] See M. Stolarczyk: *Stanowisko Polski wobec kryzysu migracyjno-uchodźczego Unii Europejskiej.* "Krakowskie Studia Międzynarodowe" 2017, nr 2 (XIV).

[79] *Polska—Niemcy. Partnerstwo dla Europy? Interesy, opinie elit, perspektywy.* Red. P. Buras. Warszawa 2013, p. 48 and subs. pages.

[80] B. Molo: *Polska wobec polityki energetyczno-klimatycznej UE w drugiej dekadzie XXI w.* "Krakowskie Studia Międzynarodowe" 2013, nr 4 (X); P. Buras: *Polska—Niemcy: Partnerstwo dla Europy? Interesy, opinie elit, perspektywy.* Warszawa 2013.

prove if the cooperation with Russia in this scope became closer. At the same time, the decision makers of the Polish foreign policy implemented a strategy aimed at a significant reduction of the dependence of Polish economy on the supplies of Russian crude oil and in particular Russian gas for security reasons and then at achieving complete independence in this scope. Each party expected greater solidarity from the other. Poland expected greater solidarity from Germany in the energy policy and reducing the dependence on Russian energy carriers as well as strengthening the eastern flank of NATO. Germany expected greater solidarity from Poland mainly in tackling the refugee and migration crisis. Striving to block the implementation of Nord Stream II, Polish diplomacy supported the American projects which postulated imposing sanctions on the companies building the second line of the gas pipeline running along the bottom of the Baltic Sea, and that irritated German politicians.

8. **The difference of stances concerning the scope of the influence exerted by the historical burden on the interstate and intersocial Polish-German relations.** The historical policies in Poland and Germany in the post-Cold War period demonstrated significant differences, the intensity of which varied throughout the years. The historical burden, including disputes over the interpretation of history (first and foremost in relation to World War II and the first years after its end), concerned i.a. the following issues:
   — too frequent highlighting by Germany of the consequences of World War II to Germans (e.g. displacements) and their country without taking into account the causes, the first of which was the invasion of Poland by the German Reich on 1 September 1939;
   — the process of passing from "the nation of perpetrators" and the feeling of guilt for the crimes of the German Reich to "the nation of victims". This process continues in Germany and aims to demonstrate the "lawlessness" and "harm" of the displacements imposed by the 1945 Potsdam conference arrangements;
   — maintaining the German legal doctrine in its present form which questions the validity of the Potsdam Agreement as an act of international law and highlights the lawlessness of displacing Germans from the former eastern regions of the German Reich after World War II and the illegality of German estate expropriations;
   — the tendency present in Germany to make the suffering of the German nation toward the end of World War II and afterwards equal to the suffering of other nations which had become victims of German invasion and genocide;
   — the lack of political will demonstrated by the subsequent ruling groups of reunified Germany to finally close the issue of the property claims laid by German citizens (displaced people and their descendants) against Poland

in the Polish-German relations *via* settling the individual compensation claims by the German state itself[81];

— the postulates occasionally put forward in Poland which concern obtaining war reparations from Germany as a financial compensation for the human and material losses suffered by Polish citizens and Polish economy during the German invasion of Poland and its subsequent long-term occupation.

Beside the above, the significant differences between the stances of Poland and Germany in recent years concerned the issues related to the EU integration model and the degree of support for the policy conducted by the administration of Donald Trump. Regarding the further integration process of the European Union, the government led by Chancellor A. Merkel advocated its deepening, including integration strengthening in the field of defence. Subsequent Polish governments after 2015 supported the intergovernmental (confederational) integration model and renationalisation of the EU integration process. Interestingly, by striving to weaken European integration, the decision makers of the Polish foreign policy came closer not only to the policy of D. Trump, who criticised EU integration, but also to the policy of Russia's President V. Putin, who was interested in EU weakening as well.

In the context of the EU and NATO weakening policy pursued by D. Trump and the increasing discrepancies in transatlantic relations, German politicians said that Europe was no longer able to rely on the USA utterly and had to take its fate in its own hands. In August 2018, German Minister of Foreign Affairs Heiko Maas said that the EU and Germany needed to build a counterbalance to the USA and create an alliance for multilateralism.[82] At the same time, Poland's security policy focused on strengthening the bilateral relations with the USA[83] even though President D. Trump demonstrated a business-like approach to ally

[81] See more in M. Stolarczyk: *Dylematy polityki niemieckiej Polski związane z zakresem wpływu obciążeń historycznych na międzypaństwowe stosunki polsko-niemieckie.* W: *Bezpieczeństwo międzynarodowe Polska —Europa — Świat. Księga Jubileuszowa dedykowana Profesorowi Ryszardowi Ziębie z okazji czterdziestolecia pracy naukowej.* Red. J. Zając, A. Włodkowska-Bagan, M. Kaczmarski. Warszawa 2015.

[82] Minister H. Maas supported a balanced partnership between Europe and the USA. In his opinion, the EU should become strong enough to be capable of opposing America on the agreement with Iran or the trade balance; in other words, it should create a counterbalance wherever the USA crossed the red line — https://www.dw.com/pl/szef-msz-niemiec-czas-na-nowa-wizje-partnerstwa-europy-z-usa/a- (accessed: 12.10.2018).

[83] George Friedman, an American political scientist and founder of the Stratfor platform, said in one of his interviews that, from that moment on, America was going to defend only those European countries which were important to its own interest. "We want to stop Russia. Poland and Romania are indispensable for that, but it is no longer about NATO. It is about bilateral arrangements." *Europa niebezpieczna sama dla siebie. Wywiad z George`em Friedmanem.* "Rzeczpospolita", 1—2 September 2018.

obligations. According to certain opinions, also in the Polish press, Poland reduced itself to the role of the USA's vassal. As the controversy concerning the USA—EU relations (especially the USA—Germany relations) increased, one of the main dilemmas in the Polish foreign policy was whether Poland should support the USA or the EU (Germany) in that dispute. Good relations with both countries are in Poland's interests.

Main stages of Poland's relations with the Russian Federation in the post-Cold War period and their characteristics

Poland's policy toward the Russian Federation in the years 1992—2018 can be divided into seven stages:

Stage one: building the foundations based on a treaty (1992—1993). At this stage, Poland regained full independence in its relations with the Russian Federation, the strongest manifestation of which was the withdrawal of the last troops of the former Soviet army stationing in Poland (1993) as well as the adoption of new formal and legal regulations as the basis for a new stage of the Polish-Russian relations in this scope. The most important agreement in this field was the Treaty between the Republic of Poland and the Russian Federation on Good Neighbourhood and Friendly Cooperation, signed on 22 May 1992.[84] Although the treaty did not resolve many disputable issues, it opened the door to the normalisation of the Polish-Russian relations and broad cooperation[85];

Stage two: the Polish-Russian relations in the shadow of the first post-Cold War NATO enlargement (1993—1999). The Polish-Russian relations at that time were determined not only by historical issues, but first and foremost by Poland's aspirations to join NATO and the negative impact of the first NATO enlargement, in which Poland took part, on Russia's security according to an assessment carried out by the Russian ruling groups (a deterioration of Russia's geostrategic location). To many politicians and journalists as well as other opinion-forming groups in Poland, the main yet not declared reason for Poland's membership in NATO was the sense of a hazard posed by Russia. Krzysztof Fedorowicz wrote that the majority of Polish society viewed Russia as a continuation of the USSR,

[84] See the text of the treaty in J. Kukułka: *Traktaty sąsiedzkie Polski odrodzonej.* Wrocław 1998, p. 226—231.

[85] The disputable issues not regulated by the treaty signed on 22 May 1992 included i.a. compensation for the victims of Stalinist crimes (which Russia refused to include in the treaty) and a full explanation of the Katyn massacre, the rehabilitation of its victims and compensation for their families.

with all relevant consequences (also historical ones) included.[86] Therefore, the Polish political elite demonstrated far-reaching scepticism concerning the need for building a European security system together with Russia. Russia's objection to NATO enlargement was commonly viewed in Poland as one of the most important examples confirming the rightness of the thesis dominating the Polish political discourse, according to which Polish security was indeed threatened by Russia as that country wanted to regain its influence in Poland and the objection constituted a manifestation of its imperial policy;

Stage three: the Polish-Russian relations in the context of finalising Poland's effort to become a Member State of the European Union (1999—2004), the second NATO enlargement in the post-Cold War period in 2004 (admission of i.a. Lithuania, Latvia and Estonia) and the effort made by the decision makers of the Polish security policy to strengthen the bilateral relations with the USA, first and foremost in politics and security. One manifestation of that was the utter support of the Polish ruling groups for the foreign policy conducted by the administration of President George W. Bush and the effort to show ally loyalty to the USA (e.g. *via* the participation of Polish soldiers in the 2003 American invasion of Iraq at the side of US soldiers) as well as the striving of Polish politicians for the elements of the American Ballistic Missile Defence to be distributed in Poland. Contrary to certain forecasts, Poland's admission to NATO did not result in better Polish-Russian relations.[87] Just the opposite: the NATO membership and the resulting increased sense of security encouraged a part of the Polish political circles to conduct a more resolute policy toward Russia. Poland's support for the NATO military intervention in Serbia (1999), for the resulting change of NATO from a defensive alliance to a defensive-offensive alliance and for the most controversial actions taken by the administration of President G.W. Bush in the international policy together with Russia's objection to those actions constituted a significant burden to the Polish-Russian relations as well. However, despite the numerous disputable issues in the Polish-Russian relations, both parties undertook actions in the discussed period in order to strengthen the normalisation process of those relations. A very important event on that way was the official opening of the Polish military cemeteries in Katyn (28 July 2000) and Mednoye (2 September 2000), with Poland's Prime Minister Jerzy Buzek and representatives of the Rus-

[86] K. Fedorowicz: *Polityka Polski wobec Rosji, Ukrainy i Białorusi w latach 1989—2010.* Poznań 2011, p. 99.

[87] Friedbert Pflüger, a member of the CDU/CSU fraction in the Bundestag, wrote that Poland's NATO membership was not an obstacle to Polish-Russian reconciliation but its prerequisite because only those who felt safe were able to maintain the bonds of partnership and develop cooperation. E. Pflüger: *Warunek pojednania Polski z Rosją.* "Dialog" 1998, nr 2, p. 104. According to Z. Brzeziński, the Eastern enlargement of NATO in 1999 liquidated the area of strategic emptiness between Russia on one side and Germany and Western Europe on the other, thus offering real possibilities of a slow yet consistent Polish-Russian reconciliation. *Wschodni filar. Rozmowa ze Zbigniewem Brzezińskim.* "Polityka" 1999, nr 11.

sian government participating in the ceremonies. The period of 2001—2002 in the Polish-Russian relations also saw a mutual intensification of political visits on the highest level, including a visit of President Vladimir Putin to Poland (16—17 January 2002) and a visit of President Aleksander Kwaśniewski to Russia (6 June 2002). When Poland joined the EU on 1 May 2004, one of the most important motives behind its actions within the EU's Eastern dimension was the striving to accelerate the Westernisation of Ukraine, Belarus and Moldova as part of the EU policy and weaken Russia's influence in those countries, which strengthened the differences between Poland's and Russia's strategic interests in their policies toward Eastern European countries. A very meaningful example of that was the involvement of Polish politicians in the Orange Revolution in Ukraine at the turn of 2004 and 2005 and their support for one of the sides (Russia's adversaries) fighting for power in that country as well as the definitely negative assessments of that involvement in Russia.

Stage four: an escalation of tension and an intensification of negative emotions in the Polish-Russian relations during the implementation of a political project called the Fourth Republic of Poland [IV RP] by the PiS government (2005—2007). That stage was predominantly related to the implications of the Polish politicians' involvement in the Orange Revolution in Ukraine at the end of 2004 and the tough policy toward Russia and Germany conducted by the government formed by PiS and its coalition partners in the years 2005—2007. The PiS government put forward a thesis that Poland's interest in its relations with Russia and Germany had to be pursued in a better way than before 2005. In the middle of the first decade of the 21st century, the competition for the direction of Ukraine's transformation became one of the fundamental tension-inducing issues in the Polish-Russian relations. Besides, Poland's policy toward Russia saw an increase of controversy in connection i.a. with: the historical burden stemming from the different historical memories of Poles and Russians; disputes over the agreement of September 2005 on the building of a German-Russian gas pipeline along the bottom of the Baltic Sea, signed by German and Russian concerns; the effort made by the PiS government and President Lech Kaczyński for the elements of the American Ballistic Missile Defence to be distributed in Poland; Poland's support for the idea of another Eastern enlargement of NATO to include Ukraine and Georgia; and disputes over Russia's decision concerning the introduction of a temporary ban on importing Polish meat. It should be underlined that the decision makers of the Polish security policy at that time highlighted the Russian hazard to Poland's independence predominantly in the area of energy security, while the military hazard was mentioned less often. Both the theory and practice of the Eastern policy conducted by PiS was clearly marked with the attachment of its politicians to the Intermarium project.

Stage five: attempts to make Poland's policy toward Russia more pragmatic in the first years of the government formed by the PO/PSL coalition (2008—2010).

That stage entailed new elements in Poland's Eastern policy pursued by the PO/PSL government. The new decision makers of the Polish foreign policy, led by Prime Minister Donald Tusk, declared their will to improve the relations with Russia and their government implemented a more realistic and pragmatic Eastern policy which was simultaneously less ideological. The PO/PSL government representatives expressed their willingness to conduct the dialogue with Russia while accepting that country as it was.[88] They simultaneously stressed that Poland had justified aspirations to co-shape the EU's Eastern dimension and support Ukraine's pro-Western ambitions.[89] Such was the objective i.a. of the Polish-Swedish Eastern Partnership project,[90] submitted in 2008 and approved in March 2009 by the European Council as an EU proposal. Russia viewed Eastern Partnership as another manifestation of Poland's anti-Russian actions, that time within the EU, and as a project aimed at pushing the included countries away from Russia and broadening the EU's zone of influence at Russia's cost. The Polish effort aimed at adopting a declaration promising Ukraine and Georgia NATO membership quickly, which was supposed to be passed by the NATO Member States at the NATO Bucharest Summit (2—4 April 2008), was criticised even more in Russia.[91] The Russian-Georgian conflict concerning South Ossetia in August 2008 led to a significant temporary deterioration of the Polish-Russian relations. It also accelerated the works on the signing of the Polish-American agreement on the Ballistic Missile Defence (20 August 2008). Russia saw the installation of the American Ballistic Missile Defence elements in the territory of Poland as a deterioration of its own geostrategic situation *via* a considerable weakening of the deterring power possessed by Russian nuclear weapons.[92]

On 10 April 2010, 96 people died at a plane crash near Smolensk. They included President of Poland Lech Kaczyński and his wife, representatives of all the Polish parties present in the parliament and Polish Army commanders, who were going to a celebration commemorating the Katyn massacre victims on the 70th anniversary of that event. The Smolensk disaster, and in particular

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[88] *Presentation of the action plan for the Council of Ministers by Prime Minister Donald Tusk with a motion for a vote of confidence, 23 November 2007* — www.rp.pl/artykul71439.html?p=33 (accessed: 11.03.2014).

[89] Ibidem.

[90] The program included Ukraine, Moldova, Georgia, Armenia and Azerbaijan; it also allowed for an inclusion of Belarus.

[91] Poland's efforts to include such a provision in the NATO Summit final declaration eventually failed i.a. due to Germany's objection to NATO's assuming that obligation toward Ukraine.

[92] On 17 September 2009, President B. Obama informed Poland that his administration was going to withdraw from building the Ballistic Missile Defence version proposed by the administration of G.W. Bush. Still, it meant a modification of the system rather than giving up its construction entirely.

the diverse opinions on its causes, strengthened the divisions in Polish society as well as the attitudes of aversion and hostility toward Russia. A significant part of the Polish political circles and Polish society was unable or unwilling to accept the version which suggested an unplanned air disaster (aviation accident) as the cause of death of the Polish president and those accompanying him, the source of which was the failure to observe relevant procedures both by Poland and Russia. As time went by, an increasing number of Poles supported a view that the disaster had been caused by an attempt on the lives of the Polish delegation members made by Russia's authorities and secret service. The conclusion, highlighted especially by PiS politicians, was that Poland should take actions aimed at the weakening and isolation of Russia as well as minimising the cooperation with that country instead of making it closer.

Stage six: a deadlock in the Polish-Russian relations in the years 2011—2013, caused predominantly by internal disputes in Poland over the nature of its policy toward Russia after the disaster of the Polish President's plane near Smolensk as well as Polish-Russian disputes over the disaster causes, Poland's reservations about the relevant investigation conducted in Russia and Russia's refusal to return the wreck of the plane in question. Following the Smolensk disaster, the issues concerning the nature of Poland's policy toward Russia and the Polish-Russian relations became one of the most important areas of political fight in Poland. The ruling coalition and the main opposition parties as well as the circles that supported them demonstrated considerable differences in the perception of the Polish national interests in the relations with Russia as well as the manners of their accomplishment. The government led by Prime Minister D. Tusk did not manage to prevent the incredibly emotional internal discussion on the causes and consequences of the Smolensk disaster from causing the stagnation of the Polish—Russian political relations, which progressed especially from the middle of 2011 and gradually paralysed those relations. The policy of the PO/PSL government toward Russia was largely conducted under the pressure of the right-wing opposition parties and became increasingly similar to the policy proposed by the leaders of PiS.

Stage seven, which began at the end of 2013. The Polish-Russian relations in subsequent years were nearly completely determined by the Ukrainian crisis, Crimea incorporation by Russia, the conflict in eastern Ukraine as well as the political and economic sanctions imposed on Russia by the West. When listening to numerous Polish politicians, journalists and analysts of international affairs, especially in the years 2014—2015, one was able to conclude that the Russian army was preparing for an invasion of Poland.[93] Any rational, objec-

[93] *Generał Stanisław Koziej nie wyklucza inwazji Rosji na Polskę* — http://wiadomosci.wp.pl/kat,1342,title,General-Stanislaw-Koziej-nie-wyklucza-inwazji-Rosji-na-Polske,wid,17272158,wiadomosc.html (accessed: 6.03.2015).

tive or simply common-sense analysis of the reality was suppressed by negative emotions. The media were permeated with anti-Russian war hysteria and voices advocating resolute actions against Russia. Fairly few people in Poland at that time reckoned that there were no reasons why Russia could be willing to pose a military hazard to Poland or other Central European NATO Member States.[94] A similarly small group of people believed that the main hazard to Poland's security was not a military hazard posed by Russia, but Poland's own internal tendency to confront Russia.[95]

Poland and the USA were the Western countries which advocated imposing the most severe sanctions possible on Russia. In 2014 and subsequent years (till the middle of 2019, when this article was being finalised), Poland froze its political relations with Russia on the highest level. Polish politicians underlined that it would only be possible to resume the normalisation of the relations with Russia after solving the Russian-Ukrainian conflict in eastern Ukraine. However, they did not explain precisely what they meant by "solving the Ukrainian conflict." Did they expect full implementation of the Minsk II peace agreement provisions or, in addition, returning Crimea to Ukraine, which seems unlikely? The conflict in eastern Ukraine set a new turning point in the Polish security policy and the Polish-Russian relations. Polish authorities officially started to treat Russia as the main hazard to Polish and international security, including a military hazard in the form of a direct invasion.[96]

Beside Crimea incorporation by Russia and the conflict in eastern Ukraine, the important disputable issues in the Polish-Russian relations at that time included: historical matters, including the disassembly in Poland of the monuments commemorating the Soviet soldiers who fell in the territory of Poland during the fights with the German Reich; construction of the Ballistic Missile Defence elements in Poland by the USA; and the Smolensk disaster,[97] including Russia's refusal to return the wreck of the Tu-154M plane to Poland.[98] In general, neither Poland nor Russia showed any political will to improve their mutual relations in the years 2014—2018. Instead, either party blamed the other for the freezing of political contacts and expected it to resume the effort to improve them.

[94] See more in: M. Stolarczyk: *Rosja w polityce zagranicznej Polski…*

[95] A. Śliwiński: *Non possumus!* "Polityka Polska" 2015, nr 1, p. 159—160.

[96] See more in: M. Stolarczyk: *Rosja w polityce zagranicznej Polski…*

[97] On 27 March 2015, Polish Chief Military Prosecutor's Office announced that the Polish President's plane crew was the main party to blame for the Smolensk disaster.

[98] The Russian authorities argued that the plane remnants constituted evidence in the Smolensk disaster investigation going on in Russia and that their return to Poland would only be possible after concluding that investigation.

Main areas of divergent interests in Poland's relations with Russia in the second decade of the 21st century

Although the Polish-Russian relations in the post-Cold War period underwent many stages, each of which was specific in its own way, they featured predominantly continuous elements. The key one was the great divergence of interests between Poland and Russia. The main disputable issues in the Polish-Russian relations in the second decade of the 21st century as well as in the earlier years were as follows:

1. **The European security system**, including the role of NATO in its shaping and the subsequent NATO enlargement phases, especially those admitting the post-Soviet countries. Poland and many other NATO Member States supported a thesis that the core of the international security system in post-Cold War Europe should be the North Atlantic Alliance, including the USA's military presence in Europe. Representatives of Russia's authorities did not share that opinion, especially after NATO's aggression against Serbia in 1999. Moreover, Russian politicians frequently argued that NATO was a Cold War relic and the security system in post-Cold War Europe should be built with Russia's participation. After obtaining NATO membership, Poland became one of its Member States which consistently and most resolutely advocated an admission of the Baltic states and other post-Soviet states, first of all Ukraine and Georgia, to the alliance. Russia assessed those actions as very unfavourable to its security interests in the area of its neighbours, believing that NATO was trying to encircle it. The Russian authorities reckoned that Poland's actions were those of a contractor executing the USA's policy toward the post-Soviet region.

It seems that in the 1990s, when the USA's international position as the only superpower kept growing, while Russia's position was weakening as it was struggling with a crisis, the world wasted the chance to build a cooperative European security system with Russia's participation. In the middle of the 1990s, American politics was conquered by an option which assumed the maximum geopolitical use of Russia's economic, political and military weakness and an increase of the USA's influence in the post-Soviet region. It was one of the reasons why the chance to build a cooperative European security system with Russia's participation became increasingly distant in the subsequent decades of the post-Cold War period.

2. **The energy security system** and Poland's effort to diversify its energy resource supplies as well as Russia's actions aimed at diversifying its gas and crude oil transfer routes to Western Europe *via* bypassing the territories of Ukraine and Poland. Even though the dependence of

Polish economy on the import of Russian gas was much smaller than that of many other EU Member States, Poland put the strongest emphasis of them all on the hazard to the EU's energy security stemming from excessive dependence on Russian gas supplies.[99] It also seems that the Polish ruling groups too often equated the Polish and Ukrainian energy security interests in the Polish energy policy in connection with Russian gas supplies, sometimes supporting Ukraine's interest more than Poland's interest[100];

3. **The historical dispute**, in which Poland particularly underlined the need for a comprehensive explanation of the Katyn massacre and some form of compensation satisfying the Polish party, granted to the families of the persons murdered in Katyn and other locations in the former USSR. The historical memories of Poles and Russians were extremely different for many matters and no mutual interpretation of numerous historical events or processes will probably be developed in the future, either (e.g. the assessment of USSR policy toward Poles during World War II and after its end; the scope of settling accounts with the Stalinist past in Russia; or the nature of the historical policies conducted by subsequent Polish and Russian governments in the post-Cold War period). One must realise that disputes over the interpretation of history may last not only many years, but also many decades. However, the anti-Russian attitudes of a significant part of Polish society were to a very large extent maintained or virtually strengthened by certain right-wing Polish political parties and the Polish journalist environment, the majority of which supported those parties. Both groups made the policy of "intransigence toward Russia" one of the most important elements of their political identity as well as one of the most significant means of mobilising their electorate.[101]

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[99] Kamila Pronińska writes, "However, contrary to most EU Member States, where the import dependence itself is seen as the main problem, Poland is first and foremost worried about the dependence on a country which posed a hazard to its existence and sovereignty. The significance of historical resentments in the Polish—Russian relations seems to be crucial in the shaping of Polish perception of energy security". K. Pronińska: *Strategie bezpieczeństwa energetycznego państwa na przykładzie wybranych krajów UE.* W: *Państwo w teorii i praktyce stosunków międzynarodowych.* Red. M. Sułek, J. Symonides. Warszawa 2009, p. 284.

