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## Political-Economic Transnational Behavior: A Case Study of the Polish American Economic Forum

This article presents a case study of the Polish American Economic Forum as an example of public transnational behavior in intertwining economic and political spheres. The organization was formed in 1989, primarily by Solidarity refugees and other contemporary migrants, along with a small number of Polish Americans and WWII émigrés who played salient roles. The migrants utilized cross-national networks and bi-cultural knowledge to create a nonprofit organization to promote investment in Poland's emerging private sector economy, which they also defined as political support for the new government. The transnational networks of these contemporary Polish migrants in the U.S. were simultaneously embedded in both the home and host countries.

**Keywords:** economic transnationalism, political transnationalism, refugees, contemporary Polish migration, Solidarity, collective action, public good

The Polish American Economic Forum (Forum) was organized in Chicago in fall of 1989 for the “promotion of foreign investments in Poland's private sector economy”<sup>2</sup>. This goal of Forum aligned with current U.S. policy – the Support for Eastern European Democracy (SEED) Act, an \$846.5 million aid package designed to “facilitate the transition from state-directed controls to a free market economy”<sup>3</sup>.

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<sup>2</sup> From the Forum promotional brochure *Poland is Open for Business* (Author's private collection). Unless otherwise stated, all material is in the author's personal archive.

<sup>3</sup> H.R. 3402 – 101st Congress: Support for East European Democracy (SEED) Act of 1989. www.GovTrack.us. 1989, <https://www.govtrack.us/congress/bills/101/hr3402> [Accessed 29.11.2017]. The package included \$125 million in food aid, \$240 million in grants to private businesses, up to \$200 million to stabilize the Polish currency, and up to \$200 million in loans to Polish companies import-

Forum also had a political agenda, rooted both in the biographies of the founders and goals of the organization. The founders wrote that Forum was created by:

Polish Americans and individuals who came from Poland after the declaration of martial law in that country in 1981. The latter group was active in the Solidarity movement, and most were granted political asylum in this country. Although now successful in academic and business circles in America, they naturally maintain their relationships with family and friends in Poland, many who are now found at the highest levels of the legislative and administrative branches of government. ...

The goal of Forum's many activities is to help build the economic framework which will encourage the survival of democracy in Poland. ... After 45 years of totalitarian rule, Poland needs the skills and expertise as well as the investment that Americans can impart. The development of many such businesses throughout the country will provide the bridge for Poles who need some economic stability while filling in the latticework of democracy<sup>4</sup>.

A strong market was seen as a foundational and necessary condition for the emerging democracy; and, a democratic state (in the U.S.) provided skills and networks to support the emerging market (in Poland). The market and the state were intertwined. So were the two countries – through the biographies of the Solidarity refugees formerly active in the movement in Poland in 1980–1981, and subsequently successful in academic and business spheres in America with simultaneous links to top officials in Poland's new government made up of Solidarity movement leaders. This is transnationalism – being simultaneously embedded in home and host country networks and having insider knowledge about both societies. The process by which Forum came together showcases these dense transnational networks, contributes to our understanding of political transnationalism, and tells a story about how a group of migrants came together in collective action for the homeland.

I use this case study of Forum to explore transnationalism in the Poland-Polonia<sup>5</sup> economic and political spheres in the transitional period of 1989–1990. Only a few studies have looked at the effects of this political-economic transition on international migration (Morawska 2001; Erdmans 2017). U.S. scholarship on international migration has largely neglected the experiences of contemporary Polish migrants, and theories on transnationalism are overgeneralized based on research about economic migrants from Latin America and the Caribbean (Portes, Guarnizo, Landolt 1999; Levitt, Jaworsky 2007: 131). Between 1980 and 2010, only

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ing American products. The bill also rescheduled Poland's foreign debts, promoted job retraining and unemployment programs, and gave money for cultural and educational exchanges that included \$10 million to teach Poles managerial, commercial, entrepreneurial, financial, scientific and technical skills needed in a market-driven economy (Pear 1988: 8).

<sup>4</sup> Author's private collection, *Fact Sheet*, Spring 1990.

<sup>5</sup> *Polonia* is the term for the Polish community abroad, the diaspora.

12 articles (1.2%) in the journal “International Migration Studies” included any analysis of Polish migrants, only three were about Polish migrants in the U.S., and only two of these articles (0.3% of the journal’s pages) discussed contemporary Polish migrants (Erdmans 2016)<sup>6</sup>.

My research on contemporary Polish migration brings new insights to the field of transnationalism. Most research on transnationalism focuses on economic remittances from developed countries like the U.S. to developing countries in the Global South. This case study of Forum provides a different kind of transnationalism: social remittances rather than economic, looping to Eastern Europe, not the Global South. These Polish transnational migrants were well educated in professional managerial positions (though there was evidence of occupational status decline). They were also political refugees, which disposed them to political transnationalism.

### **Transnationalism in Economic and Political Spheres**

Traditional theories of migration conceptualize home and host countries as discrete spaces. In contrast, transnationalism posits an interdependent reciprocity between at least two nations (Portes, Guarnizo, Landolt 1999; Faist 2000; Kivisto 2001; Levitt, Glick Schiller 2004; Schunck 2011; Morawska 2013; Waldinger 2015). While the concept of transnationalism first appeared in the 1990s, the social form it describes is not new (Faist 2000; Kivisto 2001). Because of changes in transportation and communication technologies, however, contemporary transnationalism is more normative, complex, and plentiful than was historical transnationalism (Portes, Guarnizo, Landolt 1999).

Transnationalism is enacted through social ties that link migrants to home and host countries and manifests in material and social remittances that shape economic, political, social, and cultural spheres in both countries. Transnationalism is not synonymous with international migration, and not all migrants engage in transnational behavior. Transnationalism has been defined as “the processes by which immigrants forge and sustain multi-stranded social relations that link together their societies of origin and settlement” (Basch, Glick Schiller, Szanton-Blanc 1994: 6), and as “the cross-border spaces of back-and-forth flow of goods, ideas, and practices which join individuals, groups, and institutions and different nation states” (Morawska 2013: 7).

Key aspects of transnationalism include: 1) social networks that are simultaneously embedded in two nations; 2) flows of material and nonmaterial resources;

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<sup>6</sup> The total number of articles in the journal between 1980 and 2010 was 930; the total number of pages was 22,085.

and 3) the back-and-forth flow of resources across nation-state borders. First, transnational activities utilize networks simultaneously rooted in two countries (Basch, Glick Schiller, Szanton-Blanc 1994; Levitt 2004; Levitt, Glick Schiller 2004). Transnational migrants sustain a connection, a dense web of networks that crosses nation-state borders connecting them to non-migrants back home, migrants in the new land, and natives in the host country.

Second, the flow of material and non-material resources occurs in various domains – economic, civic-political, and socio-cultural (Levitt, Jaworsky 2007). Though scholars often separate the economic and political spheres, studies have shown that investments of émigré capital in home country economies can be motivated not only by immigrants' business interests but also a sense of obligation or emotional commitment to the homeland (Morawska 2013:15). In this way, these investments are not only for private gain, but also for the public good, which represents an intertwining of political and economic spheres, or public and personal spheres (Levitt 2001).

For this study, political transnationalism refers to activity undertaken by migrants to influence the national or local political arena in the home country. This can include sending money to political actors, voting in a home country election while living abroad, and lobbying targeted at the host country to influence home country affairs. Any behavior that is undertaken by migrants' or their descendants to help a political party or achieve a political agenda in the homeland (e.g., to oust the current government or support an emerging government) is also considered political transnationalism.

Economic transnationalism refers to the flow of resources to the home country to support national or local markets. Most research in this sphere focuses on material remittances. Other forms of economic transnationalism include the flow of new skills or innovations (e.g., migrants returning as entrepreneurs). The type and form of economic transnational behavior varies by class. Migrants with less education and fewer skills are more likely to send private remittances to family members while a transnational business class composed of highly mobile, skilled professional, managerial, and entrepreneurial elites transmit skills, cultural innovations, and economic capital (Levitt, Jaworsky 2007: 135).