[100] For example, in the 1990s, when Russia made Poland offers to become the main transfer country for the Russian gas supplies sent to the West, subsequent Polish governments did not agree to the bypassing of Ukraine for the sake of political solidarity with that country. Consequently, it is justified to ask: If the Polish ruling groups had made a different decision at that time, would the gas pipeline running along the bottom of the Baltic Sea and bypassing Poland have been built at all?

[101] See more on this topic in M. Stolarczyk: *Prawicowy populizm w Polsce jako jedna z barier na drodze do poprawy stosunków polsko-rosyjskich.* "Krakowskie Studia Międzynarodowe" 2011, nr 4.

4. **The contradictory visions of building an order in Eastern Europe, first of all in Ukraine (a geopolitical conflict of interest concerning the shape of the Eastern European order).** As time went by, especially after Poland had joined NATO and the EU, the future of Eastern European countries, especially Ukraine and Belarus, became an issue of fundamental importance to the Polish-Russian relations. Both Russia and Poland treated Eastern European countries as a certain security buffer separating the Western security zone built under US leadership from the security zone built by Russia in the post-Soviet region. However, the two countries' visions of the shape of that buffer were fundamentally different. The Polish ruling groups believed that the improvement of Poland's security required strengthening of the Ukrainian buffer *via* admitting the latter country to NATO and the EU. On the contrary, the Russian ruling groups reckoned that the Ukrainian buffer would strengthen Russia's security if Ukraine obtained the non-aligned status or was included in the security system built under the aegis of Russia in the CIS area.

The dominant stance in Poland stated that the relations with Russia were very difficult, but it was not Poland's fault. The Russian party was the only one blamed for the freezing of the Polish-Russian political relations. It is hard to agree with that stance because subsequent Polish governments expected that Russian authorities would nearly fully acknowledge the Polish stance on national and international security, but they showed no understanding of the Russian interests in that scope themselves. I agree with the opinion that Poland will find it hard to conduct an effective foreign policy in the East and the West without taking into account at least a part of Russia's interests concerning security and other matters.[102] Adam Daniel Rotfeld justifiably argues that diplomacy is the search for a balance of interests and the manner of reaching a compromise with mutual respect.[103] The problem is that the decision makers of the Polish foreign policy too often viewed any compromise in the relations with Russia virtually as a betrayal of Polish interests.

Similarities and differences in Poland's policies toward Germany and Russia in the post-Cold War period

Germany was Poland's main economic partner in Europe and worldwide from the beginning of the 1990s till the end of the second decade of the 21st cen-

[102] S. Bieleń: *Polska między Niemcami a Rosją — determinizm czy pluralizm geopolityczny?* W: *Polityka zagraniczna Polski po wstąpieniu do NATO i do Unii Europejskiej. Problemy tożsamości i adaptacji.* Red. S. Bieleń. Warszawa 2010, p. 270.

[103] A.D. Rotfeld: *W poszukiwaniu strategii.* Olszanica 2018, p. 103.

tury. Germany's share in Polish trade reached nearly 30% in 1991 and approx. 25% in 2017 (27.4% in the export and 23% in the import). In 2017, the Polish-German trade value significantly exceeded 100 billion EUR. In the same year, Russia took the third place in Polish import (13.2 billion EUR) and the seventh place in Polish export (6.2 billion EUR). Therefore, the Polish-Russian trade value reached less than 20 billion EUR. Nonetheless, it must be mentioned that, despite the still binding economic sanctions imposed on Russia in the middle of 2014 and Russia's counter-sanctions imposed on the West, including Poland, as well as the drop of the Russian consumers' buying power in recent years, Poland's export to Russia in 2017 increased by 20.1% and the import increased by as much as 27.7% in comparison with 2016. It is estimated that Poland has lost approx. three billion EUR since 2014 due to the lower export to Russia.[104] By way of comparison, despite the officially maintained German sanctions against Russia, German companies increased the export to Russia in 2017 by 20%, reaching 26 billion EUR, while German import from Russia at the same time increased by 18.3% and reached 31 billion EUR. The total German-Russian trade value in 2017 was 57 billion EUR and was much lower than before the conflict in eastern Ukraine (80 billion EUR). As the data show, Russia's share in Poland's trade was much lower than Germany's share. Still, one must remember that Russia was Poland's most important economic partner in the Eastern dimension of the Polish foreign policy in the discussed period.[105]

One of the most characteristic features of the Polish-Russian trade was Poland's very high debit balance (e.g. more than 12 billion USD in 2012), which stemmed from the trade structure and the dominant position of gas and crude oil in Polish import from Russia (approx. 75—80%). The characteristic features of the Polish-Russian economic relations included their considerable dependence on the nature of the Polish-Russian political relations. Such dependence of the economic dimension on the political one did not occur in the Polish—German relations.

In Poland's policy toward Russia, contrary to its policy toward Germany (especially in the 1990s, when the Polish-German reconciliation process was initiated in the intergovernmental Polish-German relations), there was no political will to make a fundamental breakthrough despite the occasional attempts to improve the mutual relations made by Poland and Russia alike. Even though the Polish-German relations feature numerous disputable issues, the ruling groups of both countries usually showed willingness to solve and ease the appearing problems instead of escalating the disputes. Such will was definitely smaller in

[104] https://www.rp.pl/Gospodarka/303189919-Wymiana-handlowa-Rosja-to-niestabilny-rynek (accessed: 1.10. 2018).

[105] In 2016, the estimated value of Polish export to Ukraine was approx. 16 billion PLN, while the import reached approx. 8 billion PLN. Ukraine accounted for 1.9% of Polish export and 1% of Polish import — www.mapa.kuke.com.pl/ukraina.html (accessed: 4.10.2018).

the Polish-Russian relations on both sides.[106] The Polish-Russian relations were much more conflictual than the Polish-German relations. In general, the Polish-German relations were dominated by the tendency to ensure development and strengthen the cooperation, while the Polish-Russian relations were usually critical in nature. The relations with Russia definitely stirred up more negative emotions in Polish society than did the relations with Germany. One cause of that situation was the fact that the disputable issues in the Polish-Russian relations concerned the strategic interests of both countries to a much larger extent than did the Polish-German relations.

The fear of a German capital inflow gradually decreased in Poland in the subsequent years after the reunification of Germany. On the contrary, the fear of a Russian capital inflow was very strong in Poland in the subsequent decades of the post-Cold War period. Though the scale of Russian investments in Poland was small[107] in comparison with i.a. the dominating German investments, the attempts at increasing the Russian ones were usually perceived as a hazard to Poland's national security. Subsequent offers made by Russian companies were typically analysed in terms of politics and security, not in terms of business. Poland was worried that Russia might gradually take control of the important branches of Polish economy and therefore influence Polish political life. Examples include preventing Lukoil from the purchase of the Gdańsk Refinery (currently Grupa Lotos) and the Polish government's objection to Viatcheslav Moshe Kantor's attempts at purchasing the Tarnów-based Azoty concern.

In the entire post-Cold War period, Russia was the main point of reference in the Polish decision makers' perception of the Polish national and international security policy. However, that leading role stemmed mainly from viewing that

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[106] On 17 August 2012, a mutual address was signed by Patriarch Kirill of Moscow and Abp J. Michalik. Still, it is hard to predict the degree to which that call of both Churches for a Polish-Russian reconciliation will translate into the practice of the Polish-Russian relations and make Poles' attitudes toward Russia more positive. One should remember that many years passed from the Pastoral Letter of the Polish Bishops to their German Brothers of 18 November 1965, which featured the statement "We forgive and ask for forgiveness", to the Polish-German reconciliation process, which began after 1989. Contrary to what happened in the Polish-German relations, the reconciliation process in the Polish-Russian relations will be longer and harder. This provokes the following question: How long will it take the Polish and Russian ruling groups to free the current Polish-Russian relations "from their enslavement to history and break the determinism of hostility" the way it has largely been accomplished in the Polish-German relations? See: S. Bieleń: *Szanse na pojednanie polsko-rosyjskie w świetle wyzwań geopolitycznych.* W: *Geopolityka w stosunkach polsko-rosyjskich*…

[107] In the years 1990—2014, foreign investors spent nearly 600 billion EUR in Poland, less than 2 billion EUR of which were Russian investments. M. Rabij: *Rosyjski kapitał w Polsce? Prawie nieobecny* — biznes.newsweek.pl/rosyjskie-inwestycje-w-polsce-newsweek-pl, artykuly,285428,1,html (accessed: 20.05.2014). At the beginning of 2013, only five companies with Russian capital and as many as 389 companies with German capital were registered in Poland.

country as the main hazard to Poland's security interests, not as a recognised partner in their accomplishment, as in Germany's case. When Poland joined NATO, Poland and Germany became allies. Russia, however, was perceived, albeit with varying intensity, as the main hazard to Poland in the practice of the Polish foreign policy in the subsequent decades of the post-Cold War period.[108] The fear of Russia and the sense of hazard posed by that country determined Poland's security policy.[109] That stance matched the history of the 19th- and 20th-century Polish political thought, in which the main feature of virtually all the Polish political currents was confrontation with Russia, the anti-Russian attitude and the striving to "push Russia away to Asia."[110]. The Polish-German relations in the entire post-Cold War period were definitely better than the Polish-Russian relations, which were usually in crisis. That state was caused not only by Russia, but also subsequent Polish governments, the actions of which often strengthened the sense of a Russian hazard perceived by Polish society.

Due to the leading role of the Russian factor in Poland's security policy, many truly significant actions taken within the most important dimensions of the Polish foreign policy were determined by the sense of a hazard posed by Russia. The areas determined by that factor to the largest extent included Poland's relations with the USA, policy implemented within NATO and numerous actions taken in the EU, especially as part of the EU's Eastern dimension, including Polish policy toward Ukraine. A permanent element of Poland's Eastern policy in the post-Cold War period was the effort to develop the cooperation with Ukraine and other post-Soviet states and integrate them with the West, with a simultaneous effort to isolate Russia and "push" it out of Europe. The consideration for "the Russian factor" was also the leading one among the actual yet not declared reasons why the subsequent Polish governments of the 1990s aimed at NATO membership and the Polish ruling groups in the first and second decade of the 21st century made effort for the elements of the American Ballistic Missile Defence to be installed in Poland. Stanisław Bieleń writes that the circles ruling Poland treated Russia "as a simple continuation of the Soviet Empire — a timeless existential enemy."[111] It seems justified to say in this context that the anti-Russian attitude was a strategic factor in the Polish

[108] A relevant survey conducted in Poland in August 2014 showed that nearly 83% respondents believed Russia's expansive policy was the greatest hazard to Poland's security. In August 2017, 40.1% respondents shared that opinion. M. Kolanko: *Rosja już nie taka straszna.* "Rzeczpospolita", 17 August 2017.

[109] See J. Zając: *Poland's Security Policy: The West, Russia, and the Changing International Order.* London 2016.

[110] R. Juchnowski: *Miejsce geopolityki w polskiej myśli politycznej*…, p. 319 and subs. pages.

[111] S. Bieleń: *Stosunki Unia Europejska—Rosja.* W: *Dyplomacja czy siła? Unia Europejska w stosunkach międzynarodowych.* Red. S. Parzymies. Warszawa 2009, p. 233.

politics of the post-Cold War period.[112] Many Polish politicians and journalists viewed the intensity of the anti-Russian attitude as the main criterion of patriotism.[113] The Russian factor played a significantly greater role in the shaping of the Polish foreign policy within bi- and multilateral relations than did the German factor.

Poland's policy toward Russia depended on the USA's policy toward Russia much more than did Germany's policy in this scope. A noticeable number of people believed that it was beneficial to the Polish security interests whenever the American-Russian relations worsened because that enhanced Poland's role in the USA's foreign policy and made Poland "a great front line country countering Russia's ambitions in Europe."[114] The German-American relations in the first and second decade of the 21st century featured considerable areas of divergent interests, e.g. those concerning the resolution of the Iraqi, Libyan and Iranian problems. In most of those disputes, except the manner of solving the Libyan problem in 2011, Poland's stance was usually identical or similar to the American stance.

In the subsequent decades of the post-Cold War period, "the German problem" defined as sense of a political, economic and military hazard diminished in Poland, while the significance of "the Russian problem" increased. Poland's policy toward Germany in the last 30 years did feature occasional disputable issues which were sometimes viewed as new manifestations of "the German problem" (e.g. regarding the growth of Germany's role in the EU in recent years), but the significance of "the German problem"[115] in Polish politics was much smaller than that of "the Russian problem". In this context, the crucial factor in Poland's policy toward Russia is the answer to the following question: Was the perception of the Russian hazard by the decision makers of the Polish foreign and security policies as well as in the Polish media in the discussed period adequate to the actual (real) hazard or was that hazard considerably exaggerated? Was that first and foremost a result of treating "the Russian problem" instrumentally too often in the Polish internal and foreign policies? Did history, the cultural and civilisational factors, prejudice and stereotypes exert an excessive influence on Poland's policy toward Russia? One must remember that the coexistence of

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[112] See: K.B. Janowski: *Polityka wschodnia RP*, p. 9 — http://karol-b-jaowski.waw.pl/POLITYKA%20WSCHODNIA%RP.pdf (accessed: 4.09.2018).

[113] See B. Łagowski: *Polska chora na Rosję.* Warszawa 2016.

[114] A. Talaga: *Chłód na linii USA—Rosja szansą dla Polski.* "Rzeczpospolita", 17—18 August 2013.

[115] One should remember that "the German problem" was mentioned also in the German political discourse regarding the growth of Germany's international role, mainly within the EU. See *Europa und die neue Deutsche Frage. Ein Gespräch mit Jürgen Habermas, Joschka Fischer, Henrich Enderlein und Christian Calliess.* "Bläter für deutsche und internationale Politik" 2011, Nr. 5.

convergent and divergent interests is a permanent element of interstate relations. Their scope does change though, especially from the medium- and long-term perspective. That evolution is determined by the changing internal conditions as well as those present in the international environment. Still, whether the differences of interests in bi- and multilateral relations lead to confrontations or compromises depends first and foremost on the decision makers of the foreign policies pursued by the countries.

One of the most characteristic features of the Polish foreign and security policies in the post-Cold War period was the perception of Russia from the angle of history.[116] The historical burden (historical memory) in the Polish-Russian relations was much greater than in the Polish-German relations. A discussion on the assessment and comparison of the two greatest totalitarian regimes of the 20th century, Hitlerism and Stalinism, was going on with varying intensity in Poland, Germany, Russia and other countries in the analysed period. As time went by, the tendency to relativise the crimes of German fascism intensified in Germany. The dominant stance in Russia stated that Hitler's rule had been much more criminal than Stalin's. The great revision of the history of World War II and the post-war years which took place in Poland after 1989 strengthened the tendency to "shift the emphasis from Auschwitz to Katyn". An important part of the discussion on German fascism and Soviet Stalinism was the search for an answer to the question about the scope of German and Russian guilt toward Poland and Poles. A conviction that the discussion about guilt should cease belabouring the guilt of Hitlerism and centre around Stalinism gradually strengthened both in Poland and Germany. Even though German occupation claimed a significantly higher number of lives in Polish society than did Soviet occupation,[117] the tendency to equal German occupation with the Soviet domination after World War II strengthened in Poland after 1989. One should remember here that it was the policy of the German Reich, not of Soviet Russia, that threatened the biological existence of the Polish nation.[118]

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[116] See more in: *Pamięć i polityka historyczna w stosunkach polsko-rosyjskich.* Red. S. Bieleń, A. Skrzypek. Warszawa 2017.

[117] The Institute of National Remembrance (IPN) estimates that German occupation claimed the lives of 5.470—5.670 million Polish citizens, whereas the Soviet Union killed approx. 150 thousands of Polish citizens from 1939 to the beginning of the 1950s. M. Karnowski: *Nowy bilans ofiar II wojny światowej opublikowany przez Instytut Pamięci Narodowej.* "Dziennik", 26 August 2009.

[118] Ryszard Stemplowski indicates that the Polish-German conflict was extreme in nature, while Poland's conflict with Russia had a more complex structure. "German Nazis, the then Germans, rejected us completely, reckoned that we were subhumans in general and directly threatened our existence, while Russian Communists first and foremost wanted to make Poland resemble Russia by force and threatened mainly our identity." R. Stemplowski: *Wprowadzenie do analizy polityki zagranicznej RP.* Wyd. II. T. 1. Warszawa 2007, p. 121.

Poland was capable, albeit to a limited extent, of influencing Germany's policy toward Russia, i.a. *via* bilateral relations and the NATO and EU structures. However, it was not able to influence Russia's policy toward Germany in the same way, i.a. due to the dominance of disputable elements in the Polish-Russian relations, their critical nature and its own frequently confrontational policy toward Russia.

Main dilemmas of the Polish foreign policy at the end of the second decade of the 21st century stemming from Poland's geopolitical location between Russia and Germany

In Poland's relations with Germany

One of the main dilemmas present in Poland's relations with Germany concerned the constant increase of Germany's international role in the shaping of the EU and the international system in Europe and worldwide, including the growing superpower aspirations of that country's political decision makers. Bogdan Koszel used to emphasize that the period of German "circumspection" and "self-restraint" ended when Chancellor Helmut Kohl retired from politics in 1998.[119] The subsequent governments of reunified Germany showed an increasing political will to accept greater responsibility for solving international problems. That process significantly intensified in the second decade of the 21st century, first of all due to the Euro area crisis, the conflict in eastern Ukraine and the refugee and migration crisis. The main role in the effort made to overcome the Euro area crisis and solve the refugee and migration crisis was played by Germany.[120]

Out of the two tendencies coexisting in Germany's foreign policy, self-restraint in the international arena and accepting the growing responsibility for solving international problems, the second decade of the 21st century saw a definite strengthening of the second one. Germany's aspirations to increase its superpower role were confirmed in the most important document on the German security policy: the White Book. When German Minister of Defence Ursula von

[119] B. Koszel: *Mocarstwowe aspiracje Niemiec w Europie XXI wieku. Realia i perspektywy. Raport z badań.* Poznań 2012, p. 16.

[120] See E Cziomer: *Przesłanki i wyzwania poszukiwania nowej roli międzynarodowej Niemiec w dobie narastających kryzysów Unii Europejskiej — wybrane problemy badań i praktyki politycznej w XXI wieku.* "Krakowskie Studia Międzynarodowe" 2016, nr 1, p. 21—49.

der Leyen presented the White Book in Berlin on 13 July 2016, she underlined that Germany was ready to take over the leading role in the solving of political and humanitarian crises worldwide depending on the country's capabilities. "We are ready to assume responsibility and become the leader, but we know our limitations", said U. von der Leyen at a press conference.[121] The authors of the White Book saw Germany as a co-founder of a global international order.[122]

The problem for Poland and other countries was not the mere growth of Germany's international (superpower) role,[123] but the ways and forms of that growth and the degree of acceptance for Germany's suggested solutions to the problems appearing inside and outside the EU. Polish politicians took various stances on Germany's growing international role. On the one hand, some of them encouraged Germany to assume increasing responsibility for solving international problems in Europe. An example was the address delivered by Polish Minister of Foreign Affairs Radosław Sikorski in Berlin (28 November 2011), in which he called Germany to assume leadership but not dominance.[124] One the other hand, certain politicians, especially those from the PiS management, as well as a considerable part of the journalists and analysts supporting that political party, stated that it was another manifestation of the PO/PSL government's policy which aimed to turn Poland into Germany's voluntary satellite.[125] The government led by Prime Minister B. Szydło diminished Germany's role in the Polish foreign policy, which was exemplified i.a. by Germany's distant position in the exposé delivered by Polish Minister of Foreign Affairs W. Waszczykowski in the Polish parliament at the end of January 2016.[126] In practice, the Polish-German relations in the years 2016—2017 cooled considerably. In an interview from March 2017, Chair of PiS Jarosław Kaczyński stated, "Germany conducts a policy directed against our interests on all the important matters, from histori-

[121] *Berlin wydał Białą Księgę: zmieniły się Niemcy oraz ich rola w świecie* — http://www.tvn24.pl/wiadomosci-ze-swiata,2/berlin-wydal-biała-ksiege-zmieniły-sie-niemcy-oraz-ich-rola-w-swiecie,660713.html (accessed: 20.01.2017).

[122] See K. Szubart: *Biała Księga 2016 — niemiecka odpowiedź na obecne wyzwania w zakresie bezpieczeństwa*. "Biuletyn Instytutu Zachodniego", nr 266, 16 August 2016.

[123] See more in M. Stolarczyk: *Wzrost mocarstwowej pozycji Niemiec*…

[124] R. Sikorski: *Schyłek Unii nie jest przesądzony.* "Gazeta Wyborcza", 30 November 2011. In the same address, Minister R. Sikorski stated that he was probably the first Polish Minister of Foreign Affairs in history to say, "I fear German power less than I am beginning to fear German inactivity". R. Sikorski: *Schyłek Unii nie jest przesądzony...*

[125] See P. Żurawski vel Grajewski: *Polska wobec przywództwa Niemiec w Unii Europejskiej.* "Przegląd Zachodni" 2014, nr 1; M. Magierowski: *W roli przyzwoitki.* "Uważam Rze", 5—11 December 2011; Ł. Warzecha: *Satelita Niemiec.* "Rzeczpospolita", 3 April 2012.

[126] *Information on the Polish Foreign Policy Tasks in 2016, Presented by Polish Minister of Foreign Affairs Witold Waszczykowski in the Polish Parliament on 29 January 2016* — http://msz.govpl/aktualnosci/wiadomosci/minister_witold_waszczykowski_o_priorytetach_polskiej_dyplomacji (accessed: 3.02.2016).

cal policy to energy supply."[127] The Polish-German relations slightly improved in 2018, when Mateusz Morawiecki was the Polish Prime Minister and Jacek Czaputowicz was the Minister of Foreign Affairs in his government.[128]

The growth of Germany's superpower role sometimes results in forecasts that Germany will become a global superpower because Europe will soon prove too small for that country[129]. The second decade of the 21st century saw the strengthening of the German tendency to change from an EU head into a dominant state or even a hegemonic leader.[130] This raises questions about the implications of that situation for further European integration. Aleksander Smolar remarks that Germany's becoming the hegemonic leader exposes Europe's problem.[131] According to Roman Kuźniar, a worrying aspect of Germany's politics is the fact that the country increasingly often takes the floor in the name (instead) of the EU and makes unilateral decisions which strain the entire Community. "Germany is rising above the European Union and begins to replace it in global contacts. This does not help the EU and does not have to be good for its interests."[132] The same author posed the following question: What are the long-lasting consequences that might be suffered by European geopolitics due to the situation where the EU is weak, while Germany is strong and begins to rise above the EU or stand next to it?[133]

French political scientist Emmanuel Todd said in an interview, "Germany will be increasingly stronger and Poland will be doomed to it. One reason is that there is no counterbalance to Germany in contemporary Europe. Europe is no longer a counterbalance to Germany: it does as Germany says."[134]

Another extremely important issue is the degree to which the policy conducted by President of the United States Donald Trump, including his criticism of the EU integration process, support for Brexit and perception of the EU as a German domination tool, will influence Germany's role in the EU and in Eu-

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[127] *Kaczyński: Na szczycie w Rzymie również trzeba zachować się zdecydowanie* — http://wiadomosci.wp.pl/kat,1342,title,kaczynski-na-szczycie-w-Rzymie-rowniez-trzeba-zachowac-sie-zdecydowanie,wid,18731189,wiadomość.html (accessed: 20.03.2017).