The third key aspect of transnationalism is the back-and-forth flow of goods. Often in discussions of transnationalism, as in the paragraph above, the focus is on the flow of resources back to the home country. But transnational relations have a double arrow; the influence of the home country and non-migrants on migrants is the "forth" part of the process. In the case study of Forum, Polish migrants in the U.S. acted to influence the civic arena in Poland, but events in Poland also influenced migrants' organizational goals and collective actions. This is evident as Forum morphed from a political lobby into an economic support group in reaction to events unfolding in Poland from March to November 1989. The non-migrant

Poles embedded in these transnational relations were the Solidarity activists who remained in Poland, some of whom became members of the new government. They had resources: information, contacts, and sometimes even money to give to the diaspora.

In this case study, I am focusing on these three aspects of transnationalism: simultaneous embeddedness, nonmaterial resources, and back-and-forth flows. Many of the political migrants from the Solidarity movement were quintessential transnationalists. From the onset of their emigration they maintained ties with Solidarity (as an underground organization after martial law): sending funds, lobbying and engaging in protests on behalf of the outlawed movement, disseminating information, and sponsoring dissidents (Erdmans 1998). When the Polish election in June 1989 provided an opportunity to vote in the first partially free election, they organized voters at embassies in New York and Chicago. And when Poland moved toward introducing a new private market, they created Forum to support investments in the homeland.

## **Methods**

Data were collected through participant observations, interviews, and surveys. I was a participant observer in Chicago during the conception, formation, and existence of Forum (February 1989 through August 1991) and recorded my observations, conversations, and informal interviews as fieldnotes. I worked closely with the founders of Forum and helped at the Inaugural Meeting (October 1, 1989) and the First Annual Convention (November 18–19, 1989). I attended private parties, informal meetings, formal board meetings, and gatherings of Grupa Robocza (described below). I stuffed envelopes, edited speeches, and wrote press releases. I worked in the temporary office (answering phones) for a few weeks in late 1989. I attended 12 board meetings from October to December 1989, and two in 1990, and took notes at all of them. I was asked to be the temporary recording secretary for several of these meetings (and these were tape recorded and transcribed). Meetings lasted between three and six hours. Given my involvement, I had access to all internal documents, pamphlets, literature, incorporation papers, grant proposals, speeches, correspondence, and (their only) three organizational newsletters (“PAEF Bulletin”).

In addition, I designed and distributed a membership survey. This survey was completed by 78 (31%) of the 250 Forum members who attended Forum’s First Annual Convention (hereafter Convention) in November 1989. The survey was then sent to all 436 members of Forum in February 1990, and I received completed surveys from an additional 31 respondents. I also have data from a survey designed and distributed by Teresa Kusak (1989) at the Inaugural Meeting and completed

by 99 (58%) of the attendees<sup>7</sup>. Finally, I conducted interviews (tape recorded and transcribed) with three founders of Forum – Jarosław Chołodecki, Krzysztof Kasprzyk, and Christine Long.

## Founders and Members

Forum was an organization of recent Polish migrants. The majority of Forum members had arrived in the U.S. in the 1980s, as did 16 of the 27 directors (see Table 1). The key organizer and President of Forum was Jarosław Chołodecki, who had been the Regional Vice Chairman of the Opolo Solidarity Union. He was arrested December 1981 and interned for almost a year. He arrived in the U.S. as a refugee in 1984. By the late 1980s, Chołodecki had become a popular radio host in Chicago Polonia. He helped form the Brotherhood of Dispersed Solidarity Members with Hubert Romanowski, a Solidarity activist who arrived in 1982 (Erdmans 1998). Romanowski was with Forum from the beginning. A physicist by training, Romanowski was well known in the Polish community because he revived the Chicago branch of PUNO [Polski Uniwersytet na Obczyźnie or Polish University Abroad]. PUNO was popular among the new migrants because it offered classes in computers, business, and ESL. The Executive Director of Forum, Krzysztof Kasprzyk, had been in the U.S. since 1987. He was a journalist from Krakow, active in the Polish-language print media in Chicago. One final prominent director was Bożena Nowicka McLees from Warsaw, who came to the U.S. in 1975 and later became director of the Interdisciplinary Polish Studies program at Loyola University in Chicago. All four were also actively involved in KIK [Klub Inteligencji Katolickiej or Club of Catholic Intelligentsia] in Chicago. These founders were embedded in the social infrastructure of new Polonia in Chicago – organizations, media, education, and politics – and represent some of the leaders of this generation.

Several important WWII émigrés were also involved. Kazimierz Łukomski, national vice president of the Polish American Congress (PAC) participated in the discussions from the beginning and was a member of Forum's interim board of directors. Jan Nowak-Jeziorański, a national director of PAC and one of its main lobbyists, and Jan Lerski, a professor and PAC official in the Northern California State Division both publically endorsed Forum, became members, and attended the November Convention. Less than ten percent of the members, however, belonged to this migration cohort (see Table 1).

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<sup>7</sup> In addition to four demographic questions (age, gender, occupation, and immigration status), the Kusak questionnaire asked two open-ended questions: members' motivations for joining Forum, and what they hoped that Forum would accomplish.

Table 1

## Board and Member Cohort Composition of Forum

Migration and Generation	Elected Board of Directors* % (N=27)	First Annual Convention** % (N =109)
Born in U.S.	22% (6)	8% (9)
Arrived in US 1939-1959	4% (1)	7% (8)
Arrived in US 1960-1979	15% (4)	25% (27)
Arrived in US 1980-1989	59% (16)	60% (65)

\* Minutes Board Meeting December 6, 1989. According to the Spring 1990 pamphlet *Poland is Open for Business*, Forum had 26 board members, and an article in *Forum Reporter* (newsletter of the MIT Enterprise Forum, Chicago, IL, June 20, 1990) reported 24 members.

\*\* Members who completed author's survey.

Source: Author's survey.

An equally small number of Polish Americans were involved, less than ten percent of members as estimated from the survey. Yet a few Polish Americans played key roles as founders and board members, including Andrew Golko, Christine Long, and most importantly, Mitchell Kobelinski, Chairman of Forum. As a banker and attorney, Kobelinski was well integrated into the ethnic and business communities. He was co-owner of Parkway Bank, the First State Bank of Chicago and Bankway Corp and held positions as director of the U.S. Import-Export Bank (1974–1977) and president of the PAC Illinois Division (1971–1973). He was a member of the Kosciuszko Foundation, Polish American Advocates Society (president 1969), and the Chicago Society (vice president 1968–70). Since its inception in 1972, Kobelinski had been president of the Copernicus Foundation, which supported the Copernicus Center, a Polish American cultural and civic venue. Forum held its Convention and several of its board of director meetings at the Copernicus Center.

Kobelinski hoped that Forum would not be “an organization of the newest immigrants but a “Polonia” organization, which he characterized as being composed of second-, third-, and even fourth-generation members. During a discussion about attracting new participants into Forum, Kobelinski stated: “We haven’t even touched Polonia, only about three percent of Polonia. Polonia is not these newcomers [migrants], Polonia is me and Andrew and Celia and Chris and Mary [later generation Polish Americans]”. He continued: “I want to stress that [Forum] is not an organization of the newest immigrants in Polonia. Polonia is more than this. I keep saying this over and over again”<sup>8</sup>.

<sup>8</sup> Author's private collection, Minutes October 24, 1989.

Despite Kobelinski's pronouncements and desires, Forum was primarily an organization of the newest migrants. The vast majority of the directors, staff, and members were born in Poland. The survey included only nine Polish American respondents whereas 100 respondents had been born in Poland. The migrants arrived between 1937 and 1989, with two-thirds arriving after 1980<sup>9</sup>. In addition to the year of arrival, another indicator of the members' newness was their language. Shortly after the Convention, one of the directors told me there were only 12 members who were English-only speakers<sup>10</sup>.

Discussions about language required them to articulate "who" they were as an organization – Polish or American? The opinion was usually that they were both. After numerous long discussions, the interim board members decided that the language at the Convention was to be determined by the native-language of the speakers. Since most of the invited speakers were from Poland, their speeches were in Polish. This inconvenienced only a few people and individual translators were arranged<sup>11</sup>. The breakout discussion sessions were all conducted in Polish. Regarding the literature, the three newsletters were in English as was the majority of the literature leaving the office, even though the board of directors had decided that the literature should be bilingual. The board also decided the office manager must speak Polish and that minutes should be written in English<sup>12</sup>. As Kobelinski asserted, Forum "is an American organization. We should have English as the official language"<sup>13</sup>.