[128] *Minister Jacek Czaputowicz o priorytetach polskiej dyplomacji w roku 2018…*

[129] R. Antczak: *Niemcy — za duże na Europę, za małe na świat, ale da się to zmienić.* "Wprost" 2016, nr 33.

[130] See more in M. Stolarczyk: *Kryzys uznanego (powszechnie akceptowanego) przywództwa Niemiec w Unii Europejskiej.* W: *Kryzysy w Unii Europejskiej w drugiej dekadzie XXI wieku. Uwarunkowania — przebieg — implikacje.* Red. T. Kubin, M. Stolarczyk. Katowice 2018.

[131] A. Smolar: *Kłopoty wymuszą integrację. Rozmowa z A. Smolarem.* "Tygodnik Powszechny" 2016, nr 1—2.

[132] R. Kuźniar: *Przegląd sytuacji strategicznej — aspekty globalne i regionalne.* "Rocznik Strategiczny" 2015/2016", T. 21, p. 28.

[133] Ibidem, p. 29.

[134] *Brutalna Europa. Rozmowa z Emmanuelem Toddem.* "Newsweek" 2015, nr 30, p. 45.

rope. What stance should Poland take in the American-German dispute, including the striving to weaken Germany's position? Good relations with the USA are in Poland's interests provided that they supplement and not substitute Polish relations with the FRG, France and other countries. It is true that one of the biggest hazards to Poland's geopolitical situation which must be avoided is bad relations with Russia and Germany simultaneously.[135]

There are many signs that the growth of Germany's dominant role in the EU will strengthen in the oncoming years. At the same time, the crisis of Germany's acknowledged (commonly accepted) leadership in the EU is progressing.[136] This process may be a significant factor accelerating the disintegration of the EU as we know it. It would mean a considerably accelerated implementation of the "German Europe" scenario and departing from the "European Germany" conception.[137] This raises several questions: What will the implementation of that scenario imply for the European international system as well as the foreign and security policies of Poland and other states? Is it justified to fear that Germany's increasing tendency to dominate or even change into a hegemonic leader will result in the formation of Mitteleuropa as that country's zone of influence?[138] Due to the crises emerging in the EU, the forecasts mentioning progressive EU disintegration or even its collapse and the evolution of the post-Cold War international system (from unipolarity to multipolarity), some people believed that those processes would result in the formation of three zones of influence in Europe: the French zone in Western and Southern Europe, Mitteleuropa led by Germany and the Russian zone in the area of former USSR.[139]

Taking into account Germany's role as Europe's biggest superpower not only in economy, but also in political terms, the extremely important challenges to the Polish foreign policy are contained in the following questions: Is it in Poland's interests to support most of Germany's actions in the EU and beyond? Does the Trimarium conception, which has been promoted since the end of 2015 and assumes the consolidation (formation) of a block of Central European states from the Baltic Sea to the Black Sea and the Adriatic Sea under Poland's leadership (12 states), relate only to the sense of a hazard posed by Russia regarding energy security (mainly gas supplies) or does it also concern, albeit to a lesser extent, the German hazard (an attempt to counterbalance Germany's

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[135] A. Talaga: *Dmuchać na Niemcy.* "Rzeczpospolita", 23 December 2015.

[136] See more on this topic in M. Stolarczyk: *Kryzys uznanego (powszechnie akceptowanego) przywództwa Niemiec…*

[137] See H. Kundnami: *The Paradox of German Power.* Oxford 2015.

[138] *Niemcy na drodze do Mitteleuropy. Dyskusja.* "Polityka Polska" 2016, nr 7—8; compare: B. Koszel: *Mitteleuropa rediviva? Europa Środkowo- i Południowo-Wschodnia w polityce zjednoczonych Niemiec.* Poznań 1999.

[139] T. Marczak: *Oś Paryż — Berlin — Moskwa a Międzymorze.* "Polityka Polska" 2016, nr 7—8, p. 36.

dominant role in the EU)? Is Trimarium, as an idea supported by the administration of Donald Trump, an instrument used by the USA to weaken the EU in its present form by intensifying its internal divisions and strengthening the USA's influence in the Trimarium Member States? Is that project being implemented mainly because of the aim to block the construction of Nord Stream II, inhibit Russian-German cooperation on Russian gas import to Germany and other states and increase the supplies of American liquefied gas to the Trimarium Member States?[140] The decisive support of President D. Trump for Trimarium, including his participation in the second Trimarium summit in Warsaw (6—7 July 2017) and his encouragement to buy American gas, seems to make the above questions justified.

It also seems justified to ask: Does the promotion of Trimarium by Polish diplomacy match the American policy of treating Poland instrumentally as a wedge supposed to prevent closer cooperation between Germany and Russia? George Friedman, one of the most influential American political scientists, writes that one of the main objectives of the American foreign policy is the prevention of integration between the Russian resource base and workforce with the European technological progress, first and foremost the German progress. The USA's objective in Eurasia, defined as Russia and the European Peninsula, is to prevent one force (or coalition of forces) from dominating in that area. As G. Friedman argues, Russia integrated with Europe could form a superpower which might equal or even outclass America. Consequently, the USA should do everything in its power to prevent the German-Russian cooperation from becoming closer. The Intermarium states are indispensable for such American policy, and the biggest among them is Poland; in addition, its strategic location is the most advantageous one. The USA's relations with Poland can play two roles: prevent or weaken the German-Russian alliance or, if this fails, create a counterbalance for that alliance. The maintenance of a strong wedge in the form of Poland, driven in between Germany and Russia, is one of America's vital interests.[141] In the American strategy, Poland is supposed to play — and has played for ages — one of the main roles in preventing the rapprochement between Russia and Germany as it could threaten America's hegemony in future decades.[142]

I reckon it was due to the abovementioned actual yet not declared reasons for Trimarium establishment that Germany declared its willingness to become a Trimarium partner at the end of July 2018 even though it had previously been sceptical about the entire idea. At the invitation of the Romanian hosts, Ger-

[140] A. Bieńczyk-Missala: *Od Międzymorza do Trójmorza — meandry polityki zagranicznej Polski w Europie Środkowej.* "Stosunki Międzynarodowe — International Relations" 2018, nr 1.

[141] G. Friedman: *Następna dekada. Gdzie byliśmy i dokąd zmierzamy.* Przeł. M. Wyrwas-Wiśniewska. Kraków 2012, p. 165—171.

[142] Ibidem, p. 205.

man Minister of Foreign Affairs Heiko Maas participated in the third Trimarium summit held in Bucharest (17—18 September 2018). It was even suggested that Germany was interested in obtaining Trimarium membership. This raises the following question: Does Germany's participation in Trimarium really tally with the idea behind the establishment of that project and will it influence the effectiveness of accomplishing its objectives as expected by Polish diplomacy?

In Poland's relations with Russia

The Russian-Ukrainian conflict, which has lasted in eastern Ukraine since April 2014 and includes civil war elements, significantly worsened Poland's geopolitical situation. As a result, the sense of a hazard perceived by a significant part of Polish society considerably increased.[143] When listening to numerous Polish politicians, journalists and analysts of international affairs, especially in 2014, one was able to conclude that the Russian army was preparing for an invasion of Poland.[144] The National Security Strategy of the Republic of Poland signed by the President of Poland on 5 November 2014 included provisions which stated that, as a result of the crisis and then conflict in eastern Ukraine, including Crimea incorporation by Russia and the latter's support for the pro-Russian separatists in eastern Ukraine, Russia was the main military hazard to Poland's security.[145] At that time, the notion of a war with Russia was making headlines in Poland as numerous Polish politicians, journalists, service people and international affairs analysts seemed to be striving after a confrontation or even war with Russia. This does not mean, however, that Russia threatened Poland with a military invasion in the years 2014—2018. Russian authorities did not intend to commence any armed conflict with Poland. In one of his interviews, General Mieczysław Bieniek said, "An armed conflict between Russia and Poland is presently excluded. If someone mentions it, all I can say is they do not have their feet firmly fixed on the ground."[146] Stanisław Bieleń writes that the thesis spread by Polish politicians and generals responsible for the security strategy, according to which "the enemy was at the door" and one had to get

[143] In a survey conducted by CBOS (Public Opinion Research Centre) on 3—9 April 2014, 47% of respondents reckoned that Poland's independence was threatened in the context of the events in Ukraine. 29% of respondents believed that Poland was threatened with a Russian military attack. *Polacy o bezpieczeństwie narodowym i NATO Komunikat z badań CBOS.* Oprac. K. Kowalczyk. Warszawa 2014, nr 48 — www.cbos.pl/SPISKOM.POL/2014K_048PDF (accessed: 10.08.2014).

[144] See more in M. Stolarczyk: *Rosja w polityce zagranicznej Polski…*

[145] *The National Security Strategy of the Republic of Poland.* Warsaw 2014, p. 20 — www.mon.gov.pl (accessed: 10.12.2014).

[146] *Pierwszy atak będzie w cyberprzestrzeni. Rozmowa z gen. Mieczysławem Bieńkiem.* "Przegląd", 20—26 October 2014.

ready for a war, did not stem from an analysis of the real strategic situation, but from an anti-Russian obsession and the disastrous consequences of the involvement in Ukraine's internal affairs.[147] The atmosphere of fear of a Russian invasion, created by Polish ruling groups and the media that supported them, favoured the militarisation of Polish politics and a significant increase of the expenditure on armaments (2.5% of GDP till 2024).

In 2014 and subsequent years, the relations between Poland and Russia on the highest level were frozen. In the years 2014—2019, subsequent Polish governments were in favour of maintaining the economic sanctions imposed on Russia and the political isolation of Russian authorities. Russia ended its political isolation relatively fast and in recent years its President V. Putin met Presidents of the USA (Barack Obama and Donald Trump) and France (Emmanuel Macron), FRG Chancellor Angela Merkel as well as many other presidents and Prime Ministers of other NATO and EU Member States. Polish diplomacy occasionally declared the will to improve the relations with Russia, e.g. during the exposés delivered by subsequent Polish Ministers of Foreign Affairs,[148] but it did not demonstrate any significant practical interest in that improvement. In his exposé delivered in the Polish parliament on 9 February 2017, Polish Minister of Foreign Affairs Witold Waszczykowski underlined that Polish policy toward the Russian Federation was conditioned by Russia's aggressive actions in Eastern Europe. Still, he claimed that the government saw the need for conducting a dialogue with Russia as it was Poland's neighbour.[149] The next Polish Minister of Foreign Affairs Jacek Czaputowicz delivered his exposé in the Polish parliament on 21 March 2018. On the one hand, he stressed that Russia's policy was a hazard to the building of Poland's autonomous position in international relations. On the other hand, he stated that pragmatic relations with the Russian Federation were in Poland's and Europe's interests. He said that the government viewed the maintenance of a political dialogue with Russia as indispensable. However, he

[147] *Żeby Polska nie przegapiła szansy na dialog z Rosją — nld,1548975,nPack,3* — http://fakty.interia.pl/tylko-u-nas/news-prof-stanislaw-bielen-zeby-polska-nie-przegapila-szansy-na-d, (accessed: 10.11.2014).

[148] The *exposé* delivered in the Polish parliament on 29 January 2016 by Polish Minister of Foreign Affairs Witold Waszczykowski featured i.a. a statement that pragmatic and matter-of-fact relations with the Russian Federation were in Poland's and Europe's interests. He declared his will to cooperate with Russia, in particular on such issues as: reliable collaboration on investigating the Smolensk disaster causes; returning the wreck of the Polish President's plane; and full declassification of the archives recording the Stalinist regime crimes the victims of which were Polish officers. *Information on the Polish foreign policy tasks in 2016, presented by Polish Minister of Foreign Affairs Witold Waszczykowski in the Polish parliament on 29 January 2016* — msz.gov.pl (accessed: 3.02.2016).

[149] *Minister Witold Waszczykowski o priorytetach polskiej dyplomacji w 2017 roku* — http://www.msz.gov.pl/pl/p/msz_pl/aktualnosci/minister_witold_waszczykowski_o_priorytetach_polskiej_dyplomacji_w_2017_roku (accessed: 10.02.2017).

simultaneously asserted, "Ignoring Russia's present aggressive policy toward the West must not constitute the essence of that dialogue."[150] Despite those declarations, neither Poland nor Russia showed any political will to improve the mutual relations. Representatives of Russian authorities highlighted that the crisis in the Polish-Russian relations should be resolved by Poland because it was not Russia that discontinued the contacts.[151]

The attitude toward Russia demonstrated by Polish authorities in the years 2014—2019 was one of the most uncompromising among the EU and NATO Member States. At the same time, politicians from other countries, first and foremost Germany, conducted a constant albeit difficult dialogue with Russia. The relevant discussion both in Poland and Russia was dominated by unfavourable comments on the other party and blaming each other for the crisis of the Polish-Russian political relations. Poland stressed first and foremost Russia's breach of the fundamental provisions of international law *via* Crimea incorporation and supporting the pro-Russian separatists in eastern Ukraine as well as demanded returning the remnants of the Polish President's plane which had crashed near Smolensk on 10 April 2010. In turn, a matter very important to Russia in its dispute with Poland was the disassembly of Polish monuments to Soviet soldiers and officers, approx. 600 thousands of which had died in the territory of contemporary Poland in the fights with the German army. Russia accused Polish authorities of escalating "a war with the monuments" commemorating the Soviet soldiers who had laid down their lives to save the Polish state and nation from Nazism, lack of a historical memory and breaching the Polish-Russian agreement of 22 February 1994 on graves and memorial sites of victims of wars and repressions. Poland argued that the Polish-Russian memorial agreement was observed because the Polish state took care of cemeteries and burial sites, while decisions on monuments were made by local authorities. An argument widely acknowledged in Poland was that the monuments commemorating the Red Army soldiers who had died in the territory of Poland were not homage to those who had fallen but a symbol of dependence on the Soviet Empire.

In the context of the conflict in eastern Ukraine, both scientific studies and political journalism texts published in Poland in recent years contained opinions that it was necessary to determine new rules of the policy toward Russia. However, the exact nature of those new rules was perceived in a greatly diversified manner. For some (a vast majority), it meant a significant toughening of Polish policy toward Russia. For others (a definite minority), it meant deriving essential conclusions from the previous failures of the Polish Eastern policy and

[150] *Minister Jacek Czaputowicz o priorytetach polskiej dyplomacji w 2018 roku* — http://www.msz.gov.pl/pl/aktualnosci/minister_jacek_czaputowicz_o_priorytetach_polskiej_dyplomacji_w_2018_roku (accessed: 25.04.2018).

[151] *Zielonych ludzików w Polsce nie będzie. Wywiad z ambasadorem Rosji w Polsce, Siergiejem Andriejewem*. "Rzeczpospolita", 26 November 2015.

a considerable reorganisation of its hierarchy of values to make it more realistic in comparison with the one pursued till the end of 2015. It is true that the PiS governments slightly modified Poland's previous Eastern policy, mainly in the historical area and first of all toward Ukraine. They also distanced themselves from Eastern Partnership — a flagship project pursued by the PO party in the Eastern policy.

Concerning the conflict in eastern Ukraine, one of the most important dilemmas in the Polish Eastern policy, including the policy toward Russia, is included in the search for an answer to the following question: Should the Polish Eastern policy to date be assessed as a success or failure? Depending on the answer, that policy should be continued, modified (to what extent?) or thoroughly changed. Despite the stance that the Polish Eastern policy after 1989 should be assessed positively, which prevails in the Polish political elite and the Polish media, this matter raises a number of doubts concerning i.a. excessive involvement of Polish politicians in Ukraine's internal affairs, their uncritical support for the post-Maidan authorities, lack of Polish (governmental) proposals regarding the manners of de-escalating the Ukrainian conflict using diplomatic instead of military means and the critical stance of Polish authorities on the Minsk I and Minsk II agreements.

An extremely important aspect of this assessment seems the fact that the conflict in eastern Ukraine falsified Poland's role as the EU's main expert on the matters of the post-Soviet region. Throughout many years, Poland had aspired to the role of Ukraine's chief defender in the EU, but it lost that position to Germany during the Ukrainian conflict. The FRG government assumed the main responsibility for ending that conflict and stabilising the situation in Eastern Europe in the name of Germany and the EU. In subsequent years after 2013, Ukrainian politicians were gradually becoming less interested in having Poland as Ukraine's defender in the EU. They simultaneously made effort to have Germany play that role. One should mention here that the Polish-Ukrainian relations deteriorated significantly after 2015, especially due to the different assessments by Poland and Ukraine of the Volhynia genocide committed by Ukrainian Insurgent Army (UPA) troops during World War II and the progressive glorification of UPA's actions by Ukrainian authorities (the official heroisation of the Bandera movement).[152] One direct consequence of the change of authorities in Kiev in 2014 was the strengthening of nationalist ideas in Ukrainian society, first of all in western Ukraine. In the years 2017—2018, the Polish-Ukrainian relations reached their worst condition since 1991. PiS politicians used to say that Ukraine would not join the EU with Bandera. Consequently, Polish political journalists

[152] Volodymyr Viatrovych, Director of the Ukrainian Institute of National Remembrance, argued that the crimes during World War II had been symmetrical on the Ukrainian and Polish sides. *Zbrodnie były symetryczne.* "Rzeczpospolita", 14 July 2016.

began to remark that Poland's role in the Ukrainian foreign policy underwent a great revolution — from a defender to a prosecutor.

The implementation of Eastern Partnership proved rather ineffective as well.[153] It was justified to state that the Polish government's tactics, which combined the normalisation of the relations with Russia with a simultaneous effort to enhance the EU's influence in the post-Soviet region *via* Eastern Partnership, ended in failure.[154] Consequently, Eastern Partnership, which was one of the most important initiatives undertaken by Polish diplomacy in the post-Cold War period and in which Ukraine was supposed to play the leading role, did not produce the desired results. Jędrzej Bielecki writes, "Poland's idea of a conflict-free integration of Ukraine with the EU fell flat."[155] The idea of integrating Ukraine with the EU while simultaneously "pushing" Russia away toward Asia did not have the anticipated effect. The same author accurately remarks that the Polish Eastern policy has to face a new serious dilemma expressed in the following question: Should Poland join the German and French effort to normalise the relations with Russia at the cost of giving up on Ukraine's dreams of integration with the EU or should it stick to the present vision, which is courageous but not too realistic[156]? Other strategic dilemmas of Polish policy toward Russia, which I have already described in greater detail in another work, are contained in the search for the answers to the following questions: Is Russia an enemy, a rival or just a difficult partner in the Polish security policy? With regard to Polish interests, should Polish diplomacy become involved in Russia's Europeanisation or international isolation? Should Poland choose Russia or Ukraine as the main partner in the post-Soviet region[157]?

Another very important dilemma in the Polish Eastern policy and beyond is contained in the following question: Can the Polish Eastern policy be effective without relevant cooperation with Germany? Robert Foks justifiably argues that, if Poland wishes to cooperate more closely with Germany on the shaping of the EU's Eastern policy, the decision makers of the Polish foreign policy will have to resume the process of normalising Poland's relations with Russia and reorganise the hierarchy of values in the Polish policy toward Ukraine conducted to date.[158] An alternative solution to a significantly changed Polish Eastern policy, founded on the Polish-German cooperation to build partner-

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[153] R. Foks: *Kluczowe wyzwania i uwarunkowania dla polskiej polityki wschodniej po zmianie władzy w Polsce w 2015 r.* "Dyplomacja i Bezpieczeństwo" 2016, nr 1, p. 136.

[154] R. Foks: *Polska i Niemcy a polityka wschodnia Unii Europejskiej.* "Dyplomacja i Bezpieczeństwo" 2014, nr 1, p. 123.

[155] J. Bielecki: *Potrzebne jest nowe otwarcie.* "Rzeczpospolita", 2 January 2015.

[156] Ibidem.

[157] See more in M. Stolarczyk: *Rosja w polityce zagranicznej Polski…*, p. 401 and subs. pages.

[158] R. Foks: *Polska i Niemcy a polityka wschodnia Unii Europejskiej...*, p. 132—133.

ship-based and non-confrontational relations with Russia, was a proposal to develop the Polish-German cooperation on the Eastern policy *via* closer collaboration of both countries with Ukraine and "weakening the potential for aggression" demonstrated by Russia.[159] The advocates of that stance argued that Germany should be the leader in the fight against Putin and the strategy of stopping Russian imperialism, while Poland ought to play an important role in that strategy as the most powerful country in the region.[160] However, the hope that Germany would conduct a confrontational policy toward Russia significantly differed from the relevant tendencies appearing in German *Ostpolitik* in recent years. The White Book, a new conception of national security adopted in July 2016, contained i.a. a statement that, unless the direction of actions was completely changed, Russia would constitute a challenge to the security in Europe in the oncoming years. At the same time, Europe and Russia are connected *via* a broad range of mutual interests and relations. As the EU's biggest neighbour and a permanent member of the UN Security Council, Russia bears special responsibility, both regionally and globally, for tackling international challenges and crises. "In the future, one will not achieve sustainable security or progress in and for Europe without Russia, either. In this sense, it is important to treat Russia as a specific mix of collective responsibility and building a protection, while creating the premises for cooperative security and industry collaboration."[161] Still, Russia's actions, especially those concerning Ukraine, do require a double approach based on mutual deterrence and defensive capacity as well as readiness for dialogue.[162] Even though the FRG modified its policy toward Germany after 2013, its main assumptions from the previous period were sustained. They include: Germany's effort to treat Russia as a partner, not an enemy; maintaining the focus on cooperation instead of confrontation with Russia; perception of Russia by FRG authorities as "the main player" in the post-Soviet region; treating Russia as the main subject in the security policy and economy of the CIS area; highlighting by the FRG ruling groups of the will to act as a mediator and agent between Russia and the West.[163] The increase of controversy in the German-American relations during the term of office served by President D. Trump may be an important determinant making the German-Russian cooperation closer.

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[159] M.A. Cichocki, O. Osica: *Nowa polsko-niemiecka agenda. Jak przekuć różnice w podstawę wspólnych interesów?* "Dialog" 2015, nr 1, p. 57.

[160] M. Czech: *Nasze miejsce w grze o Ukrainę.* "Gazeta Wyborcza", 6 March 2015.

[161] *Das Weissbuch zur Sicherheitspolitik und der Zukunft der Bundeshwer,* Berlin 2016, p. 32 — https://www.bmvg.de/portal/a/bmvg/!ut/p/c4/04_SB8K8xLLM9MSSzPy8xBz9CP315EyrpHK9pNyydL3y1Mzi4qTS5A (accessed: 12.11.2016).

[162] Ibidem.