At the Inaugural Meeting in October 1989, Forum had 170 members and at its peak in May 1990, it had 508 members, each of whom paid an annual \$100

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<sup>9</sup> Kusak registered no Polish Americans in her survey, which was only in Polish. My survey had a Polish- and an English-language version. Kusak (1989) defined her respondents by legal status and age noting that roughly one-third were in their 30s and represented what she referred to as the "Solidarity emigration;" another third were over 50 and were "patriotically motivated;" and the final third were in their 20s and were less permanent "economic immigrants".

<sup>10</sup> Fieldnotes December 13, 1989.

<sup>11</sup> At the Convention, on the first night, the American politicians spoke in English, and in my fieldnotes I estimated roughly 25 percent of the audience was inconvenienced. On the second day, the Polish officials spoke in Polish and only a handful of people requested translators. At the Inaugural Meeting, the opening session was in English (the Polish Senator had a translator), but the sessions on investment clubs, mutual funds and joint investment ventures were conducted in Polish. In my fieldnotes I estimated that less than ten people were handicapped by this Polish-only format.

<sup>12</sup> The transcribed minutes from October 24, 1989 included a discussion about the language of the upcoming Convention. At that meeting Kobelinski said: "There should be no more literature leaving this office in English only". At the board meeting on December 6, 1989, they voted that English was the official language, but that the bylaws should be written in Polish and English. At the board meeting on January 15, 1990, there was again a discussion whether the official language should be Polish or English. Several directors noted that almost all of the members spoke Polish and that the Convention language was Polish. It was decided that the literature leaving the office should be in Polish as well as English, but that the minutes would be written in English, and that English was the official language.

<sup>13</sup> Author's private collection, Minutes December 6, 1989.

Table 2

## Occupation of Polish-born Forum Members (N=80)\*

	Occupation in Poland	Occupation in the U.S.
Engineer	19	10
Professional	27	15
Management	4	7
Technocrat	21	10
Own Business	1	8
Laborer (skilled/unskilled)	6	28
Other	2	2

\* For those arriving to the U.S. after 1959.

Source: Author's survey.

membership fee. The majority lived near Chicago: 88 percent lived in Illinois, and the others were scattered over 20 states and two provinces in Canada<sup>14</sup>. It was also a mostly male organization as evidenced by the Inaugural Meeting (71% men) and Convention attendees (87% men)<sup>15</sup>. There was a wide age range (22 to 72), but most respondents (72%) were between 30 and 49 years of age.

The migrants came mostly from urban areas of Poland – 67 percent from provincial capitals and only 13 percent from small towns with less than 10,000 people. More than half came from three cities: Warsaw (26%), Krakow (17%), and Katowice (10%). They were mostly permanent residents. Although 45 percent of the respondents had arrived to the U.S. with temporary visas (and this increased to 58% for those arriving in the 1980s), at the time of the survey, 44 percent were U.S. citizens and another 42 percent were permanent legal residents. Only 32 percent said they intended to remain in the U.S., another 47 percent were uncertain whether they would stay or return to Poland, and the remaining 21 percent said they planned to return to Poland. Neither migrants' age nor resident status showed any strong relation to their intention to return.

Forum members were generally well educated with professional and managerial occupations. All of the Polish Americans had post-secondary education and professional occupations. Two-thirds of the migrants had post-secondary education;

<sup>14</sup> Author's private collection, Minutes May 17, 1990. They reported the data at the meeting. It was similar to respondents of my survey: 86% lived in the greater Chicago metropolitan area, 57% within the Chicago city limits, and 30% in Chicago neighborhoods. There was little difference in the percentage living in the Chicago SMSA and outside of Chicago when broken down between respondents who attended the Convention (n=78) and the mail respondents (n=31): 14% vs 16% lived outside the Chicago SMSA.