[163] See more in M. Stolarczyk: *Bezpieczeństwo Niemiec w kontekście konfliktu na wschodzie Ukrainy.* "Bezpieczeństwo. Teoria i Praktyka" 2017, nr. 1, p. 83—97.

Given the abovementioned differences between the Eastern policies of Poland and Germany, it seems justified to infer that there is little possibility of making the cooperation of the two countries closer in the scope of their policies toward Russia and Ukraine in the oncoming years. There are no suitable grounds for claiming that the Eastern policies of Poland or Germany, including their policies toward Russia and Ukraine, will undergo fundamental changes. Only such thorough changes in the policy of either country would enable a considerable rapprochement of stances and enable both governments to cooperate on a wide scale in this scope. It is rather unrealistic to assume that the present Polish Eastern policy may soon undergo a thorough reorganisation of its hierarchy of values. On the contrary, the Ukrainian crisis and conflict strengthened the current assumptions of Poland's policy toward Russia, at least in the short term. Neither the Polish political elites and opinion-forming circles nor the majority of Polish society created a suitable political atmosphere or showed their will to make the cooperation with Russia closer instead of striving after a confrontation.[164] An example of extreme thinking in this aspect is the writing by Andrzej Talaga published in the "Rzeczpospolita" daily paper, where he justifies a thesis that the worse the Polish—Russian relations the better for Poland's security.[165] Moreover, the decision makers of the Polish foreign policy showed no political will to cooperate more closely with Germany on the shaping of the EU's Eastern policy based on the normalisation of the relations with Russia, including the acceptance of Germany's two-way policy toward Russia (deterrence and dialogue).[166] The decision makers of the Polish foreign policy had no idea

[164] In 2018, the opinions that an improvement of the relations with Russia was justified, expressed by politicians and journalists such as Kornel Morawiecki or Rafał Ziemkiewicz, were isolated voices.

[165] According to Andrzej Talaga, if Poland's relations with Russia are normalised, it will become difficult to keep Polish society convinced that the expenditure on armaments should be regularly increased. The reason for the stationing of a NATO battalion and an American brigade in the territory of Poland will cease to be valid. The premises for intensifying the coordination of the alliance's armies *via* training ground exercises will no longer exist. There will also be no reason for Western European states to increase their defence budgets to the level of 2% of GDP. A. Talaga: *Reset z Rosją to duże zagrożenie.* "Rzeczpospolita", 30—31 May 2018. In A. Talaga's opinion, Russia, whether authoritarian or liberal, will never be on friendly terms with Poland because geopolitics dooms the two countries to coexist in a conflict. A. Talaga: *Wieczny konflikt z Rosją.* "Rzeczpospolita", 9 May 2018; A. Talaga: *Lepiej z Banderą niż z Moskwą.* "Rzeczpospolita", 23 August 2017.

[166] See R. Foks: *Kluczowe wyzwania i uwarunkowania dla polskiej polityki wschodniej*.... Katarzyna Pełczyńska-Nałęcz, a former ambassador of Poland in Russia, mentions seven myths paralysing Polish policy toward Russia in her text written near the end of 2016. They include i.a. the following ones: Russia is bad (aggressive, hypocritical, non-democratic), so one should not conduct talks with it; every dialogue with Russia is doomed to failure; conducting a dialogue with Russia equals a betrayal of Polish interests; freezing the Warsaw—Moscow contacts makes it difficult for the West to pursue its policy of improving the relations

for arranging the relations with Russia. A considerable weakening of Poland's position in the EU in recent years as well as the large number of disputable issues present in the Polish-Russian relations, including the confrontational policy of Polish authorities toward Russia, prevented the Russian ruling groups from becoming interested in the normalisation of their relations with Poland.

It is also rather unlikely that the cooperation between Poland and Germany on the shaping of their policy toward Russia will become closer due to a fundamental change of Germany's present Eastern policy making it similar to the main assumptions of Poland's Eastern policy. Thus far, the policy implemented by German authorities offers no grounds for inferring that Germany is striving for a thorough change of its present policy toward Russia from cooperative to confrontational.[167] One should answer the following question: What would be the consequences (also for Poland) of a fundamental change of Germany's present policy toward the post-Soviet region? It is highly probable that the essence of such change would be closer German-Ukrainian cooperation and treatment of Ukraine as a strategic partner in Germany's Eastern policy. Given the increasing nationalist tendencies in Ukraine, including anti-Polish trends, would closer German-Ukrainian cooperation be favourable to Poland?

Conclusion

Despite the very important changes taking place in the post-Cold War period in Poland's immediate and further international environment, including the influence of globalisation and increasing interdependencies, the geopolitical factor still plays a truly significant role in the shaping of Polish foreign policy. Its essence comes down to Poland's geopolitical location between Germany (reunified since 1990) and the Russian Federation, the strongest organism in the area of former USSR. However, Tomasz Orłowski justifiably argues that the geopolitical factor, whether for Poland or other countries, is not an independent prime mover; it does not entail geopolitical determinism which automatically eliminates the possibility of influencing Poland's situation by its authorities.[168]

with Russia; Poland's uncompromising policy toward Russia defends the interests of Ukraine and Belarus. *Dyplomacja romantyczna. Oto siedem mitów, które paraliżują polską politykę wobec Rosji* — http://www.polityka.pl/tygodnikpolityka/swiat/1681052,2,stosunki-polska-rosja-obalamy-7-mitow.read (accessed: 26.03.2017).

[167] See more in M. Stolarczyk: *Możliwości współdziałania Polski i Niemiec w zakresie ich polityki wobec Rosji i Ukrainy.* "Krakowskie Studia Międzynarodowe" 2016, nr 2, p. 123—149.

[168] T. Orłowski: *Geopolityka polska.* W: C. Jean: *Geopolityka*…, p. 362.

Poland's geopolitical location between Russia and Germany does not doom Polish relations with the two countries to a confrontational nature for historical reasons. In the post-Cold War period, that concerned first and foremost the Polish-Russian relations and a thesis highlighted in Poland according to which the hazard posed by Russia to Poland was timeless. The geopolitical factor in its traditional sense shaped Poland's policy toward Russia to a much larger extent than it did the policy toward Germany. The significance of the German problem diminished considerably in the Polish foreign policy in the post-Cold War period, while the significance of the Russian problem remained considerable. As demonstrated by the Polish-German relations in the last 30 years, the geopolitical location does not determine eternal hostility between countries, the strength of Poland's autonomous position in the international arena or the effectiveness of the Polish foreign policy in Poland's relations with its two biggest neighbours. The geopolitical location does not determine eternal enemies or eternal friends because one can derive various conceptions, programmes and objectives of the foreign policy from the same geopolitical location of Poland. The key role in that period, beside the German and Russian policies toward Poland, was played by subsequent decision makers of the Polish foreign and security policies and their perception of international reality, including the perception of challenges and hazards to Poland's interests posed by its two biggest neighbours. In the new international reality, where Poland is an EU and NATO Member State, it should make effort to maintain good relations not only with Germany, but also with Russia. For those reasons, Adam Daniel Rotfeld reckons that "the eternal Polish dilemma whether security should be shaped together with Russia against Germany, together with Germany against Russia or via balancing between Russia and Germany like in the interwar period has ceased to exist."[169] Still, the research on the Polish foreign policy shows that the stance according to which Poland's security should be built together with Germany against Russia was widely acknowledged in Polish society in the discussed period.

Given the degree of convergence and divergence of Polish interests with the German and Russian ones, there is little probability that Poland's relations with Russia and Germany will become better than the German-Russian relations. It is slightly more likely that Poland's relations with Russia and Germany in the long term will reach a similar level to that of the German-Russian relations. This also provokes the following question: How long will it take the Polish and Russian ruling groups to free the current Polish-Russian relations "from their enslavement to history and break the determinism of hostility" the way it has largely been accomplished in the Polish-German relations? I reckon that, despite the numerous areas of divergent interests in the Polish-Russian relations, the long-term Polish interests pursued in the post-Soviet region require broadening the scope

[169] A.D. Rotfeld: *W poszukiwaniu strategii*…, p. 287.

of cooperation with Russia as well as departing from the confrontational policy and perceiving Russia as an eternal, timeless enemy. The excessive emotionality typical of the Polish Eastern policy should be replaced with a policy of rationalism, including striving for Russia's gradual Europeanisation and Poland's simultaneous actions aimed at the Westernisation of Ukraine and Belarus (Westernisation of Eastern Europe together with Russia, not against Russia). One should realise that only this way will it become possible to reduce the tension caused by the geopolitical competition for the influence on Ukraine.

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Mieczysław Stolarczyk, prof. dr hab., an academic in the Institute of Political Science and Journalism (University of Silesia, Katowice). He has written four monographs and approx. 140 papers published in academic journals and joint publications. His research interests concern first and foremost the theory of international relations, the foreign policy of FRG and Polish-German relations, the foreign policy of Russia and Polish-Russian relations in the post-Cold War period, the political aspects of European integration as well as the evolution of the global and European international system in the post-Cold War period.

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The influence of weapons of mass destruction on international security in the second decade of the 21st century

Wpływ broni masowego rażenia na bezpieczeństwo międzynarodowe w II dekadzie XXI wieku

Włodzimierz Wątor*

Abstract

The article outlines reasons for the significant increase of the hazard posed by weapons of mass destruction in the current decade. Despite the international community's efforts made throughout the years, it has not been possible to eliminate them, significantly lower their arsenal or prevent their building or transfer. What has increased is the importance of weapons of mass destruction, especially nuclear ones, as a force factor in international relations. This tendency will probably continue in the foreseeable future. Therefore, the article focuses on explaining the mechanisms of this process and its connections with numerous events and facts influencing international security. Special significance

Abstrakt

W artykule przedstawiono przyczyny, dla których w ciągu obecnej dekady nastąpił znaczący wzrost zagrożenia bronią masowego rażenia. Pomimo wieloletnich wysiłków społeczności międzynarodowej broni tej nie udało się wyeliminować ani znacząco ograniczyć jej arsenałów czy też wykluczyć możliwość jej budowy lub transferu. Wzrosło natomiast znaczenie broni masowego rażenia, zwłaszcza jądrowej, jako czynnika siły w stosunkach międzynarodowych. Tendencja ta prawdopodobnie utrzyma się w dającej się przewidzieć przyszłości. Dlatego też podczas opracowywania artykułu skoncentrowano się na wyjaśnieniu mechanizmów tego procesu i jego powiązań z wieloma innymi wyda-

* Akademia Sztuki Wojennej (Centrum Szkolenia Obrony Przed Bronią Masowego Rażenia w SZ RP); (e-mail: wwm_wator@wp.pl); https://orcid.org/0000-0002-9402-5350.

is ascribed to a precise estimation of the risk posed by weapons of mass destruction and determination of its hierarchy. Moreover, the article presents the forms and methods of the activities undertaken by countries and international organisations regarding the prevention of proliferation (*via* disarmament treaties and informal forums) and assesses their effectiveness.

Key words: weapon of mass destruction, proliferation, nuclear deterrence, disarmament

rzeniami i faktami mającymi wpływ na bezpieczeństwo międzynarodowe. Należy tu podkreślić szczególne znaczenie, jakie przypisano roli precyzyjnego szacowania ryzyka stwarzanego przez broń masowego rażenia i określeniu jego hierarchii. Ponadto przedstawiono formy i metody działania państw i organizacji międzynarodowych w zakresie zapobiegania proliferacji (w ramach traktatów rozbrojeniowych i forów nieformalnych) oraz dokonano oceny ich efektywności.

Słowa kluczowe: broń masowego rażenia, proliferacja, odstraszanie nuklearne, rozbrojenie

Introduction

Weapons of mass destruction (WMD) is a conventional name of a set comprising different categories and subcategories of so-called unconventional weapons.[1] Due to the highly destructive impact on people, infrastructure and the environment, it constitutes a significant hazard to regional and global security. This is confirmed by various examples of using the individual WMD types in international and internal armed conflicts as well as terrorist attacks.

When one limits the article scope to the present decade of the 21st century, about a dozen of such incidents have been recorded in the world. The most spectacular of them were reported on by mass media. However, little is known about the remaining ones as they caused smaller losses or took place in inaccessible zones, e.g. due to ongoing fights.

The chemical attacks of 2013—2018 in Syria prove that reconnaissance[2] and identification[3] of the used toxic substances is insufficient for the purposes of

[1] One of the first definitions of weapons of mass destruction was published in 1948 in a resolution by the United Nations Commission on Conventional Armaments. It states that WMD includes "atomic explosive weapons, radioactive material weapons [and] certain 'lethal' chemical and biological weapons".

[2] Contamination reconnaissance — an action aimed at determining the presence of radioactive substances or biological or chemical agents as well as supplementing and conforming the preliminary dispatches. See Regulation of the Council of Ministers of 7 January 2013 on contamination detection and announcement as well as competence of authorities in these matters (§2, par. 10), Dz.U. of 2013, item 96.

[3] Contamination identification — actions aimed at determining the asset type used during an attack (incident). It includes sampling of contaminated materials as well as transport and a laboratory analysis of the samples. The evidence analysis mentioned in the text

evidence proceedings, which hinders unambiguous identification of perpetrators. This is caused first and foremost by the fact that every stage of the WMD acquisition and development programmes as well as the planning and preparation of attacks is a strictly guarded secret.

The wide series of the assets enabling operational use of weapons of mass destruction (rocket missiles and artillery, aircraft, submarines) is continuously modernised, i.a. concerning their range, throw-weight and CEP.[4]

The indispensable high level of technological advancement makes the WMD development and modernisation programmes very costly. Nevertheless, according to Kenneth Waltz's theory, selected countries attempt to acquire WMD, especially nuclear weapons, in order to counterbalance their position in relation to a potential enemy which already owns such weapons. Another significant fact is participation in the international deterrence mechanisms and building a much more effective military potential as an alternative to long-long-lasting and increasingly expensive conventional armament.

In such situation, the diversified forms of combating the proliferation[5] of weapons of mass destruction, especially those concerning armament control and so-called non-proliferation initiatives, constitute one of the priority tasks for individual countries, groups of countries and international organisations. Due to the heterogeneous nature of WMD programmes as well as the dynamism of the hard-to-predict phenomena and processes which accompany them, those actions are largely uncertain.[6] This makes one ask a number of ontological questions concerning the risk posed by WMD and its proliferation, which is expressed as a product of the probability of an attack (incident) and its health-related, political, sociological, economic and environmental effects.[7] Consequently, it is

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is conducted by certified laboratories using scientifically validated analytical methods. See more in: *Obrona przed bronią masowego rażenia w operacjach połączonych DD/3.8(A),* Bydgoszcz 2013, p. 34—35.

[4] Throw-weight — a concept introduced by the Strategic Arms Limitation Treaty (SALT I) of 26 May 1972. It enables the classification of ballistic missiles. It denotes the maximum weight a missile can carry including the weight of all of its elements, e.g. the navigation and guidance systems, excluding the weight of engines and fuel. CEP (circular error probable) — a coefficient enabling one to calculate the probability of target destruction. It is defined as the radius of the circle within which 50% of launched rocket missiles will end their flight.

[5] Proliferation (Latin: *proles* — progeny, *fero* — I carry) — a term taken from biological sciences which means growth and multiplication. Its Polish equivalents are "spreading" and "dissemination".

[6] Uncertainty in decision theory — a situation where specific decisions may cause various effects depending on which possible state of affairs actually takes place, but no occurrence probability is known. Source: *Encyklopedia Zarządzania* (an online management encyclopaedia). Cf. Z. Redziak: *Niepewność w podejmowaniu decyzji.* "Zeszyty Naukowe AON" 2013, nr 2(91), p. 102.

[7] J. Wolanin: *Zarys teorii bezpieczeństwa obywateli. Ochrona ludności na czas pokoju*. Warsaw 2005, p. 26.

natural to search for effective methods of risk analysis[8] and assessment which translate into projects aiming at its reduction. Those are usually actions in the political, economic, legal or military domain.

The inspiration to write this article is the noticeable need for the information which enables one to assess the risk posed by WMD as well as for the knowledge which facilitates the forecasting of its changes in the future, with particular reference to the hazard-reducing actions undertaken by countries and specialised departments of international organisations. An additional aim of the article is to present WMD implications for international security and the contemporary political relations. The aim defined this way has resulted in the formulation of research problems as the following questions:

— What is the hierarchy of the risk posed by WMD types and can its acceptability level be defined?
— What is the actual influence of WMD and its delivery programmes on international security and political relations[9] in the second decade of the 21st century?
— What actions do countries and international organisations take to limit WMD proliferation and what is the effectiveness of those actions?

Due to the limited number of publicly available sources (WMD data are usually classified as top secret), the adopted research methodology assumes an analysis and interpretation of all the available information sources, which are often fragmentary. A helpful factor in this situation is the author's long-term experience in analytical work aimed at the preparation of assessments and forecasts concerning WMD hazard (for Poland and various regions of the world) as well as practical solutions related to protection against the destructive impact of WMD. A significant research mechanism referred to in this article is the analysis of selected cases of WMD use and modelling the effects of hypothetical incidents with decision-support software.

[8] Risk analysis — determination of a scenario according to which the risk may come true, i.e. a hazard will turn into a disruption, an incident or a disaster. This is influenced by the emergence mechanism of a given hazard, the susceptibility to that hazard in local conditions and the ability to react to the effects. A. Kosieradzka, J. Zawiła-Niedźwiecki: *Zaawansowana metodyka oceny ryzyka w publicznym zarządzaniu kryzysowym.* Kraków—Legionowo 2016, p. 42.

[9] "International political relations are interactions between entities the actions of which go beyond their own boundaries and take place in a polyarchic, polycentric and decentralised environment… International political relations are relationships between independent and non-independent entities in which politics plays the superior role". See more in: P. Ostaszewski*: Międzynarodowe stosunki polityczne. Zarys wykładów.* Warszawa 2008, p. 12.

WMD risk assessment

Weapons of mass destruction include separate categories of combat assets; the differences between them concern the technical issues regarding their manufacturing and possible use as well as the methods of preventing their use and mitigating the effects.

One of the important threads discussed in this article is consideration for the stances of the countries which already possess or strive to acquire WMD arsenals. These are expressed in their military doctrines. Therefore, it is necessary to divide WMD risk into separate categories (risk segmentation) corresponding to the adopted division into types within that set (chemical, biological, radiological and nuclear weapon). This assumption defines the pivot of the research deliberations and influences the article structure.

The risk analysis and hierarchisation model chosen as optimal for the purposes of this section is the model by FEMA (US Federal Emergency Management Agency). It utilises four partial meters: incident frequency in the past, susceptibility defining the population number and property value exposed to the hazard, the maximum hazard together with the surface area influenced by the effects (including the scenario of the most unfavourable incident) and incident probability in the whole year. Each of those meters receives a weight and is assessed using points from 0 to 10. The hazard degree is a product of the weight and the points. The calculation results obtained using this method reflect the degree of the current hazard caused by various WMD types. They are presented in the diagram below.

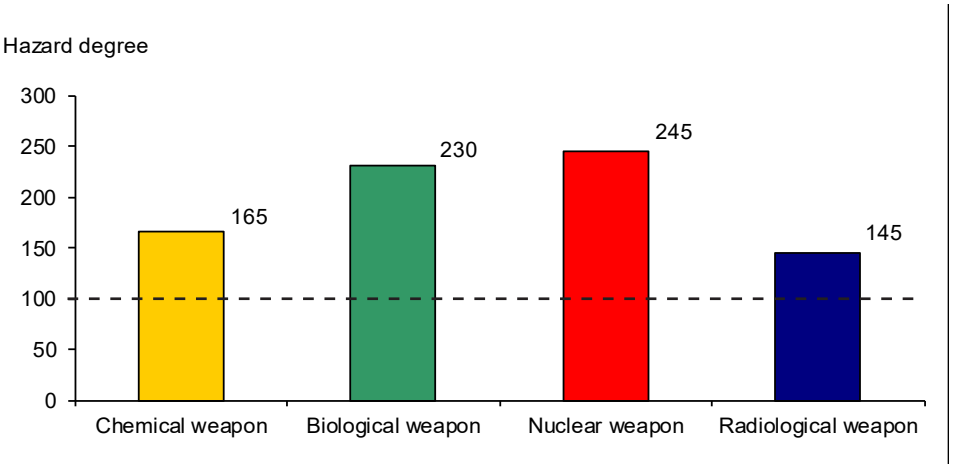

Fig. 1. The WMD hazard degree in the second decade of the 21st century according to the FEMA model. Developed by the author.

First, the presented distribution of the aggregated hazard value confirms the necessity of analysing each WMD type separately; second, it inspires one to search for detailed justifications for the determined risk hierarchy. This simultaneously constitutes the starting point for subsequent deliberations. The data used for the calculations are relative,[10] so the results are approximate and are used first and foremost to define the structure and intensity of the individual hazards in the analysed set. Still, even these approximate results show that all WMD types are sources of risk which exceeds so-called acceptable (tolerable)[11] level (100 in the FEMA model) by 0.5 times for radiological weapon and up to 1.5 times for nuclear weapon.

The risk acceptability concept is related to the ALARP (as low as reasonably possible) principle, according to which the risk level should be kept as low as possible and if the acceptability limit is exceeded, it becomes necessary to undertake all the risk-reducing actions regardless of their costs. Such approach allows one to assess the actions taken by the international community concerning WMD non-proliferation in a much wider context. This justifies the "deep defence" principle,[12] according to which no security measure is perfect, so actions must be diversified. It is the specific situation that influences the decision to apply political, diplomatic, legal, economic, information or military measures. It must also be stressed that their form and scope is different for each WMD type.

The apocalyptic nature of nuclear weapon

The discovery of nuclear weapon has undoubtedly had a significant impact on the history of the world. Used twice at wars and checked during nuclear tests,[13] it still terrifies the human due to the unimaginable force of its destruction

[10] Relative numbers are quotients of absolute numbers describing interrelated phenomena. Relative numbers are widely used in statistical analysis, with special significance ascribed to those which characterise the intensity or structure of phenomena. See: T. Michalski: *Statystyka. Podręcznik.* Warszawa 2004, p. 87.

[11] Risk acceptability denotes a risk level which both individuals and the society are able to accept without specific risk management actions. The acceptable level is also related to tolerable risk, defined as a level which the society is able to accept as long as the risk is monitored and risk reduction actions are undertaken. A. Kosieradzka, J. Zawiła-Niedźwiecki: *Zaawansowana metodyka oceny ryzyka…*, p. 264—265.

[12] *Zapobieganie stratom w przemyśle*. Red. A.S. Markowski. Cz. 3: *Zarządzanie bezpieczeństwem procesowym*. Łódź 2000, p. 191.

[13] A nuclear test means a single or at least two nuclear explosion(s) conducted at a test site within an area delineated by a circle having a diameter of 2 km within a total period of 0.1 second. Source: Protocol of 1990 to The Treaty on the Limitation of Underground Nuclear Weapon Tests — Threshold Test Ban Treaty (TTBT) of 1974.

factors. It is estimated that approx. 2,050 nuclear weapon tests[14] have been conducted worldwide in the atmosphere, underground and underwater. The effects of using nuclear weapon, without distinguishing between military and civilian targets, may occur immediately even in the areas situated far away from the detonation location. They include a shock wave, ionising radiation and thermal radiation. However, the delayed action of such weapon (from several hours to decades) takes the form of radioactive fallout which contains radioactive substances formed during an explosion (approx. 200 isotopes of 35 elements). Sample calculations showing the effects of a hypothetical nuclear load application are presented in the next part of the article, in Fig. 2.