<sup>15</sup> Kusak's survey; author's survey.

roughly one-third worked in manual labor occupations in the U.S. and 44 percent worked in professional managerial occupations. The others were technicians and business owners (see Table 2). When compared to their occupations in Poland, there is evidence of occupational status decline: fewer than half of them were also engineers and other professionals in the U.S., and the number of laborers increased four-fold<sup>16</sup>.

### Forum as a Political Organization

Forum leaders argued that economic support for the private market in Poland was a patriotic act. Investment dollars were a form of political demonstration. In a round table discussion with founding members of Forum, Chołodecki said that Forum “is nothing more than an idea to make another demonstration – only without the rotten eggs” and Kasprzyk said “Poland is crying out for help” (*Jeden cel – pomoc Polsce* 1989: 6). Economic investment was not framed as an instrumental act to enrich individual investors, but instead as an action that would contribute toward the collective good of a more liberal Polish market and government. Chołodecki said: “Our goal is to build a middle class in Poland. The middle class is vital to keep the Polish revolution alive” (Karwath 1989: 23). In his address at the Inaugural Meeting, Chołodecki talked about “founding members” of Forum who want to “express their patriotism by building an institution devoted to encouraging foreign investment in Poland”.

Letters sent to Senators in Poland inviting them to attend the Forum Convention stated: “We believe that organizations which facilitate foreign investment in Poland, such as the Forum, play a critical role in the survival of the new economic order, without which the new Solidarity-backed government could fail”<sup>17</sup>. One year later, in the September 1990 “PAEF Bulletin”, an appeal for membership renewal framed the economic transition taking place in Poland as “round 2 of the fight, the first round was 1980–81,” and urged members to “help to continue this all important round of fight for Poland”.

Responses from the surveys of Forum members suggest that many of them did indeed define their investments as acts of patriotism. In Kusak’s survey, 70 percent of the respondents said they became involved in Forum for political reasons. One member said: “It’s our responsibility to bring help to our nation” and others described their membership in Forum as a “duty” and “obligation” in order “to help” Poland “our fatherland” (1989: 4–5). In my survey, I asked respondents why they joined Forum. The survey provided five choices and asked them to check all that applied, and then rank their choices. The largest percent (73%) wanted to

<sup>16</sup> In Kusak’s survey, 18 percent were working in temporary jobs below their qualifications.

<sup>17</sup> The copy of the letter I have was addressed to Andrzej Piesiak.

Table 3

## Reasons for Joining Forum (N=97)\*

	Percent
To help Poland	73%
To get information about investments	67%
To support a new initiative	48%
To support the leaders of Forum	45%
To meet new people	25%

\* Respondents were asked to choose all that applied.

Source: Author's survey.

help Poland (see Table 3). In addition, almost half of the respondents (47%) chose "Help for Poland" as their first choice.

The political orientation of Forum is also evidenced in the narratives about how Forum was founded. Forum had two origin stories and both suggest political roots. The first narrative puts the genesis of Forum in early 1989 with an idea that originated with a small group of Solidarity refugees and WWII émigrés discussing the need for a strong Polish lobby in the U.S. At that time, they imagined something they called the "Million Dollar Lobby," which they proposed would collect one percent of members' incomes<sup>18</sup>. A few months later, shortly after the June 4 elections, the nascent lobby was renamed the Polish American Political Action Committee (PAPAC). The intention was to organize this through the North American Center for the Study of Polish Affairs in Ann Arbor (Studium). A memorandum from Peter Swiecicki, chairman of the Executive Committee of Studium, explored the establishment of a 501c(4) organization named Studium Spraw Polskich [Study of Polish Affairs] as a political wing of the center<sup>19</sup>. The same people talking about the

<sup>18</sup> The first discussion I recorded about the new lobby initiative appeared in my fieldnotes on February 1, 1989 with continuous references in March and April. The information came from conversations with Chołodecki, Łukomski, and Romanowski.