Nuclear weapon can be classified according to various criteria, the most important of which include:

— the number of stages and types of nuclear reactions: single-stage weapon (nuclear fission of the nuclei of heavy elements — uranium or plutonium), two-stage weapon (fission and fusion of light elements) and three-stage weapon (works according to the following scheme: fission — fusion — fission)[15];
— load name (atomic, hydrogen, thermonuclear);
— purpose (strategic, tactical and operational, tactical);
— load power (very small, small, medium, big and very big).

Due to operational needs, especially the methodology of estimating the effects of a nuclear explosion, defining the load power is of fundamental importance. That value means the energy released *via* a nuclear explosion and is expressed using a TNT equivalent (units: kilo- or megatons).[16] It constitutes the basic piece of information which characterises an explosion in military terms or a test explosion. Its determination allows one to conduct further calculations aimed at, among other things, forecasting the radioactive contamination zones, fires, casualties, infrastructure destruction etc. It can be established with measuring instruments such as seismic, hydroacoustic or infrasound stations[17]

[14] https://www.ctbto.org/nuclear-testing/history-of-nuclear-testing/types-of-nuclear-weapons-tests/ (accessed: 2.05.2019).

[15] Three-stage nuclear loads — they contain two different fissile materials and a material undergoing fusion. At the first stage of an explosion, Uranium-235 or plutonium undergoes fission. The released energy initiates the fusion of light elements which takes place at stage two. The high-energy neutrons emitted during that reaction cause the fission of Uranium-238 — that reaction takes place at the third explosion stage. These are sometimes referred to as "jacket loads" in Polish because Uranium-238 usually constitutes a shell (jacket) of three-stage loads (bombs, warheads).

[16] J. Kubowski: *Broń jądrowa*. Warszawa 2008, p. 22—23.

[17] The abovementioned stations form the International Monitoring System provided for in the Comprehensive Nuclear-Test-Ban Treaty. Seismic stations can locate seismic incidents and distinguish between nuclear explosions and earthquakes. Hydroacoustic stations use highly sensitive microphones (acoustic sensors of pressure) to detect acoustic waves, including those caused by explosions, from a long distance. Infrasound stations detect sound waves of a very

or laboratories recording the presence of selected radioactive elements in the atmosphere[18] as well as based on the parameters of the radioactive cloud estimated by specialised observation posts.

The specificity of nuclear weapon has made it play a deterring role from the very beginning; this was especially visible during the Cold War. However, nuclear deterrence has been modified throughout the years to match the needs of the changing political and military situation. Consequently, it has evolved into the following subsequent strategies: "conventional forward defence and air counter-attack," "massive retaliation," "mutually assured destruction" and "elastic reaction" as well as their versions (Schlesinger's doctrine of limited nuclear options of 1974 and Presidential Directive 59 of 1980).[19]

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low frequency in the atmosphere and can distinguish between nuclear explosions, volcanic eruptions and falling meteorites. See more in: A. Suda: *Traktat o Całkowitym Zakazie Prób z Bronią Jądrową — niedokończony rozdział rozbrojenia nuklearnego.* "Ekoatom" 2013, nr 9, p. 39.

[18] The presence of certain radioactive particles (e.g. Cs137, H3, C14, Sr90, I131) in the air constitutes irrefutable evidence of having conducted a nuclear explosion. Cs and Sr are particularly dangerous to people.

[19] "Conventional forward defence and air counter-attack" (1950) was also called "the sword and the shield" and was the first strategy adopted by NATO. It assumed the use of the American nuclear weapon delivered by strategic aircraft (the sword) and the European conventional forces to ensure defence against a massive Russian attack (the shield). The "massive retaliation" strategy was developed by the then Secretary of State J.F. Dulles in 1954 and adopted by NATO three years later. It was a response to the increasing advantage of the Soviet Union in conventional forces. The strategy assumed the creation of a "nuclear umbrella" over the European NATO Member States to discourage the opposite party from aggression. The distribution of the American non-strategic nuclear weapon in Europe also began at that time. The "mutual assured destruction" (MAD) theory of 1964 was the basis for the defensive doctrines from the Cold War period. Its assumptions were based on the balance of power and the belief that the use of nuclear weapon by one party to the conflict would trigger a retaliation strike with disastrous effects. The "elastic reaction" strategy was developed in 1967 by the then Secretary of State R. McNamara. It treated the conventional forces as the main defence asset, while nuclear weapon was seen as a supporting element. The elastic use of nuclear weapon had two meanings. First, to minimise casualties among civilians, it was planned to attack only the enemy's selected nuclear facilities (systems). Second, nuclear planning demonstrated clear-cut phases: controlled nuclear escalation aimed at forcing a stop to the fights and then a massive nuclear attack (both strategic and non-strategic). In 1974, the North Atlantic Alliance acknowledged the role of French and British nuclear forces in nuclear deterrence. Schlesinger's doctrine was developed in the same year. Its main assumptions come down to signalling the readiness for further escalation and strategic support for collective defence in Europe. Presidential Directive 59 broadened the range of selective attacks (to include i.a. political targets) and assumed an expansion of the commanding systems and new combat assets, such as MX and Trident II ballistic missiles, self-controlled missiles launched from the aircraft and B-2 bombers. A. Kacprzyk: *Polityka jądrowa USA a odstraszanie w Europie, notatki z wykładu*. War Studies University, 11 April 2018. Unpublished material.

In the 1990s and at the beginning of the 21st century, nuclear weapon lost some of its significance as a retaliation-based deterrence factor. The administration of G.W. Bush made it play a smaller role and emphasized the integration of nuclear forces with conventional offensive assets as well as nuclear arsenal elasticity. It was allowed to use nuclear weapon only against a country which attacked the United States territory with any weapon of mass destruction. The North Atlantic Alliance also reckoned that the hazard of a conflict requiring a military response had diminished. Throughout that period, numerous countries intensified their effort to enter the Alliance. The hazard which commenced the strategic discourse at that time and is still present there is nuclear proliferation and rocket missile technology development. This was accompanied by President Bush labelling Iraq, Iran and North Korea as "the axis of evil" in 2002.

The contemporary conditions of nuclear deterrence

It was not predicted at the beginning of the present decade that its end would see a specific renaissance of nuclear weapon and a return to nuclear deterrence. The Global Zero option[20] did not seem probable, but the new nuclear policy by President B. Obama announced in April 2010 was perceived as a long-term effort to eliminate this weapon category. It was planned to diminish further the significance of nuclear arsenals in comparison with the previous strategy pursued by President Bush, while conventional forces were supposed to gain more importance. Obama's administration limited the possibility of conducting a nuclear strike only to the states which owned this kind of weapon. It was simultaneously declared that no new technologies of building nuclear resources would be developed.[21]

The adoption of that strategy coincided with the signing of New START (Treaty on Measures for the Reduction and Limitation of Strategic Offensive Arms) in Prague. The treaty was signed on 9 April 2010 by Presidents B. Obama and D. Medvedev and replaced the previous treaty, START I,[22] which had ex-

[20] The term is the name of an organisation founded in December 2008, which aims at the worldwide elimination of nuclear weapon. See more — https://www.globalzero.org/about-us/our-mission/ (accessed: 2.05.2019).

[21] *National Security Strategy 2010* — http://nssarchive.us/NSSR/2010.pdf p. 23 (accessed: 2.05.2019).

[22] New START was preceded by the following treaties: Start I (Strategic Arms Reduction Treaty), signed on 31 July 1991, which expired on 5 December 2009, Start II, signed on 3 January 1993 (it did not enter into force because the Russian parliament did not ratify it) and SORT (Strategic Offensive Reductions Treaty), signed on 24 May 2002, under which

pired five months earlier. The parties decided that, within seven years, each of them would reduce the number of nuclear warheads to 1,550[23] pieces distributed[24] on selected delivery means — intercontinental ballistic missiles (ICBM), submarine-launched ballistic missiles (SLBM) and heavy bombers[25] adapted to deliver nuclear weapon. The delivery means themselves were limited to 800 pieces of equipment, including 700 so-called distributed pieces remaining fully ready to use. When one remembers that those arms categories were reduced in comparison with the SORT and START I treaties by 30% and 70% respectively, one understands the generally favourable comments accompanying the signing of New START. The press reports of the time announced a historical event, a milestone on the way to the world without nuclear weapons, a breakthrough in mutual trust and the conscious responsibility of both nuclear superpowers.

The signing of the treaty was of great political significance to both parties. The United States perceived it as an important step within "resetting" the relations with Russia, while the latter viewed the negotiations and their positive result as a confirmation of its own prestige and its status of an equal partner of the USA.[26] The political context was additionally strengthened by the verification mechanisms aimed at building trust. The most important of them assumed an exchange of telemetric data on test flights of new rocket missiles, inspections in the bases where the weapons governed by the treaty were distributed and giving special identification labels to mobile missile launch systems. The treaty was adopted as binding for ten years (till 2021) and can be extended by five years.

The seven-year period of strategic nuclear weapon reduction as declared by both states expired in 2018. Therefore, it is suitable to sum up the treaty effects and analyse the obtained results.

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the number of nuclear warheads was to be reduced to 1700—2200 pieces for either party till 31 December 2012. SORT also confirmed the validity of START I.

[23] The Treaty Between The United States of America and the Russian Federation on Measures for the Further Reduction and Limitation of Strategic Offensive Arms, art. II, par. 1.

[24] Distributed warheads are those installed on delivery means or located in the bases where operationally ready nuclear forces are stationed.

[25] A heavy bomber is one which has a range exceeding eight thousand km and/or is equipped with a nuclear long-range strategic air-launched cruise missile (ALCM). It is interesting that the parties defined a heavy bomber for nuclear weapon verification purposes as a bomber carrying one load regardless of its real capabilities. Source: Protocol to the Treaty Between The United States of America and the Russian Federation on Measures for the Further Reduction and Limitation of Strategic Offensive Arms, Part One.

[26] Z. Lachowski: *Nuklearne rozbrojenie i nieproliferacja: geneza, stan i perspektywy.* "Bezpieczeństwo Narodowe" 2012, nr 22, II, p. 72.

Table 1

Strategic nuclear weapon reduction under New START

	2011			2019		
	Distributed: ICBM, SLBM, heavy bombers	Total: ICBM, SLBM, heavy bombers	Warheads	Distributed: ICBM, SLBM, heavy bombers	Total: ICBM, SLBM, heavy bombers	Warheads
The USA	882	1,124	1,800	656	800	1,365
Russia	521	865	1,537	524	760	1,461

Developed by the author.
Source: US Department of State, Bureau of Arms Control, Verification and Compliance: February 2011, March 2019[27].

The presented data show that the United States and Russia fulfilled the obligations they had assumed. However, New START concerned only a part of the strategic nuclear arsenal, albeit that was the key part for the bilateral negotiations. One should highlight that every ICBM can deliver several nuclear warheads, while the SLBM distributed on submarines are considered as the first-strike weapon owing to the element of surprise. Unfortunately, due to the limitations introduced in the treaty, the latter has not significantly affected the total amount of the nuclear weapon owned by both superpowers. According to the data of the Stockholm International Peace Research Institute, the United States still have 6,450 warheads at their disposal, including 1,750 operationally ready ones, while Russia owns 6,850 warheads, 1,600[28] of which are operationally ready. The continued existence of such big arsenals (they jointly constitute 91% of the world's resources of strategic nuclear weapons) lets certain nuclear states, especially China, use this disproportion[29] to marginalise the significance of their own nuclear weapons during disarmament talks.

Considering the significance of New START, one must underline that, till its expiration in 2021, it will be the only treaty[30] between the United States and Russia allowing for information exchange regarding the amount of the strategic nuclear weapon owned by the two states. If New START is not extended, one can forecast that the negative effect will be the impossibility of data exchange between both states concerning the size, development and modernisation of their

[27] https://2009-2017.state.gov/t/avc/rls/164722.htm; https://www.state.gov/t/avc/newstart/290759.htm (accessed: 4.05.2019).

[28] SIPRI Yearbook 2018 Armaments, Disarmament and International Security, p. 11.

[29] The nuclear resources of the remaining countries (as of 2018): France — 300 warheads, China — 280, Great Britain — 215, India — 130—140, Pakistan — 140—150, Israel — 80, North Korea — 10—20. Ibidem.

[30] In February 2019, the United States and subsequently Russia commenced their withdrawal from the INF Treaty (Treaty on Intermediate-range Nuclear Forces), which imposes complete elimination of intermediate-range ballistic missiles.

nuclear arsenals. One is also justified in fearing that, once the limitations stemming from the treaty are abolished, Russia will strive to increase the potential of its Strategic Nuclear Forces. The signs auguring this include i.a. plans of providing the army with additional RS-28 Sarmat intercontinental ballistic missiles which can deliver "Avangard" hypersonic systems as well as replacing the older RS-12M1 Topol-M missiles with modern ones — RS-24 Yars.[31]

Regardless of strategic arsenals, the significance of which gradually diminishes (predominantly due to the low probability of using nuclear loads with a big or very big power), the United States, Russia and the remaining nuclear states have tactical nuclear weapons (TNW) at their disposal. TNW parameters make it suitable for use during combat operations on a limited (tactical) scale. The significant properties in this case are: a limited range of 450—500 km and a relatively small power. This is clearly visible in comparison with thermonuclear weapons: the striking power of the latter is expressed in megatons and their tactical load of 15—20 kilotons is comparable with the bombs dropped on Hiroshima and Nagasaki.[32]

A combination of numerous factors has contributed to the increase in significance of this weapon category, which raises a growing number of concerns in Europe, especially the Baltic states and Poland. First, it must be stressed that tactical nuclear weapons have not been a subject of any disarmament treaty yet[33]. Consequently, no official data exist regarding their real resources in various countries. Nevertheless, Russia is believed to be a TNW tycoon because it

[31] Information note of 6 June 2019 by the Defence Attaché in Moscow (this article does not state the planned quantities of the abovementioned armament types or the names of the army units supposed to receive this equipment). The Sarmat ballistic missile weighs approx. 100 tons and can deliver up to 16 combat warheads with a power of two megatons each to the distance of 18 thousand km. The RS-24 Yars intercontinental ballistic missile can deliver up to six combat warheads with a power of 300 kilotons each to the distance of approx. 11 thousand km.

[32] The classification of tactical nuclear weapons according to their load power is relative because the value bracket is very diversified, ranging from less than one kiloton to as many as 50 kt. Russia's Raduga Kh-22 missiles are adapted to deliver warheads of 1 Mt, which exceeds the "norms" for TNW many times.

[33] Attempts to regulate the TNW issue are known as Presidential Nuclear Initiatives (PNI), which were informal unilateral actions taken in 1992. President of the USA G. Bush Senior and then President of the Soviet Union Mikhail Gorbachev obliged to have their respective countries destroy significant amounts of the TNW stockpiled in their arsenals. However, those initiatives had no verification mechanisms, so it is hard to determine nowadays whether all of their obligations have been fulfilled and how many pieces of such weapons remain at the disposal of both states. The TNW negotiation attempts made by the administration of B. Obama in June 2013 also failed because Russia conditioned commencing the talks on meeting a number of conditions unacceptable to the United States, i.a. complete withdrawal of American B-61 nuclear bombs from Europe, giving up the construction of the Ballistic Missile Defence in the Central and Eastern Europe and including the nuclear potential of Great Britain in the negotiations.

traditionally perceives tactical nuclear weapons as a way of counterbalancing the economic, scientific and technological advantage of the United States and the North Atlantic Alliance Member States. Russia is estimated to possess approx. two thousand non-strategic warheads allocated to the individual types of its armed forces.[34] An additional trump card of Moscow is the wide series of delivery means which includes mobile missile launch systems, artillery, aircraft, torpedoes, depth charges and mines. The difficulties in determining the number of the Russian systems which deliver non-strategic nuclear weapons stem i.a. from their dual use. Most of those systems lack the characteristic external features which allow the experts to distinguish between conventional and nuclear variants.

Russian tactical nuclear weapons are constantly modernised in order to increase their CEP and range with a simultaneous reduction of their manufacturing and operation costs[35]. This is clearly disproportionate to the amount of the American non-strategic nuclear weapons distributed in Europe. It is worth reminding that, after withdrawing selected armament systems from the continent in the 1990s, the resources are estimated to reach approx. 150 pieces. These include B-61 gravity bombs with adjustable power (approx. 0.3 to 150 kilotons) distributed in five NATO Member States: Belgium, the Netherlands, Germany, Turkey and Italy. When analysing the risk posed by the contemporary tactical nuclear weapon, one must consider not only its amount, but also, or maybe first and foremost, the role it plays in the military doctrines of the states which have it at their disposal, especially Russia and the United States.

The provisions on nuclear weapons included in the binding military doctrine of the Russian Federation of December 2014 coincide with the relevant views expressed in the previous doctrine (2010). The current doctrine states that "[prevention] of a nuclear military conflict . . . is the basis of the military policy of the Russian Federation". Nonetheless, the main tasks in the scope of deterring and preventing military conflicts include maintaining "the nuclear deterrence potential at a sufficient level."[36] Moreover, "[the] Russian Federation shall reserve the right to use nuclear weapons in response to the use of nuclear and other types of weapons of mass destruction against it and/or its allies, as well as in the event of

[34] The probable allocation of TNW to the types of the armed forces is as follows: air force: approx. 730 loads delivered by suitably adapted planes (Tu-22M3 Backfire-C, Su-24M Fencer, Su-34 Fullback, Su-25 Frogfoot and Su-30 Flanker-C); navy: approx. 700 loads (rocket missiles, rocket-assisted torpedoes, torpedoes and depth charges) distributed on submarines and surface combatants; air defence forces: approx. 430 loads (ground-to-air missile systems, antiballistic systems); land forces: approx. 170 loads delivered by mobile missile launch systems — SS-21 Scarab (Tochka) and SS-26 Stone (Iskander).

[35] Note of 19 June 2019 by the Defence Attaché in Washington.

[36] The military doctrine of the Russian Federation, clause 20 and 21c — https://web.archive.org/web/20150721195150/ (accessed: 28.05.2019); http://www.rusemb.org.uk/press/2029 (accessed: 28.05.2019).

aggression against the Russian Federation with the use of conventional weapons when the very existence of the state is in jeopardy."[37] The unsettling aspect here is both the mere possibility of using nuclear weapons in conventional combat operations — an act of this kind would completely change the nature of a conflict — and the unclear definition of the circumstances authorising such a decision, which is a prerogative of the President of the Russian Federation.

When the conflict in Ukraine began, the Russian nuclear threats intensified. They were intended to underline that in case attempts were made to return Crimea to Ukraine by force, Russia possessed diversified and effective retaliation assets and tactical nuclear weapons played a significant role among them. This narrative is visible in the statements of the persons holding key political and military positions, i.a. President Vladimir Putin[38] and Chief of the General Staff of the Armed Forces of Russia Valery Gerasimov.[39]

A manifestation of this nuclear determination is so-called de-escalation nuclear strike scenario. It has not been officially confirmed, but the mere presumptions emerging in relation to it have aroused a feeling of uncertainty in the world. It is believed, among other things, that Russia may decide to detonate a tactical nuclear load in the territory of a state which does not possess a nuclear arsenal. This would take place at the initial stage of a conflict. Taking into account the geographical location of Poland and the current political and military conditions, the hazard for that country is obvious. The aim of such an attack would be to discourage the NATO Member States, especially Western Europe, from supporting their attacked ally, and therefore to end the conflict on the conditions imposed by Moscow. From the Russian point of view, this would be a specific "de-escalation."

It is also highly probable that Russia practised the use of various nuclear weapon delivery means and even mock attacks on targets located in enemy territory during the cyclically held Zapad military exercise (2013, 2017). European capital cities, beginning with Warsaw and Vilnius, are listed in this context (an attack on Warsaw is visualised in Fig. 2). Experts also mention facilities of strategic importance in Sweden.

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[37] Ibidem, clause 27.

[38] For example, in August 2014 in Yalta, Putin announced that he would soon "surprise the West with . . . new developments in offensive nuclear weapons". At a meeting with young people the same month, he stressed that Russia "was strengthening its military and nuclear potential" and that "Russia was one of the most powerful nuclear states" — https://www.tvp.info/16832858/putin-testuje-rakiete-i-straszy-bronia-atomowa-nuklearny-atak-mozliwy-ekspert-w-zasadzie-tak (accessed: 2.06.2019).

[39] In December 2016, during a meeting with the military attachés accredited to Russia, General Valery Gerasimov stated that in 2016, "the main efforts of the Ministry of Defence focused on maintaining the nuclear potential" — https://www.tvn24.pl/wiadomosci-ze-swiata,2/rosja-armia-poswieci-szczegolna-uwage-strategicznej-broni-jadrowej,700059.html (accessed: 2.06.2019).

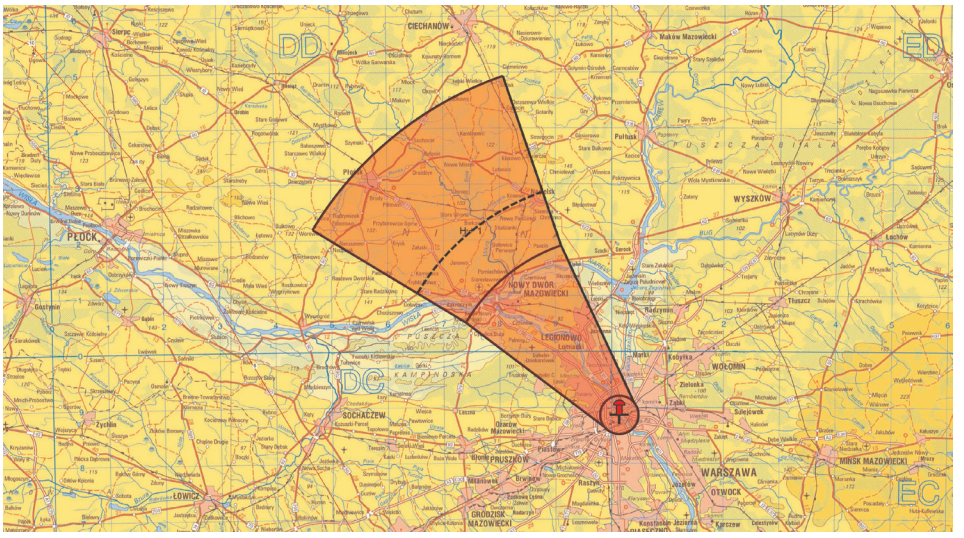

Fig. 2. The forecast contamination after a hypothetical nuclear strike on Warsaw. Developed by the author using "Promień" — an electronic contamination forecasting and assessment system. Map scale: 1: 500 thousand.

Assumptions: explosion site (ground zero) — the Śląsko-Dąbrowski bridge, load power — 20 kilotons, averaged wind direction in the upper layers of the atmosphere — 320 degrees, effective wind speed — 42 km/h.

The calculations show that the most tragic effects of the attack would take place inside a virtual circle with a radius of approx. 3.4 km and ground zero as the centre. It is predicted that over 90% of the population present in the area would be harmed at the moment of the attack, 43% of whom would die; further deaths would take place within the first six months and later.[40] Taking into account that the average population density in the city centre (Śródmieście district — the explosion site) is 7,515 people per km^2, i.e. nearly two times higher than the Warsaw average (3,412 people per km2),[41] the only possible conclusion is that the attack would cause a humanitarian disaster requiring international help.

One must also stress that buildings in the area, including those with reinforced concrete structures, would be destroyed or damaged and their collapsed remnants would create continuous or local obstacles to the rescue service equipment. A separate hazard would be posed by spot and area fires (second- and third-degree burns of the human body) as well as destruction of heating devices and power and gas supply systems.

[40] Calculation basis: *Metodyki prognozowania i oceny strat w rejonach uderzeń jądrowych*. Warszawa 1991, p. 21—23 and 70—71.

[41] „Przegląd Statystyczny Warszawy" 2018, nr 1, table 6, p. 39.

Another parameter characterising a nuclear explosion is ionising radiation and radioactive fallout which spreads downwind, thus causing radioactive contamination in the area situated far away from the epicentre. In the analysed example, two contamination zones would be formed: zone I — 32 km, zone II — 64 km.[42] Their shape is presented in the figure.

The current stance of the United States on nuclear issues[43] was published in *Nuclear Posture Review* (NPR) in February 2018. The significance of NPR is proved by its publishing in the initial period of the term of office served by a new president. The document contains the most important arrangements concerning the nuclear policy of the United States, including the nuclear weapon use strategy and arsenal modernisation plans.

In NPR 2018, the administration of Donald Trump states that returning to the idea of nuclear deterrence in the scope adequate to diagnosed hazards is the priority. The greatest hazards indicated in the document are: the readiness manifested by Russia to use non-strategic nuclear weapons at the initial stage of a conflict and Russian expansion and modernisation programmes concerning delivery means.[44] The changes in NPR 2018 are also justified with lack of transparency in the nuclear policy of China, which "possesses nuclear warheads… and nuclear-armed, theatre-range ballistic missiles capable of reaching [US] territory, allies, partners, forces, and bases in the region."[45] The document also highlights the increasing activity of Chinese army in the area of South China Sea and the territorial claims of that superpower toward its neighbours. The Central State is accused of conducting secret nuclear tests of loads with a small and very small power and probably (author's note) "having implemented a programme of fast expansion and diversification of the nuclear arsenal, allowing it to double its resources of this weapon during the next decade."[46]

Another state mentioned in the NPR is North Korea, the armament policy of which has raised justified concerns in recent years. One should recall the accel-

[42] Unprotected persons exposed to ionising radiation in zone I may absorb a dose equal to or exceeding 150 cGy in less than four hours of the moment they are reached by the radioactive fallout. The total dose absorbed by unprotected persons exposed to the radiation in zone II should not exceed 150 cGy in the first four hours of the moment they are reached by the radioactive fallout; it is simultaneously assumed that the dose would exceed 50 cGy within 24 hours. Persons staying outside zone I and II may absorb a radiation dose not exceeding 50 cGy within 24 hours of the moment they are reached by the cloud; the total dose till the radiation fades would not exceed 150 cGy. Source: *Metodyka oceny sytuacji skażeń chemicznych, biologicznych i promieniotwórczych*. Warszawa 2013, p. 200.

[43] The previous *Nuclear Posture Review* of 2010, drafted by the administration of B. Obama, is mentioned on page 8 of this article.

[44] https://media.defense.gov/2018/Feb/02/2001872886/-1/-1/1/2018-NUCLEAR-POSTURE-REVIEW-FINAL-REPORT.PDF (accessed: 14.06.2019).

[45] Ibidem, p. 31—32.

[46] Information note of 4 June 2019 by the Defence Attaché in India, New Delhi, p. 1.

eration of its nuclear programme and the fiasco of the meetings between Trump and Kim Jong Un concerning i.a. denuclearisation of the Korean Peninsula (June 2018, February 2019). An equally significant hazard to international security is still posed by Iran, against which the United States restored economic sanctions in May 2019.[47] The dynamics of the events concerning the Iranian nuclear programme manifest itself in the fact that on 7 July 2019, Iran announced returning to uranium enrichment above the 3.67% threshold defined in the Joint Comprehensive Plan of Action of 14 July 2015.

Nuclear Posture Review has the nature of a doctrine and contains the official stance of the American administration on the possible use of the nuclear arsenal. Like the previous reviews, NPR 2018 confirms the principle of "no first use" against the countries which do not possess nuclear weapons and have ratified the Nuclear Non-Proliferation Treaty (NPT) and observe its provisions. At the same time, it permits using nuclear weapons in response to attacks with chemical and biological weapons as well as, which is a novelty in the NPR, cyberattacks aiming at the US nuclear systems, critical infrastructure, commanding systems etc. That clause broadens the scope of the possible nuclear response in comparison with NPR 2010, which excluded such possibility. It refers to the assumptions of G. Bush's nuclear doctrine of 2002, which was dominated by the prevention of and defence against terrorist attacks, including chemical and biological ones. The NPR from that period indicated the states belonging to "the axis of evil" (Iraq, Iran, North Korea, Syria and Libya) as potential targets of an American nuclear attack. It also allowed for the use of small-power nuclear loads to destroy underground bunkers and fortified depots of biological and chemical weapons.

The 2018 Review announces the planned modernisation of all the nuclear triad elements: ICBM, heavy bombers and SLBM-delivering submarines. The modernisation is divided into stages. First, it is planned to reduce the warhead power in selected Trident II D-5 submarine-launched missiles to adjust them to tactical use. It is simultaneously assumed that new versions of F-35 and B-21 planes as well as nuclear-armed long-range stand-off (LRSO) cruise missiles integrated with them will be commissioned for use in the army in the middle of the 2020s. Moreover, long-term plans (7—10 years) provide for equipping US Navy again with sea-based self-controlled missiles.

Analysing the contemporary conditions of nuclear deterrence requires presenting the stance of the North Atlantic Alliance, which was most comprehensively expressed in the NATO Warsaw Summit Communiqué. The introductory part contains an assessment of contemporary hazards; a separate paragraph

[47] On 14 July 2015 in Vienna, the P5+1 (the USA, China, Russia, France, Great Britain and Germany) concluded a nuclear agreement with Iran, the Joint Comprehensive Plan of Action (JCPOA), after 12 years of negotiations. Iran obliged to stop the works on its nuclear programme in exchange for the abolition of economic sanctions.

(clause 10) is devoted to "Russia's destabilising actions and policies," which include i.a. "its irresponsible and aggressive nuclear rhetoric."[48] The strategic goal of the Alliance defined in the Communiqué is the strengthening of deterrence and defence "based on an appropriate mix of nuclear, conventional, and missile defence capabilities." A combination of these elements should counterbalance the arsenals of potential enemies. The document unambiguously states that "[as] long as nuclear weapons exist, NATO will remain a nuclear alliance."[49]

Implications of WMD proliferation for international relations

In the present decade of the 21st century, proliferation is considered first and foremost in the context of the actions taken by selected states and organisations (i.a. terrorist ones) in order to acquire WMD or the technologies and components necessary for its manufacture.

A possible way of applying the acquired assets would be a CBRN terrorist attack: chemical (chemical terrorism), biological (biological terrorism), radiological or nuclear, the latter also referred to as superterrorism, grand terrorism or catastrophic terrorism in order to highlight the effect of a hypothetical attack, which would reach hundreds of casualties (or more) in certain conditions. Depending on the target of an attack and the manner of its conducting, CBRN terrorism variants also include agriterrorism, which destroys agricultural crops, and zooterrorism, which causes losses of farm animals.[50] Both types result in significant losses suffered by the economy of an attacked state.

The most spectacular act of CBRN terrorism was conducted in 1995 in the Tokyo underground by a Japanese sect called Aum Shinrikyō (Supreme Truth): 12 people died and approx. 5,500 were harmed, including approx. 50 severely harmed. After that event, counteracting the hazards of this type became the top priority.

One must underline that CBRN assets constitute a very dangerous weapon of diversified action when used by the perpetrators. They allow the attackers to manifest their ruthlessness and cause fear, dread and multi-faceted psychological effects among victims. The list of operational advantages is completed by the

[48] Warsaw Summit Communiqué Issued by the Heads of State and Government participating in the meeting of the North Atlantic Council in Warsaw 8—9 July 2016, p. 3.

[49] Ibidem, p. 12.

[50] The list of the most hazardous biological agents contains 18 animal and 19 plant pathogens, including the bird flu virus, the classical swine fever (CSF) virus and the cattle plague virus. See more in: B. Michailiuk: *Broń biologiczna jako zagrożenie bezpieczeństwa państwa.* Warszawa 2015, p. 330—332.

possibility of surprise (a hidden attack) and difficulties in detecting, identifying and proving an act of terror; this concerns especially bioterrorism.[51]

The WMD proliferation problem is in the centre of attention of the United Nations, the European Union,[52] numerous international authorities, individual states and groups of states, i.a. the Visegrad Group.[53]

WMD proliferation, development and research has been criticised by Vatican many times. During a conference entitled "Perspectives for a World Free from Nuclear Weapons and for Integral Disarmament," held in November 2017, Pope Francis underlined, "International relations cannot be dominated by military strength [or] mutual intimidation… Weapons of mass destruction, particularly atomic, create nothing more than a false sense of security and cannot constitute the basis of peaceful coexistence between members of the human family."[54]

President of the Republic of Poland Andrzej Duda referred three times to the proliferation of WMD, especially chemical and nuclear weapons, during his speeches at the UN Security Council in January, May and September 2018. The President considered counteracting that hazard "as an important element of the

[51] See more in: W. Wątor: *Terroryzm CBRN — wyzwanie dla służb i administracji publicznej.* W: *Wyzwania i zagrożenia dla bezpieczeństwa międzynarodowego i narodowego pod koniec drugiej dekady XXI wieku.* Red. K. Czornik, M. Szynol. Katowice 2017, p. 219—245, and W. Wątor: *Przeciwdziałanie terroryzmowi CBRN w świetle prawa polskiego.* W: *Zarządzanie kryzysowe w aspekcie zagrożeń terrorystycznych.* Red. B. Michailiuk, J. Solarz, J. Stempień. Warszawa 2019, p. 213—232.

[52] The EU stance on proliferation is included in the EU Strategy Against Proliferation of Weapons of Mass Destruction issued in December 2003. In December 2008, the EU adopted a new document entitled New Lines of Action by the European Union in Combating the Proliferation of WMD. It aims at facilitating operational cooperation in combating the proliferation of WMD by: (a) turning non-proliferation into a cross-cutting priority of EU and the Member States' policies; (b) identifying the existing best practice of combating the proliferation to encourage the spread of such practice in the Member States; (c) encouraging better coordination of the Member States' national policies and of existing EU tools and policies; (d) identifying the areas where EU action must be stepped up. — https://www.msz.gov.pl/pl/polityka_zagraniczna/polityka_bezpieczenstwa/nieproliferacja_broni_masowego_razenia/najwazniejsze_porozumienia_i_inicjatywy_z_zakresu_nieproliferacji_i_rozbrojenia_bmr/ (accessed: 17.06.2019).

[53] An example of such action was the strategic workshop of the Visegrad Group states in 2013. In one of its thematic blocks, entitled "Security environment in the perspective of 10—15 years", the proliferation of WMD and its delivery means was acknowledged as one of the main hazards. "Responsibility for a Strong NATO", a declaration of the Visegrad Group of 18 April 2012, indicates CBRN (chemical, biological, radiological and nuclear) defence as one of the projects enabling so-called smart defence. See more in: R. Kupiecki: *Visegrad Defence Cooperation: From Mutual Support to Strengthening NATO and the EU.* A Polish Perspective. Report No. 35. Centre for European Policy, 2013, p. 4—6, DAV4 Full Report. Towards A Deeper Visegrad Defence Partnership, Central European Policy Institute, 2012, p. 10—13.

[54] https://www.romereports.com/en/2017/11/10/pope-francis-on-nuclear-arms-international-relations-cannot-be-dominated-by-military-strength/ (accessed: 16.06.2019).

Polish security policy."[55] Referring to the gas attacks in Syria and the attempt at murdering S. Skripal in Great Britain, the President stated, "Every use of a chemical weapon is a crime. It does not matter whether it is used on a mass scale by non-democratic regimes against their own peoples… or during an act of national terrorism."[56] Concerning nuclear weapon proliferation, the President stressed its negative impact on the security level in the Central and Eastern Europe.[57]

Poland's increased activity concerning proliferation prevention is related to its term of office as a non-permanent member of the UN Security Council in 2018—2019. Poland's involvement was also visible last year when it chaired the works of the Preparatory Committee to the 2020 Nuclear Non-Proliferation Treaty Review Conference as well as the sessions of the International Code of Conduct against Ballistic Missile Proliferation (the Hague Code of Conduct, HCOC).

The basis for combating the proliferation is international agreements devoted to individual WMD types. They demonstrate significant diversification, from the genesis of their conclusion,[58] *via* their purpose, the obligations of the signing states and the control and verification mechanisms included, to their effectiveness. They also vary in their universality indicators, expressed as the number of states which have signed and ratified a given agreement or remain beyond them (table 2).

[55] Speech of the President of the Republic of Poland during a High-Level Debate of the UN Security Council on 17 May 2018 — https://www.prezydent.pl/aktualnosci/wypowiedzi-prezydenta-rp/wystapienia/art,420,wystapienie-prezydenta-rp-andrzeja-dudy-podczas-debaty-wysokiego-szczebla-rady-bezpieczenstwa-onz.html (accessed: 16.06.2019).

[56] Speech of the President of the Republic of Poland at a meeting of the UN Security Council on 26 September 2018 — https://www.prezydent.pl/aktualnosci/wypowiedzi-prezydenta-rp/wystapienia/art,531,wystapienie-podczas-posiedzenia-rady-bezpieczenstwa-onz.html (accessed: 16.06.2019).

[57] This is confirmed by the following speech fragment: "Within the last few years alone, we have witnessed an evident breach of the Budapest Memorandum, which guaranteed the territorial integrity of Ukraine in exchange for a peaceful and voluntary denuclearisation of that country. We have also heard of using nuclear weapons to end conventional conflicts. The distribution of dual-use assets and technologies close to our borders has been equally alarming. All those actions have significantly contributed to a deterioration of the security environment". Ibidem.

[58] The first regulations in international law concern biological and chemical weapons. One should note that, on 17 June 1925, on the initiative of the head of Polish delegation, Gen. Kazimierz Sosnkowski, the Geneva Protocol for the Prohibition of the Use in War of Asphyxiating, Poisonous or Other Gases was broadened to include bacteriological methods of warfare.

Table 2

The legal status of WMD agreements in selected countries[59]

		The CWC Convention	The BTWC Convention	The NPT Treaty	The CTBT Treaty	The TPNW Treaty
The Middle East states	Saudi Arabia	signed, ratified	signed, ratified	signed, ratified	not signed	not signed
	Egypt	not signed	signed, not ratified	signed, ratified	signed, ratified	
	Iran	signed, ratified	signed, ratified	signed, ratified	signed, not ratified	
	Israel	signed, not ratified	not signed	not signed	signed, not ratified	
	Syria	signed, ratified (2013)	signed, not ratified	signed, ratified	not signed	
	India	signed, ratified	signed, ratified	not signed	not signed	not signed
	Pakistan	signed, ratified	signed, ratified	not signed	not signed	
	North Korea	not signed	signed, not ratified	denouncement of the Treaty (2003)	not signed	

Saerce: Developed by the author.

The table shows that the Middle East is the centre of the WMD proliferation problems. The elevated WMD-related risk in that region is indicated by the number of states which have not obliged to observe the abovementioned international agreements as well as the permanent inter-state and internal tensions.[60] Despite the actions taken by the international community since the turn of the 1960s and 1970s, the Middle East has not become a WMD-free zone. Many signs show that it will be difficult to reach an agreement on establishing such a zone in the oncoming years, too.

When analysing the influence of WMD on the contemporary international relations, one should highlight the case of Syria. When the conflict commenced in 2011, Syria possessed over a thousand tons of toxic warfare agents (TWA) characterised by high toxicity: yperite, sarin and VX. As the fights escalated,

[59] CWC — the Chemical Weapons Convention, BTWC — the Convention on the Prohibition of the Development, Production and Stockpiling of Bacteriological (Biological) and Toxin Weapons, NPT — the Non-Proliferation Treaty, CTBT — the Comprehensive Nuclear-Test-Ban Treaty, TPNW — Treaty on the Prohibition of Nuclear Weapons.

[60] According to a 2018 report by SIPRI, the main conflicts taking place in the Middle East and North Africa involve Egypt, Iraq, Israel, Libya, Syria, Turkey and Yemen. See the SIPRI Yearbook 2018..., p. 3.

concerns emerged that a part of the TWA might be seized by Islamist groups and that the Syrian army could use chemical weapons to break the enemy's resistance.[61] In August 2012, B. Obama warned President Bashar al-Assad that the United States would react should he decide to conduct a chemical attack. The warning evoked associations with the situation preceding the 2003 intervention in Iraq, the pretext for which was the announced intention to destroy Saddam Hussein's alleged weapons of mass destruction.

In August 2013, the international community was shocked by the news of a gas attack in Damascus which killed approx. 1,400 civilians. Though al-Assad's regime consistently denied having conducted that and the subsequent chemical attacks,[62] the tragedy suffered by the victims and the pressure put by the international public opinion led to intense talks between the heads of diplomacy of the United States and Russia. They resulted in an agreement on the Syrian chemical weapons, concluded by both States on 14 September 2013 in Geneva. Under the agreement, Syria signed the Chemical Weapons Convention on the same month and its TWA resources were to be completely destroyed in 2014. Due to the complexity and costs of destroying such a big amount of highly toxic chemical substances, six countries participated in the destruction of the Syrian chemical weapons. The United States made available their special ship named "Cape Ray", on which TWA disposal took place for safety reasons. Germany ensured the destruction of several hundred tons of the hydrolysate generated by the yperite decomposition process. Great Britain, Finland, Denmark and Norway were responsible for the transport and neutralisation of selected chemical substances.[63]

The destruction of Syria's TWA, officially confirmed on 4 September 2014 by Sigrid Kaag, head of the mission of the Organisation for the Prohibition of Chemical Weapons, was not equivalent to excluding the possible application of other available chemical substances for military purposes. About a dozen gas attacks, which probably utilised chlorine,[64] were recorded in the years 2014—

[61] See more in: M. Szybalski: *Broń chemiczna w syryjskiej wojnie domowej 2011—2018*. "Biuletyn CSOPBMR" 2018, nr 2(14), p. 2.

[62] Only two years after the attack, on 7 July 2015, did the UN Security Council pass a resolution aimed at determining the perpetrators who had used the chemical weapon in Syria in 2013. The USA, Great Britain and France blamed the Syrian army for the attack, while Russia, which supports al-Assad, highlighted that there was no irrefutable evidence of the government's blame available.

[63] S. Król: *Broń chemiczna w drugiej dekadzie XXI wieku*. „Biuletyn CSOPBMR" 2016, nr 6(16), p. 3.

[64] Chlorine — a green-coloured gas which becomes yellow when liquefied. Its unpleasant, sharp scent is perceptible already at a 1:100,000 dilution ratio. It is applied in numerous syntheses of the chemical industry as well as a whitening agent in the textile and paper industries. It is also used to disinfect water and wastewater. It has a destructive action on metals, certain plastics, rubber and protective coatings. The mechanism of its toxic action consists

2018. News agencies worldwide pointed at merely two such cases, of 7 April 2017 and 14 April 2018, mainly due to the retaliation strikes of the American, British and French forces at the Shayrat Airbase and selected Syrian scientific and military facilities.

The data presented in table 2, though limited to selected states, are representative and clearly demonstrate the difficulties in the WMD disarmament process.

Another unresolved problem is the nuclear test ban. The Comprehensive Nuclear-Test-Ban Treaty signed in 1996 has not entered into force yet. In order to become valid, it has to be ratified by the 44 states listed in Annex 2 to the Treaty which are capable of generating nuclear energy or possess research reactors. Consequently, though the Treaty has been signed by 184 states (and ratified by 168 states, including 36[65] from the abovementioned group of 44 states), the lack of ratification i.a. by the states listed in the table prevents it from entering into force.

The identical stances of India and Pakistan toward the abovementioned agreements, including those concerning nuclear weapons, stem from the exceptional significance those two states have ascribed to this weapon category in mutual deterrence. The phenomenon in question dates back to 1988, when both countries nearly simultaneously conducted series of nuclear tests (India: five explosions[66] on 11 and 13 May, Pakistan: two to five explosions on 28 May and one explosion on 30 May), therefore joining the nuclear superpowers club. The nuclear weapon development programmes were, and still are, justified by the Kashmir conflict, which has lasted for over 70 years and caused three full-scale wars, a number of skirmishes and a serious test of strength in 1999, the latter entailing a hazard of a nuclear strike exchange.

The region around the Line of Control, which is seven hundred kilometres long and separates the armies of both parties, is one of the most heavily militarised places in the world due to the forces which station there (approx. 100 thousand soldiers of either party). Despite the official truce agreement of 2003, the Line of Control sees several dozen military incidents annually which may turn into an open conflict. The risk is increased by the activity of the Islamic separatist groups supported by Pakistan which have conducted a number of bomb attacks on the Indian military and civilian targets in recent years. The latest attack on an Indian military convoy, conducted by Islamic radicals from Jaish-

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mainly in the creation of hydrogen chloride when gaseous chlorine comes into contact with moist mucous membranes and the skin, oxygen free radicals and other chlorine compounds exerting a strong biological action.

[65] https://www.ctbto.org/ (accessed: 2.07.2019).

[66] The first Indian nuclear test was code-named "Smiling Buddha" and took place in May 1974 (a plutonium load with a power of 12—15 kT or, according to American estimations, four to six kilotons). The subsequent Indian nuclear tests were conducted in 1988.

e-Mohammed (Muhammad's Army), killed 40 soldiers and triggered air fights during which both armies shot down the enemy's planes.

When assessing the hazard stemming from India's and Pakistan's possession of nuclear weapons, one should underline several significant factors. First, their nuclear arsenals have been maintained on the same acceptable level for years (approx. 130—140 warheads in India and approx. 140—150 warheads in Pakistan)[67] to ensure so-called credible minimum deterrence. Second, there are doctrinal differences concerning nuclear weapon application. India has obliged not to use it first, but it will not hesitate to apply it in retaliation for the enemy's nuclear attack. Pakistan, the conventional potential of which is much smaller than that of its eastern neighbour, allows for a spoiling attack. Moreover, the decision-making cycle is very vaguely defined. Taking into account the role of the army in that country and the exceptional position of the chief commanders, one can assume that a decision to use nuclear weapons will be made within their circles. Third, the countries are neighbours, so a possible flight of a nuclear-warhead missile will last only several minutes, making the verification and warning systems of little use in such case. Moreover, the probable adjustment of the Pakistani tactical nuclear weapons to be delivered by Haft-9 short-range missiles (their range is approx. 60 km), which are distributed close to the Line of Control, may confirm the existence of an option referred to as "use them or lose them." It permits launching a combat missile when it is threatened with seizure by an enemy conducting a fast-paced attack. This means a radical lowering of the decision-making threshold concerning missile use, probably to the level of tactical formation commanders.

The status of North Korea is symptomatic: it is the only country in the world which has not obliged to observe most WMD-related agreements (table 2). Beside its nuclear programme which attracts the public opinion's attention, North Korea is accused of not only possessing chemical and biological weapons, but also contributing to their dissemination. This information is hard to verify because the DPRK remains outside of the international agreements and therefore does not declare its resources or precursors to the manufacture of those weapons as well as refuses to undergo controls by specialised authorities. In such situation, all analyses are based on materials coming from satellite and electronic reconnaissance. However, their significance is limited because North Korea has obtained the operational masking capabilities and dispersed its secret research and manufacturing centres. Data verification *via* intelligence actions is practically impossible due to the incredibly elaborate control of the North Korean regime over the society.