<sup>19</sup> The memorandum (dated July 21, 1989) and a copy of the Articles of Association of Studium Spraw Polskich are in the author's personal archives. A discussion about PAPAC and Studium Spraw Polskich took place at a picnic at Chołodecki's house on June 11, 1989, and included Łukomski, Witold Sulimirski, and Swiecicki (Author's private collection, Fieldnotes June 11, 1989). As with the Million Dollar Lobby, the contributors to this lobby were to come from among the academic, professional, industrial, and political Polish American leaders and funding was to come from an assessment of one percent of members' income. Chołodecki said that they needed to work together with Studium because of the resources Studium could provide: "They have a good name. They also have some small finances they could give us. And they have contacts. They gave us their mailing list, and they have a very respectable, intelligent and concerned group of members from all around America. The last reason we are using them probably is because they are very cooperative" (Author's private collection, Interview September 6, 1989). Other fieldnotes on this topic were July 1, 1989 and October 1, 1989.

Million Dollar Lobby were organizing PAPAC, and the discussion now included members of Studium as well as several new Solidarity refugees living in California, Connecticut, and New York.

In August 1989, Forum replaced PAPAC as the buzzword. The underlying motivation for all three endeavors – the Million Dollar Lobby, PAPAC, and Forum – was the same: to build a stronger Polonia lobby. Chołodecki said that Forum’s \$100 membership fee was important because “it’s not only [an] investment in Forum, but it’s connected with the lobby I have been talking about for a long time, and the money will go for the lobby”<sup>20</sup>.

The interconnectedness between these early endeavors led Romanowski to ask Chołodecki, “What is it now, Forum? Before it was PAPAC; what happened to PAPAC?”<sup>21</sup> What happened was that the situation in Poland changed, so the scheme around which Poles were mobilizing the community changed. Events in Poland affected organizational behavior in Polonia. Prior to the election in June, their activity was supporting candidates in Poland, getting out the vote in Chicago, and building a strong U.S. Polonia lobby (Erdmans 1998). After the election and the formation of the new government in August, Poland was moving toward a free market, and the investment rhetoric, or framing of Forum was a new way to secure a financial foundation for their political organization. The plan was that an organization with economic goals could provide a resource base for lobbying activities.

Forum replaced PAPAC as a mobilizing scheme at the same time that Western aid packages for Poland were being discussed. Chołodecki was in Poland in July 1989 when U.S. President George Bush revealed the SEED aid package. Chołodecki returned to Chicago charged with informal directives from Polish leaders that Polonia needed to respond to Poland’s economic needs. A few days after his return he told me about a group of Poles in Chicago organizing a “Polish Forum, along the same lines as PUSH, an investment group of about 2000 people to invest in Poland and get together to discuss methods of helping Poland”<sup>22</sup>.

The narrative that Forum had its roots in the Million Dollar Lobby and PAPAC is the first origin story. In this version, an elite group organized Forum from the top down. The second story describes Forum as a grassroots movement that emerged from the sentiment of a cadre of politically conscious new migrants. The story is this: in late July, a listener to Chołodecki’s radio program on WPNA called in (this was soon after Chołodecki returned from Poland), and on the air “he suggested that people interested in helping Poland should get together and start a new venture”. In both public and private conversations, this was the genesis

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<sup>20</sup> Author’s private collection, Fieldnotes August 3, 1989.

<sup>21</sup> Author’s private collection, Fieldnotes September 14, 1989.

<sup>22</sup> Author’s private collection, Fieldnotes July 20, 1989. PUSH stands for People United to Serve Humanity, an organization created by Jesse Jackson in 1971 in Chicago that supported the economic development of African Americans.

of Forum – a suggestion from a radio listener that turned into a ground swell of support from the listening audience<sup>23</sup>.

Chołodecki's radio program, *Studio D*, was a three-hour local daily program in Polish that was taped and aired in Chicago on the WPNA station that had an estimated listening audience of about 30,000. The format of the program was news-oriented, with guest speakers, discussion, and listener call-in periods. Chołodecki used his ties to Solidarity to get information for his show and guest speakers (e.g., activists from the opposition, candidates in the election, and eventually members of the government). His ties to Poland gave depth to his radio show and strengthened his listener base.