Among the selected facts available, one must first and foremost highlight the murder of Kim Jong Nam, a stepbrother of the DPRK leader, carried out using

[67] SIPRI Yearbook 2018 Armaments, Disarmament and International Security, p. 11.

a toxic warfare agent called VX at the Kuala Lumpur airport in February 2017. The United States blamed the government in Pyongyang for the assassination and toughened the sanctions imposed on North Korea. This was criticised by Russia, which underlined lack of proof of DPRK participation in the murder. Another significant event concerning the North Korean activity in the field of chemical weapons was the publishing of a United Nations report in February 2018. The document contains information about approx. 40 shipments of forbidden components used in chemical weapon production which the DPRK handed over to Syria in the years 2012—2017.[68]

The presented examples confirm that the chemical weapon proliferation combating system, which receives the highest marks of all the WMD categories, must not be viewed as fully infallible. This also pertains to the protection of important facilities viewed as potential targets for a chemical attack (chemical terrorism). Places where huge numbers of people are present simultaneously and air circulation is forced (railway and underground stations, sports venues etc.) are particularly susceptible to this type of attacks. The abovementioned examples also prove how much attention the international community pays to every incident of using or trading in hazardous substances and how hard it is to prove such activity in a manner which raises no doubts.

The most recent nuclear weapon agreement is the Treaty on the Prohibition of Nuclear Weapons (TPNW), adopted on 7 July 2017 during the 72nd session of the United Nations General Assembly. The Treaty preamble particularly emphasizes the humanitarian, health-related, legal and environmental effects stemming from the presence of nuclear weapons in the world and their possible (including unintended) use. The adoption of the Treaty raises an analogy with the Humanitarian Impacts of Nuclear Weapons Initiative (the Humanitarian Initiative), which was announced during the NPT Preparatory Committee conferences in 2013 and 2014. It was supported by 155 countries, while five states objected — the latter are the permanent members of the UN Security Council and possess nuclear weapons. The difficulties accompanying TPNW acceptance were signalled already by the voting results regarding a resolution by the UN Security Council on TNPW negotiations (December 2016). Though the resolution itself was eventually passed, as many as 30% of states voted against it or abstained from voting.

The controversy surrounding TPNW from the very beginning is well reflected by the voting result: 122 states voted for the Treaty, one (the Netherlands) voted against, one (Singapore) abstained from voting and 69 refused to vote. It is characteristic that the latter group included all the states possessing nuclear weapons and the North Atlantic Alliance Member States except the Netherlands (which voted against). One must add that TPNW has to be ratified by at least

[68] https://www.wprost.pl/swiat/10107516/korea-polnocna-przekazywala-syrii-materialy-do-tworzenia-broni-chemicznej-onz-opracowalo-raport.html (accessed: 4.07.2019).

50 states to enter into force. Thus far, it has been ratified by only 13 states. The comprehensive obligation not to "develop, test, produce, manufacture, otherwise acquire, possess or stockpile nuclear weapons or other nuclear explosive devices" or to possess, transfer, use or threaten to use them[69] is a truly lofty goal. What has prevented it from winning widespread approval? This question seems justified, especially because the nuclear weapon elimination idea is already 73 years old: the first resolution of the UN General Assembly on this matter was passed on 24 January 1946.

The lack of a compromise regarding the treaty may be justified in a simplifying manner by the different views of the individual countries, especially nuclear states, on the role of this weapon category in their own (or their allies') military doctrines and the current progress of the disarmament process. The stances of the United States, Russia and NATO Member States are crucial in this case. The United States, like Great Britain and France, believe that the vision of a world free from nuclear weapons is presently unrealistic. The most common argument cited to support this thesis is the nuclear programme development in North Korea. An alternative for the Treaty on the Prohibition of Nuclear Weapons is the involvement of the United States in advocating the Nuclear Non-Proliferation Treaty.[70] Russia believes that TPNW is "formulated one-sidedly and directed against it."[71] According to Russian Minister of Foreign Affairs Sergey Lavrov, "the possibility of a complete nuclear disarmament exists only on condition that all countries, including nuclear weapon owners, are provided with equal, indivisible and full-scope protection."[72] The stance of the North Atlantic Alliance, presented in October 2017 by Secretary General J. Stoltenberg, comes down to a statement that "the Treaty on the Prohibition of Nuclear Weapons does not bring us closer to our goal — a world without nuclear weapons. It can actually threaten the progress we have made throughout the years in the field of nuclear disarmament and non-proliferation."[73] It is interesting that such an opinion was expressed directly after awarding the Nobel Peace Prize to an organisation named International Campaign to Abolish Nuclear Weapons (ICAN).[74] The No-

[69] *Treaty on the Prohibition of Nuclear Weapons*, art. 1 — http://www.icanw.org/wp-content/uploads/2017/07/TPNW-English1.pdf (accessed: 12.07.2019).

[70] *Statement by UN Ambassador N. Haley of 27 March 2017* — https://www.polsatnews.pl/wiadomosc/2017-03-27/rozmowy-onz-o-zakazie-broni-atomowej-bez-usa-wielkiej-brytanii-i-francji/ (accessed: 20.06.2019).

[71] *Statement by Russian Minister of Foreign Affairs Sergey Lavrov of 20 January 2018* — https://zmianynaziemi.pl/wiadomosc/usa-buduje-nowe-bomby-atomowe-rosja-odmawia-podpisania-traktatu-o-eliminacji-broni (accessed: 12.06.2019).

[72] Ibidem.

[73] https://www.tvp.info/34294949/szef-nato-z-rezerwa-o-traktacie-onz-o-zakazie-broni-jadrowej-nie-zbliza-nas-do-celu (accessed: 12.06.2019).

[74] ICAN is an association of non-governmental organisations conducting a campaign to support the actions aimed at a comprehensive ban on the possession, production and stockpil-

bel Committee stated that the organisation had received the prize "for its work to draw attention to the catastrophic humanitarian consequences of any use of nuclear weapons and for its ground-breaking efforts to achieve a treaty-based prohibition of such weapons."[75]

The most important cause of the limited results achieved by the activities concerning WMD proliferation prevention and elimination is the impossibility of conducting effective verification and control of the adherence to international agreements. The most elaborate control mechanisms concern the Convention on the Prohibition of the Development, Production, Stockpiling and Use of Chemical Weapons and on their Destruction, called the Chemical Weapons Convention. Their functioning is related to the activity of the Organisation for the Prohibition of Chemical Weapons (OPCW), which is the executive authority for the convention. Beside permanent supervision of the chemical weapon stockpile in the countries which have declared its possession as well as of the destruction of TWA and their production facilities, the OPCW monitors the industrial activity of the states which are parties to the convention regarding chemical compounds which could be used to manufacture chemical weapons.

On the contrary, the Convention on the Prohibition of the Development, Production and Stockpiling of Bacteriological (Biological) and Toxin Weapons and on their Destruction, referred to as the Biological Weapons Convention, does not offer control mechanisms to check whether the biological weapon production ban is observed, analogously to what OPCW does. This means that the parties are not obliged to declare their biological agents or toxins used in legal activities. At the same time, the convention permits research on the defence against biological agents, which complicates the verification of the adherence to its provisions. Many diseases are endemic, so research i.a. on the plague, anthrax or tularaemia may be justified and constitute a pretext for prohibited activities.

Regardless of the presented conditions, one should pay attention to selected operational features of biological weapons which are particularly important to terrorist organisations and states interested in their possession e.g. as an alterna-

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ing of nuclear weapons. It includes over 460 partners from over a 100 countries. The organisation originated from the activity of International Physicians for the Prevention of Nuclear War (IPPNW) — an international association which established ICAN in 2006 at a congress in Helsinki. IPPNW was established in 1980, allegedly at the grass roots level, in order to prevent the hazards related to a nuclear war outbreak and strive to abolish this weapon altogether in the world. However, it is difficult to accept the association's goals and the motives behind its establishment with the passing of time, especially after taking into account the fact that one of its founders was Evgeny Chazov, PhD, a scientist from the Soviet Union Cardiological University and a personal physician of the subsequent Soviet Union leaders: Brezhnev, Andropov and Chernenko. See more in: J. Wojciechowski: *Pokojowy Nobel 2017 a broń jądrowa.* "Biuletyn CSOPBMR" 2017, nr 4.

[75] https://www.newsweek.pl/swiat/spoleczenstwo/pokojowa-nagroda-nobla-2017-ican/2gzcych (accessed: 12.06.2019).

tive to nuclear weapons or elaborate conventional forces of a potential enemy. Biological weapon production entails a certain risk, but it is easier, cheaper and faster than the production of other WMD types for a number of reasons. Another important factor is the great diversity of micro-organisms, which are classified as: bacteria, viruses, fungi (excluding mushrooms), algae and protozoa.[76] The Appendix to the Polish Act of 5 December 2008 on the prevention and control of infections and infectious diseases in people[77] includes 59 medical conditions and biological pathogens, while the list of the most dangerous pathogens according to NATO standards contains 15 micro-organisms and toxins.

The Non-Proliferation Treaty, which has been mentioned many times in this article and still constitutes the basis for the proliferation combating system regarding this weapon category, is implemented *via* NPT Review Conferences organised every five years. Due to the inalienable right to use nuclear energy for peaceful purposes (art. 4 of the NPT), the treaty entrusts the supervision of this activity to the International Atomic Energy Agency (IAEA). Still, one must remember that the remaining agreements listed in the article, the CTBT and the TPNW, have not entered into force. Consequently, the supervision and control procedures provided for in the agreements remain in the planning phase.[78]

Beside disarmament agreements, other important manifestations of the international community's activities to combat proliferation are so-called non-proliferation initiatives and export control regimes. Generally speaking, international regimes include sets of "principles, norms, rules and procedures concerning decision making which are characterised by convergent expectations of entities in a given field of international relations."[79] These are less formal because they are not based on legally binding agreements. The purpose and scope of their impact is clearly defined since it stems from the hazard perception by the states participating in these initiatives.

The largest group (100 countries) belongs to the Proliferation Security Initiative (PSI), also called the Krakow Initiative because it was announced by President G. Bush at the Wawel Royal Castle in Krakow. It aims at preventing the smuggling of weapons of mass destruction and components used in its manufacture. The universality indicators of the remaining initiatives reach diversified values: 85% for the Global Initiative to Combat Nuclear Terrorism (GICNT)

[76] *Podstawy mikrobiologii lekarskiej. Podręcznik dla studentów.* Red. L. Jabłoński. Warszawa 1979, p. 11.

[77] Polish Act of 5 December 2008 on the prevention and control of infections and infectious diseases in people (Dz.U. of 2008 no. 234 item 1570).

[78] The CTBT anticipates establishment of the Comprehensive Nuclear-Test-Ban Treaty Organisation, while TPNW provision implementation will be supervised by the International Atomic Energy Agency. However, this will require concluding additional detailed agreements.

[79] S. Krasner: *Structural Causes and Regime Consequences: Regimes as Intervening Variables*. In: *International Regimes*. Ed. S. Krasner. Ithaca 1983, p. 1—2.

and 11% for the Non-Proliferation and Disarmament Initiative (NPD) and the Vienna Group of Ten.[80] The main objective of the export control regimes is to lay down export standards for dual-use products, i.e. those serving military and civilian purposes, which can be applied in WMD production. The regimes include drafting so-called control (threshold) lists which are regularly updated and constitute the basis for controlling the flow of prohibited materials and exchanging information between the member states. The most important regimes are: the Zangger Committee, the Nuclear Suppliers Group (NSG), the Missile Technology Control Regime (MTCR) and the Wassenaar Arrangement.[81] The average number of participants in the abovementioned forums is 34.

Conclusions

The second decade of the 21st century is coming to an end. It will go down in history as an exceptionally stormy period with an intensification of various events, phenomena and processes which have had an unfavourable influence on the security of countries and regions as well as supraregional security.

At the beginning of the present decade, a total of 81 state, non-state and internal conflicts were waged worldwide. At the end of 2018, that number increased to 162,[82] which was one of the highest values since 1975, when the register was started; the greatest increase (57%) concerned state conflicts. Some of them take place in the territories where weapons of mass destruction are present, can be

[80] The Global Initiative to Combat Nuclear Terrorism was announced in 2006 by Presidents G. Bush and V. Putin. It gathers 85 countries and aims at preventing nuclear terrorism *via* i.a. tracking the flow of nuclear materials. The Non-Proliferation and Disarmament Initiative aims at promoting the implementation of the arrangements made at the 2010 NPT Review Conference as well as intensifying the disarmament and non-proliferation effort. The Vienna Group of Ten promotes cooperation on the peaceful use of nuclear energy.

[81] The goals of the regimes are as follows: the Zangger Committee (the Nuclear Exporters Committee) aims at establishing a uniform interpretation of the provisions of art. III. 2. of the NPT; the Nuclear Suppliers Group promotes better understanding and support of nuclear export control (especially concerning dual-use goods); the Missile Technology Control Regime wishes to ensure the non-proliferation of missile goods and technologies as WMD delivery means; the Wassenaar Arrangement strives to increase transparency and responsibility in the transfer of conventional weapons and dual-use assets. Based on: *Zobowiązania międzynarodowe Polski w dziedzinie kontroli eksportu — informacje ogólne* — https://www.msz.gov.pl/pl/polityka_zagraniczna/polityka_bezpieczenstwa/nieproliferacja_broni_masowego_razenia/najwazniejsze_porozumienia_i_inicjatywy_z_zakresu_nieproliferacji_i_rozbrojenia_bmr/page_30286 (accessed: 14.07.2019).

[82] Statistical data and terminology based on: the *Uppsala Conflict Data Programme Conducted at the Uppsala University* — https://ucdp.uu.se/#/encyclopedia (accessed: 15.07.2019).

transferred (manufactured) or remain within the range of the delivery means enabling their operational use. A combination of these facts justifies the thesis that the contemporary risk posed by this incredibly elaborate category of combat assets has increased. This is confirmed by the WMD and delivery means development programmes in various states as well as multiple instances of chemical weapon use in recent years.

Ten years ago, the hazard related to WMD (CBRN incidents[83]) was perceived first and foremost in the light of their use by non-state organisations, i.a. terrorist groups. The possible effects of releasing hazardous substances into the environment were also a source of concern. The possible military application was considered in extremely rare cases. Weapons of mass destruction, especially nuclear ones, were usually treated as Cold War relics. That conviction was strengthened by the faith in the effectiveness of bilateral (the United States — Russia) and multilateral agreements aimed at arsenal reduction and supervision as well as elimination of certain weapon types. Those hopes have proved futile. Proliferation (both horizontal and vertical) remains an indisputable fact which clearly proves the limited effectiveness of international agreements. One must also highlight that recent years have seen an increase in the significance of nuclear weapons in the tactical configuration as an asset allowing its owner to exert pressure in international relations or constituting a deterring element in the owner's (or its allies') military doctrine. A consequence of this is nuclear weapon modernisation in many countries classified as nuclear states (under the NPT). It commenced recently and is scheduled for implementation in the oncoming years. Another disturbing phenomenon is the effort made to acquire this weapon by the states which are not parties to the NPT.

The topicality of the hazards related to the described problems and the great dynamics of the current events are proved by the fact that certain events, such as the meeting of Trump and Kim Jong Un in Panmunjom, a village located in the Korean Demilitarised Zone, or Iran's announcement of resuming the uranium enrichment programme, took place when this article was already being written. The topicality of the subject and its significance to the shape of the present and future international relations remain indisputable. All of this constitutes an inspiration to discuss these problems in a broader form which would permit a presentation and detailed description of the issues not included in this article for obvious reasons.

[83] CBRN incident — every case related to the use of chemical, biological, radiological or nuclear weapons or CBRN devices, appearance of the action agents of such weapon or release of toxic industrial agents into the environment. See: M. Młynarczyk: *Obrona przed bronią masowego rażenia w operacjach połączonych DD/3.8(A)*. Bydgoszcz 2013, p. 7.

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About the author
Col. Włodzimierz Wątor, PhD — Head of the Chemical, Biological, Radiological and Nuclear Training Centre (War Studies University).

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The perception of the journalist's profession in the context of fake news dissemination by official and social media

Postrzeganie zawodu dziennikarza w kontekście rozpowszechniania fałszywych wiadomości przez media oficjalne i społecznościowe

Dariusz Krawczyk*

Abstract

The majority (57%) of Polish press, radio and TV journalists participating in a survey conducted in 2019 considered the dissemination of fake news to be a common phenomenon. The mass scale of this process was also noted by the majority (88%) of communication experts participating in an international research project also carried out in 2019. The threat of misinformation has become one of the elements that shapes the perception of the profession's prestige by journalists, and also influences the self-esteem of professionalism. A comparison with surveys conducted in 2015 and 2016 showed that the percentage of journalists perceiving high (from 13% to 38%) rather

Abstrakt

Większość (57%) polskich dziennikarzy prasowych, radiowych i telewizyjnych uczestniczących w ankiecie przeprowadzonej w 2019 r. uznało rozpowszechnianie fałszywych wiadomości za zjawisko społeczne. Masową skalę tego procesu zauważyła także większość (88%) ekspertów ds. komunikacji uczestniczących w międzynarodowym projekcie badawczym przeprowadzonym również w 2019 r. Zagrożenie dezinformacją stało się jednym z elementów kształtujących postrzeganie prestiżu zawodu przez dziennikarzy. Wpływa ono także na samoocenę dziennikarską pod względem profesjonalizmu. Porównanie z ankietami przeprowadzonymi w 2015 r.

* Expert witness in the field of social communication and management; (e-mail: d.krawczyk@olpress.pl); https://orcid.org/0000-0003-1823-0309.

than low (from 7% to 17%) social recognition for their profession increased significantly. However, their belief in a high level of professionalism decreased (from 60% to 49%), and the number of respondents reporting a noticeable lack of competence and substantive preparation among journalists (from 16% to 35%) increased.

Key words: journalist, fake news, official media, social media, press, radio, professionalism

i 2016 r. pozwoliło stwierdzić, że odsetek dziennikarzy postrzegających wysokie (z 13% do 38%), a nie niskie (z 7% do 17%), społeczne uznanie ich zawodu znacznie wzrósł. Jednocześnie ich przeświadczenie o wysokim poziomie profesjonalizmu spadło (z 60% do 49%), a liczba respondentów — zgłaszających zauważalny brak kompetencji i merytorycznego przygotowania dziennikarzy w kontekście rozpowszechniania fałszywych wiadomości przez oficjalne i społecznościowe media — wzrosła (z 16% do 35%).

Słowa kluczowe: dziennikarz, fake news, media oficjalne, social media społecznościowe, prasa, radio, profesionalizm

Introduction

The aim of the article is to present a change in the perception of the journalist's profession based on a survey of journalists conducted in 2019, and its comparison with two similar analyses conducted in 2015 and 2016. The study may constitute a contribution to research on the condition of the journalistic environment in a situation in which the determinants of professionalism — craft, knowledge and ethics[1] — are currently juxtaposed with the consequences of technological progress and political or social changes, as well as "the role of economic pressure, which affects the quality of Polish journalism and largely contributes to the erosion of journalism."[2] The social reputation of the profession is not only affected by factors directly resulting from the processes of the functioning of the media market, such as progressive and multifaceted convergence. The multimedia character of work, combined with employees' multitasking, undoubtedly influences the self-assessment of the profession. A new challenge for journalists and institutional entities in the media market, however, is the phenomenon of disseminating disinformation. The threat level verification, in this respect, was also the subject of statements by journalists who participated in the survey. The

[1] J. Olędzki: *Polish Journalists: Professionals or Not?* In: *The Global Journalist. News People Around the World*. Ed. D.H. Weaver, W. Wu. New York 1998.

[2] B. Dobek-Ostrowska, P. Barczyszyn, A. Michel: *The Change in Journalism. Professional Culture of Polish Journalists (quantitative research)*."Media Studies" 2013, No 1, p. 26.

position of Polish journalists was juxtaposed with the opinions of participants in an international research project devoted to diagnosing the universality of fake news distribution and recommended forms of counteraction. In this context, the question was also posed whether the flood of manipulation in the communication space of official and social media is an opportunity or a threat to the traditional understanding of journalism. The journalists and communication experts who participated in the opinion polls were asked to determine the actual state of affairs in the perception of the profession's prestige, the professionalism of its representatives and the threat of misinformation. On this basis, the issue of the social reputation of journalists, the impact of spreading disinformation on the functioning of the media and the issue of journalistic diligence in the context of legal restrictions on freedom of expression were also discussed.

The prestige of the journalist profession in the eyes of media market professionals

A survey aimed at evaluating the social reputation of the journalist profession was conducted in 2019 among the employees of TV stations, radio stations, press publishers and Internet broadcasters.[3] People employed in these editorial offices were asked to assess the prestige that, in their opinion, the journalist's profession in Poland currently enjoys. Most respondents expressed the opinion that the reputation of people connected with the world of media is average (44.4% of responses). The next greatest percent was of respondents who were convinced of its high rating (38%). The smallest percent was of those who believed there is a low level of social respect for their profession (17.4%).

The next stage of the survey was to determine the changes in journalists' own perception of their profession. In this case, the largest group of participants expressed the opinion that the authority of the profession was growing (41.2%). The second largest percent held that their prestige is decreasing (38%). The remaining respondents (20.8%) did not express a clear view on the subject.

[3] The research was carried out on 16th February 2019 in Zabrze during a community meeting of mass media employees with the participation of journalists from the following TV stations: TVP Info, TVN 24, TVN, Polsat News, TTV, Superstacji, Polsat, TVS, TVP3 Katowice, TVZ and TV Imperium, and journalists from the following radio stations: RMF FM, TOK FM, Jedynka (Polish Radio), Czwórka (Polish Radio), Polskie Radio24, Polskie Radio Katowice, Polskie Radio Kraków, Radio Piekary, Radio CCM, and Radio FEST. Also participating were press journalists from "Gazeta Wyborcza", "Super Express" and "Trybuna Górnicza". A total of 63 journalists took part in the author's research.

When addressing the issue of competence to 'professionally practice a speciality[4], i.e. in the case of journalists, to deal with 'editing, creating or preparing press materials'[5], respondents most often reported that journalists are professionally prepared for work[6]. This opinion was expressed by almost half of the respondents (49.2%). About one third of respondents (34.9%) presented the opposite view, claiming that journalists perform editorial duties in an inefficient, inexpert or dilettantish manner. The rest did not give a clear answer.

Comparative analysis with test results obtained in 2016

The obtained results should be compared with the results of a similar study conducted in 2016.[7] At that time, about half of the respondents (51%) claimed that journalists are professionals, while the percentage of respondents giving a negative assessment of their colleagues did not differ significantly from the results obtained in 2019 (34%). Therefore, the belief that journalists possess appropriate qualifications did not undergo any fundamental change between the two studies.

On the other hand, in the 2016 study, the vast majority of respondents, when assessing the level of social approval and trust that journalists in Poland enjoy, claimed that it is 'average' (71%). The second most frequent response was that their prestige is high (17%), and the least frequent was that the prestige of the profession is low (11%). The distribution of deposits in 2019 remained the same, but the proportions were reshaped. The responses positioning the perception of prestige in the 'medium' range decreased significantly, i.e. by 27 percentage points (44% in 2019 compared to 71% in 2016). The number of 'high' prestige responses increased radically by 21 percentage points (38% vs. 17%), and the number of responses assessing 'low' prestige increased by 6 percentage points (17% vs. 11%).

Different trends were noted in the assessment of social transformations in the perception of journalists' prestige. The dominance of the pessimistic assump-

[4] Definition of the term "professionalism" in the Dictionary of the Polish Language PWN — https://sjp.pwn.pl (accessed: 6.03.2019).

[5] Pursuant to Article 7 of Act 2(5) — the *Act of 26 January 1984, the Press Law Sets Out the Scope of the Journalist's Duties* ("Journal of Laws" 1984, No 5, item 24).

[6] More on the professionalism of journalists and their professional culture: B. Dobek-Ostrowska: *Polish Media System at the Crossroads. Media in Politics, Politics in the Media*. Wrocław 2011, p. 23—62.

[7] The author's research was conducted in Zabrze on 10th December, 2016. It involved 70 journalists from the local, regional and national press, regional and national radio stations, and TV stations and Internet broadcasters (regional and national centres of private and public media). The study covered various aspects of the profession and their influence on the perception of its prestige.

tion that journalists' authority is decreasing (59% in 2016) was replaced by the vision of growing esteem and respect (41% in 2019). The change in mood is documented by the scale of the difference: responses claiming a positive social perception of the profession increased by 27 percentage points (from 14% to 41%), while responses claiming a negative perception decreased by 21 percentage points (from 59% to 38%).

Comparative analysis with test results obtained in 2015

A survey of similar scope was also conducted in 2015. At that time, journalists from the press, radio, television, Internet broadcasters and news agencies[8] most often claimed that the social reputation of the profession was 'average' (79%), followed by 'high' (13%), and the then 'low' (7%). The structure of responses remained the same as in the other surveys. But in 2015, the number of responses that placed prestige at the 'average' level, in comparison to 2019, was higher by 35 percentage points. On the other hand, over four years, the number of responses reporting 'high' authority increased by 25 percentage points, and 'low' by 10 percentage points. Thus, the opinions of the surveyed journalists, who more and more often had a decided opinion on the reputation of their profession, were becoming polarised. But they expressed more often a clearly positive view of the public reputation of their profession than a clearly negative one.

The assessment of the tendency to change the perception of prestige reveals that in 2015 the majority of respondents were convinced of its decline (61%), which is comparable to the response in 2016 (59%). Only 5% of the surveyed journalists observed an increase in respect for their profession in 2015 (a year later this figure was 14%). Meanwhile, the 2019 research project has brought to light a clear improvement in mood: the thesis of growing authority for the profession showed a 36 percentage point increase, while the view that social authority is decreasing saw a 31 percentage point decrease.

In 2015, the majority of the survey participants (60%) expressed the opinion that Polish journalists are professionals. The opposite opinion was expressed by 16% of respondents. A year later, the positive assessment of the level of competence had dropped to 51%, while the negative one had increased to 34%. This trend was confirmed by the results of 2019, when the percentage of positive views dropped to 49%, while that of negative ones rose to almost 35%.

[8] Author's research conducted in December 2015 during a community conference in Zabrze with the participation of 60 journalists representing TV stations (including TVP 1, TVP 2, TVP Info, TVN, TVN 24, Polsat News, Superstacja, and regional branches of TVP), nationwide radio stations (including Polish Radio, RMF FM), newspapers, weekly and monthly magazines (including "Fakt" and "Forbes"), the Polish Press Agency, and Onet.pl portal.

The threat to the communication system posed by the dissemination of fake news

The high self-esteem regarding professional competences of the journalistic community is worth correlating with the growing threat to the system of social communication involving mass media participation, which is represented by the dissemination of fake news. The majority of journalists participating in the 2019 survey claimed that information manipulation, in their opinion, is a common phenomenon. This was the position of over 57% of media professionals. Moreover, more than half of the respondents also saw this as an opportunity for traditional broadcasters who operate under the Press Law.

Journalists identified a flood of manipulation, misrepresentation and inaccuracies connected with the operation of social media — in which the author of some disseminated content can easily turn into a commentator, and where the recipient might become a reviewer and at the same time a source of further dissemination. In the opinion of journalists, the limited scope of formal tools of supervision, verification and credibility of these communications results in the possibility of increasing public trust in institutional mass media, which will distribute news prepared by journalists, applying the principles of reliability and diligence, as is required by the Press Law. Thus, a media audience may turn to professional editors in search of objective news, instead of seeking sensation amid the content that is disseminated by various types of unauthorized profiles, channels and websites.

Some of the optimism that appears in the responses of Polish journalists was shared by participants in an international research project conducted in 2019, which was aimed at determining the impact of fake news on social communication.[9] Forty-four percent of them perceived a wave of information manipulation as an opportunity to regain the traditional media audience. On a global scale, however, the scope of fake news fabrication was assessed by communication experts as being much more serious than it appeared in the eyes of Polish journalists. As many as 88% of people taking part in the international project emphasized the ubiquity of fake news. What is more, unlike in national studies, 44% of respondents said the official media was also used as a tool for spreading disinformation.

[9] The project was addressed to people who are partners of the association involved in the promotion of cyberspace for educational purposes. Eighteen experts from the USA, Great Britain, Pakistan and Kenya participated in the author's research project which was conducted from 26 March to 9 May 2019.

Reasons for fake news distribution by journalists

The survey participants believed that journalists and the media employing them, for various reasons, were involved in the dissemination of manipulative news. Expressing the opinion that it poses a threat to journalism, the respondents located the reason for this practice both in phenomena affecting the internal functioning of mass media and in the interference from the external environment.

In the first category, attention was drawn to the internal sphere understood as individual and collective characteristics of journalists, including, among others, 'lack of professional education,'[10] 'partiality of journalists,' 'taking care of private interests at work,' 'herd reactions of journalists, who take up the suggested topics in groups,' 'poor quality of journalists' 'work,' and 'journalists' ignorance.'

Other elements of the internal sphere, these not attributed to employees of media institutions but to publishers and media owners, were the following: 'orientation on "clickability" and various forms of tabloidization,' 'transferring to the world of formal media the communication behaviors typical of social media', 'buying journalistic services by international business, which closely cooperates with global media corporations,' and(difficult to classify) 'excessive and uncontrollable freedom of the press.'

The external threat to the system of social communication, and thus to the mass media, which was most often identified involved succumbing to influence and pressure at the interface between the media and politics.[11] The respondents directly called it 'politicization' or 'exerting influence on journalists by politicians,' 'political pressure on media,' and 'use of media in conflicts of political parties.' The next stage of the problem was indicated by such statements as 'progressive authoritarianism and restriction of media freedom,' 'interference of political structures in the functioning of the media,' and even 'various manifestations of censorship applied by the state.'

An external threat was also perceived in the irreversibility of the changes among the media audience. These include, for example, 'the replacement of mass media with the widespread use of information drifting on the Internet'. The defensive reaction of the institutional media is to fight for the attention of the public through a greater level of tabloidization. However, it is easy to cross the border between a programme line providing the public with access to attrac-

[10] The material contains direct quotations from the statements of the participants in the international research project.

[11] It is worth mentioning a comprehensive monograph devoted to Polish journalists (from before the period of political transformation) who, despite the politicization of the media, distinguished themselves by their professionalism: J.L. Curry: *Poland's Journalists: Professionalism and Politics*. Cambridge 1990.

tively prepared news and entertainment at a level acceptable to most audiences, and the colouring of reality or disinformation, which in turn may cause 'loss of press reputation due to the publication of fake news.'

Forms of counteracting disinformation

The surveyed participants of the international research project were asked to provide effective — in their opinion — forms of fighting against fake news. On this basis, it is possible to formulate a simple typology of preferred areas for corrective action that can be taken by: (1) the media, (2) the activity of state structures, (3) legal regulations, (4) communication education in order to improve media audience awareness.

The participants of the survey proposed strengthening internal control in relation to editorial structures, which concerns not only the elimination of prohibited acts committed individually by journalists (e.g. publishing false data in exchange for material or personal benefit), but also the increase in the scale of unintended errors disclosure (e.g. misrepresentations resulting from misinterpretations or ignorance of the case context) or intentional manipulations (e.g. fabrications by a source of information — in this case the editorial office is a victim). Management control should also improve the organisation of the editorial office through 'establishing and enforcing the consequences for journalists who present their opinions as facts' and 'making journalists give clear information without comments.'

The presentation of actions that can be taken by the media on their own was accompanied by declarations of the need for greater state interference in ensuring security in the process of disseminating information. Postulates in this category included improving the effectiveness of control activities and the creation of new legal regulations. These took the form of e.g. 'effective sanctions for disseminating fake news,' 'increased state control over official (institutional) media,' 'supervision of state institutions over the press, radio and television.' It was argued that 'there is a need for a stricter law to deal with entities and persons spreading fake news — not only financial sanctions, but also criminal liability.' Further statements were part of a similar form of narrative: 'strict criminal regulations should prevent journalists from being abused. Hope is to increase control over institutional media,' 'it is necessary to introduce regulations that control what is reported in the press, radio and television.' Chances to eliminate fake news from the public debate were also seen in the 'introduction of penalties for journalists abusing the freedom of speech, especially those who use lies.' This is supplemented by a similar statement: 'there should be penalties for professional journalists who knowingly abuse their rights and manipulate people using lies in the name of freedom of expression.' The authors of these as-

sessments stressed the need for effective measures to prevent the dissemination of misrepresentation, manipulation or entirely fabricated content, even at the cost of possible restrictions on freedom of expression, which may result from excessive state interference in the freedom of the press.

The next area of counteracting disinformation should, according to the participants of the research project, be an increase in the active involvement and awareness of the media audience. This may take on a repressive form: we should 'discredit journalists responsible for fake news; they cannot enjoy authority' and 'it is necessary to disclose, show and condemn media companies that manipulate facts, especially those that are financially connected with political parties.' Recipients' actions can be reactive, in the form of 'a broad campaign counting disinformation in individual media.' They may also involve articulating expectations and taking co-responsibility for the choice of consumed content: 'The public must demand truthful information from the media. We don't have to buy newspapers that sell fake news. We do not have to listen to such radio stations or watch TV that lies. Everyone, however, must try to find different sources of information. Responsible and reliable. Or, at least, diverse. Then it is possible to get a more balanced picture of reality.' This trend includes a focus on independent, niche or civic broadcasters: 'the only hope is that readers will choose independent publishers and support journalists who are not connected with media concerns.'

Postulates addressed to the public indicate the need for media education, because 'it is important to change the way in which information is received. People should do it consciously, not passively.' You have to 'recognize the topics yourself and form your own opinions.' The following also counts: 'integration instead of polarisation. Getting to the facts together is better than trusting the information in the official media.' In this context, however, attention also must be drawn to the risks of misinformation in social media, as 'you cannot believe everything on Facebook and others' and, in the case of traditional media, 'conscious use of social media' is important.

Journalistic diligence and legal limits to freedom of expression

In analysing the results obtained in the above mentioned studies, it is worth noting a tendency to see the solution to the disinformation problem in an extension of the scope of punishable acts or increase of already existing criminal liabilities. It should be stressed that there are potential threats in actions aimed at improving the quality of public debate through the repressive elimination of untrue, manipulated or inaccurate content. The restriction of free speech is a sig-

nificant problem. It is worth noting that in Poland the source of legal protection of free speech is the Constitution of the Republic of Poland, which states that 'everyone is guaranteed the freedom to express their opinions and to obtain and disseminate information.'[12] The same article also prohibits preventive censorship of social media and licensing of the press. As researchers emphasize, 'this provision ensures three freedoms that constitute, in the constitutional sense, the freedom of expression'. Despite the fact that the legislation did not use the term 'freedom of speech' literally, the relationship between it and the 'partial freedoms' is clearly emphasized in the provision by the jurisprudence of the Constitutional Tribunal. In the justification of the judgment of 5 May 2004 (ref. P 2/03), it was stated that 'in the Polish Constitution the principle of freedom of expression is regulated by Article 54 (1), in which three separate but related and interdependent individual freedoms are expressed. These are: freedom of expressing one's views, freedom to obtain information and freedom to disseminate information.'[13] However, the protection of personal rights may be a barrier to freedom of expression. It is worth mentioning that the basis for the right to legal protection of one's honour is likewise the Constitution of the Republic of Poland, in which it is written, inter alia, that 'inherent and inalienable human dignity is a source of freedom as well as the root of human and civil rights. It is inviolable, and its respect and protection is the duty of public authorities,'[14] and which also guarantees that 'everyone has the right to legal protection of private and family life, honour and good name, and to decide about his or her personal life.'[15] Thus, in the opinion of the Supreme Court, 'the rank of both rights and the level of protection afforded to them is equal, which means that none of them may be given priority and none of them is absolute.'[16]

Therefore, to demand the multiplication of state control systems over the mass media activities and the creation of further supervision and repression tools seems to go too far. All the more important is the fact that 'in the context of the press aims and the tasks of journalists, there are sometimes circumstances justifying the need to present certain socially important content to a wide audience, in situations that may repeal the unlawfulness of the violation of personal rights belonging to the protagonists of such publications. Freedom of expression is one of the basic foundations of a democratic society and one of the basic conditions

[12] Article 54, paragraph 1 of the Constitution of the Republic of Poland: *The Freedom to Express Opinions, to Acquire and to Disseminate Information Shall be Ensured to Everyone*. "Journal of Laws" 1997, No 78, item 483.

[13] W. Mojski: *Konstytucyjna ochrona wolności wypowiedzi w Polsce*. Lublin 2014, p. 48.

[14] Article 30 of the Constitution of the Republic of Poland.

[15] Article 47 of the Constitution of the Republic of Poland.

[16] Resolution of the composition of seven judges of the Supreme Court of 18 February 2005, III CZP 53/04. Source: database of decisions of the Supreme Court portal at www.sn.pl (accessed: 26.06.2019).

for its development and the self-fulfilment of individuals.'[17] It is extremely important to separate conscious disinformation from the consequences of errors in the adjudication of freedom of speech. Tools designed to both counteract and combat fake news can be effectively used to restrict freedom of expression in order to secure the rights protected by law. In extreme cases, this means a reactivation of censorship. Obviously, it is also impossible to accept uncritically the publication of press materials containing fake news, which is contrary to the statutory requirement of diligence and reliability. In the case of this type of manipulation or slander, it is worth recalling the 'position of the Supreme Court, stating that the right to criticism, which also applies to journalists, must not turn into the formulation of invective and slander against state officials. The activities of any state body may be assessed by journalists, and the public has the right to be informed about possible irregularities. This does not release a journalist from the requirement that his statements should be impartial, especially when they relate to facts.'[18] The need for a cautious approach to the problem of legal responses to fake news, combined with being careful in taking preventive measures by the state apparatus, as well as the strengthening of criminal liabilities, point to the enormous potential of education. These are the next spheres of possible reaction, indicated by the participants of the international research project, placed this time on the side of the media audience and press market players.

The optimization of internal editorial procedures aimed at the disclosure and elimination of fake news before its dissemination should be considered exceptionally desirable. Greater sensitivity on the part of journalists and those who decide to publish content[19] can improve the situation, at least in terms of finding unintentional errors and inaccuracies more effectively. A difficulty, or even serious obstacle, in implementing this recommendation may be editorial activity which is conducted in the manner of tabloid journalism, aimed at generating sensation and emotions among the audience, since certain colorations of reality are an immanent quality of this kind of journalism. The risk of destabilising the media system posed by the prevalence of fake news could, however, affect the attitude of decision-makers in editorial offices so that they may change the rules of their functioning.

However, the greatest potential for counteracting disinformation is probably to be found on the part of the media audience. Civil opposition to the dissemination of untruth may influence business decisions made by media corporations

[17] Judgment of the Court of Appeal in Łódź dated 11 June 2015. Case file I ACa 1820/14. Source: Portal Orzeczeń Sądów Powszechnych — orzeczenia.ms.gov.pl (accessed: 26.06.2019).

[18] J. Sobczak: *Wolność słowa w kampaniach wyborczych*. Toruń 2016, p. 164.

[19] Pursuant to Article 7 of the Press Law, these are the editors, i.e. journalists who decide or co-decide on the publication of press materials, as well as the executive editor who has the authority to decide on the overall activity of the editorial office.

in a much more radical way than a sense of threat to the credibility of specific editorial offices. However, social control, the stigmatisation of broadcasters who use fake news and their consequent removal from the area of used media require a high level of communication education — probably much higher than the existing one, because still in some audiences the astonishment caused even by very improbable news is tempered by the reflection that since it was given by television (press, radio, Internet portals, etc.), it certainly must contain at least a grain of truth. It cannot be ruled out, therefore, that a necessary condition for positive changes is universal communication education, which will permit news recipients to consciously trust those broadcasters who are guided by the principles of reliability and journalistic diligence.

Conclusions

The aim of the research was to determine how journalists perceive the phenomenon of the spread of disinformation. More than half of the respondents (57%) thought that it was common. Half of the respondents found this to be a chance for traditional media. According to the majority of respondents, journalists in Poland enjoy growing social authority. On the other hand, the self-esteem of the professionalism of people working for the mass media is systematically decreasing, while the number of journalists perceiving clear shortcomings in the preparation, knowledge and competence in their group is growing. This is the result of the change of economic, technical and social conditions for practising the profession.

The development of communication technologies, the availability of new online tools for information distribution and their use on a mass scale have made it necessary for journalism to take into account in its specificity, first the existence and then the domination of cyberspace in social communication. The natural reaction was an attempt to treat the computer network as another field of exploitation for the commercial activities of media concerns. This also occurred in Poland, where "by introducing fees for access to the websites of dailies and magazines, Polish press publishers drew on the patterns from foreign ones. In 1997, New York's 'The Wall Street Journal' "[20] was the first in the world to introduce a system of paid online subscriptions. However, the virtual market proved to be completely different from traditional distribution of newspapers in paid distribution networks (advertising revenue and copy sales) or free of

[20] J. Bogdańska: *Płatne treści w serwisach internetowych polskiej prasy codziennej.* "Acta Universitatis Lodziensis. Folia Litteraria Polonica" 2018, nr 51, p. 44.

charge (concentration of advertising revenue), and even the functioning of radio and television broadcasters. The specificity of the computer network resulted in a potential new space for media expansion, which has become a threat to some of the existing market participants. Difficulties in achieving profitability for journalistic content available on the Internet were exacerbated by the expansion of social media. The situation in which the recipient of messages could become a reviewer or co-author of subsequent versions distributed on a computer network disturbed the previously existing models of news dissemination. The consequences of technological progress ‘‘for the organization of editorial work were not yet strongly identified and accentuated by journalists during the 2004 survey. However, the passage of time and the development of technology have meant that in 2015, convergence has already had a lasting impact on the way journalists work.’[21] The empowerment of so-called civic journalism and the growth of its social scope were further factors that have influenced the position of professional workers and media collaborators.

The conditions for working as a journalist must also be looked at from a broader perspective.[22] An editorial staff member is subject to various consequences of the convergence process, which may take the form of preparing press releases in multimedia versions, announcing and commenting on them in social media, participating in feedback management, etc. One effect of ownership concentration in the media is a decrease in the financial appeal of this profession (e.g. by the employer taking over copyright to works published in other fields of media belonging to the publisher), and ‘pressure exerted on journalists (mainly economic), reduction of social rights and limitation of independence — these are problems occurring in all editorial offices. It seems that also the owners of media and the management of the editorial office, through their attitude, contribute to depriving journalism of the features of the creative profession.’[23] These factors are not unrelated to the perception of the social reputation that the profession enjoys. What is more, current law does not provide for ‘a requirement for journalists to have a university degree or a practical training, as evidenced by a professional practice. In the light of literature, such education and training is essential for professionals. It seems that the journalist's profession in Poland is at a certain crossroads and it will either fall to the position of an intellectu-

[21] D. Krawczyk: *Zmiany w społecznym postrzeganiu prestiżu zawodu dziennikarza wobec przekształceń rynku medialnego*. W: *Teorie komunikacji i mediów.* T. 9: *Konstrukcje komunikacji mediów*. Red. M. Graszewicz, M. Wszołek. Wrocław 2016, p. 239.

[22] The conditions of contemporary journalism have been described in, among others, the following publication: *Journalistic Role Performance: Concepts, Contexts, and Methods (Routledge Research in Journalism).* Eds. C. Mellado, L. Hellmueller, W. Donsbach (d. 2015). New York 2017.

[23] L. Szot: *Wartości i standardy zawodowe dziennikarza.* "Zeszyty Prasoznawcze" 2016, nr 2 (226), p. 389.

ally efficient hired employee, giving up his or her abilities to an employer, ready to create in accordance with his or her instructions and guidelines, or become a free profession of public trust.'[24] At present, for some candidates, this profession is unattractive due to the need for journalists to be constantly available, the need for significant involvement in the work, the need to acquire competence to operate communication tools and the average level of remuneration. However, for those who perform it, it may be interesting, intriguing, developing, and satisfying, and it might ensure social recognition. This is confirmed by the results of the self-evaluation carried out by journalists. Research into the prestige of the profession revealed a consistent increase in the number of people who believe in its high level (from 13% in 2015, through 17% in 2016 to 38% in 2019, i.e. an increase of 25 percentage points), although there was also an increase in the number of people declaring a decline in social recognition (from 7% in 2015, through 11% in 2016 to 17% in 2019, but this change reached only 10 percentage points). This was at the expense of a decline in the group of media employees who considered their profession's reputation to be average (from 79% in 2015, through 71% in 2016 to 44% in 2019).

Clear tendencies were also observed in the evaluation of the directions of changes in the prestige of the journalist's profession. The percentage of respondents who indicate the increasing authority of the profession is growing (from 5% in 2015, through 14% in 2016, to 41% in 2019, i.e. an increase of 36 percentage points); and the number of reporters who indicate a decreasing prestige is falling (from 61% in 2015, through 59% in 2016, to 38% in 2019, i.e. a decrease of 23 percentage points).

There was also a disturbing, yet consistent decrease in the number of surveyed journalists who indicated that their fellow-journalists are professionals (from 60% in 2015, through 51% in 2016 to 49% in 2019, i.e. a decrease of 11 percentage points). And claims of a lack of adequate level of competence to perform this profession correspondingly increased (from 16% in 2015, through 34% in 2016, to 35% in 2019, an increase of 19 percentage points). Data concerning the assessment of journalists' professionalism should also be included in the need to undertake actions aimed at improving the quality of social communication systems which are currently struggling with the problem of disinformation dissemination. The need to initiate a broad educational program is suggested by an opinion poll on the scale of disinformation in the mass media and social media, conducted among students of journalism and social communication in 2019.[25] Survey participants, although in most cases not active on the media mar-

[24] J. Sobczak, K. Kakareko: *Zawód dziennikarza w obliczu zmian*. "Zeszyty Naukowe KUL" 2017, nr 1, p. 133.

[25] The research into the perception of disinformation was addressed to all students of the last year's full-time studies in social communication and journalism at the University of Silesia in Katowice. It was conducted on 16 May 2019. It was attended by 54 students.

ket, due to their education should have a solid knowledge of the rules and conditions of mass communication. As many as 76% of them declared that the scale of making fake news available is really large. Fifty-five percent of respondents, representing a group of exceptionally conscious recipients of media messages, were convinced of its destructive impact on the functioning and credibility of traditional editorial offices.

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Dariusz Krawczyk, Ph.D., is a member of the Polish Communication Association, member of the Committee on Organizational and Management Sciences of the Polish Academy of Sciences in Katowice, expert witness in social communication and management, and Head of the Social Contacts Department in the City Hall in Zabrze.

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