Support for Forum came from this listener base. Listeners formed what was later called Grupa Robocza [Working Group], composed of roughly 40 recent migrants, mostly men, who met once or twice a week in the organizing phase in October and November 1989. The language at their meetings was Polish. Chołodecki led this group as a charismatic leader. In the early stages, there was a lot of discussion about what they should do, and as events unfolded, the meetings included stuffing 4000 envelopes, passing out flyers, and painting banners. In contrast to the formal board meetings (conducted in English when Kobelinski was present), at the meetings (or gatherings) of the Grupa Robocza people milled around, smoked cigarettes, and talked politics. Describing these gatherings one member said: "It looks like Solidarity time, everyone putting stamps on envelopes, doing something, just lots of activity"<sup>24</sup>. On the eve of the Convention, as the workers opened champagne bottles and the noise level rose, another said, "Spirits are high; this is just like Solidarity time". They were emotionally charged to be involved in an organization designed to help others invest in Poland because they believed that stabilizing the economy would contribute to supporting the newly elected Solidarity government.

This grassroots narrative carried the organization through the Convention, lasting longer than the dream of creating a strong political lobby. In the beginning, the grassroots organization and the lobby were intertwined. In early August, soon after the listeners started calling the radio station offering to give \$100 for this emerging organization [Forum], Chołodecki said "the money will go for the lobby. We need to be able to influence investors to put money in Poland"<sup>25</sup>. An early appeal letter sent in September 1989 to prospective Forum members stated explicitly: "We will create a Polish lobby in America". By October 1989, however, especially after Mitch Kobelinski became more involved (he joined the organizing

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<sup>23</sup> This story was told to me by Forum members several times and recorded publically at the Inaugural Meeting (Author's private collection, Fieldnotes August 3, 1989; October 1, 1989; November 11, 1989 as well as Minutes of board meetings October 24, 1989; November 1, 1989). This is also how Forum's origins were described in an article about Forum in "Kurier" (Jeden cel – pomoc Polsce 1989).

<sup>24</sup> Author's private collection, Fieldnotes November 9, 1989.

<sup>25</sup> Author's private collection, Fieldnotes August 3, 1989.

group in early September), the idea that Forum would be involved in lobbying activities was squashed. Lobbying placed Forum in direct competition with the PAC (see Erdmans 1998). Kobelinski and others found this conflict counterproductive. Before the Convention, Forum leaders began to claim publicly that it had no ambitions of becoming a lobby. Kobelinski said: "If someone has conflict then they are misinterpreting the efforts of Forum, we are not reorganizing Polonia, this is not taking a political role, this is an economic organization"<sup>26</sup>.

While Forum gave up explicit lobbying goals<sup>27</sup>, the Polish-born founders and many of the members maintained the grassroots political belief that economic investment was a form of political support for the newly elected Solidarity government. Most of the members, it appears, also did not want Forum to become a lobbying organization but they also joined Forum "to help Poland". One of the questions in the member survey read: "Forum is an economic organization. Should Forum also have political activities in addition to economic activities?"<sup>28</sup> The possible answers were "Yes," "No" and "Don't know". Among the 96 members born in Poland who answered this question, only 32 percent chose "Yes," and 53 percent chose "No". However, 73 percent of the same respondents said they joined Forum "to help Poland".

### Economic Nature of Forum

As far as the Polish American banker Mitchell Kobelinski was concerned, Forum was strictly an economic venture. He repeated several times: "We are in the business of promoting foreign investment in Poland"<sup>29</sup>. At one point, when there was discussion about a proposal for promoting the purchase of Polish government bonds, Kobelinski asked: "How does this relate to the private sector in Poland? This is an organization for investment in the private sector". Chołodecki argued that the bonds would help the Mazowiecki government become more stable. Kobelinski responded loudly: "I don't want to save Poland, I want to invest in Poland. A government bond is not a private investment"<sup>30</sup>.

Members said they were ready to invest, and Forum tried to give them information and skills to help them invest. In the member survey, 21 percent said that

<sup>26</sup> Author's private collection, Minutes October 24, 1989.

<sup>27</sup> Explicit goals, according to a Forum office administrator, meant: "...to pressure the U.S. government to extend credits and loans and to encourage businesses to invest in Poland..." and urge the U.S. government to pressure the Polish government to loosen restrictions on foreign investments (Author's private collection, Fieldnotes November 11, 1989).

<sup>28</sup> In Polish: "Forum jest organizacją gospodarczą. Czy organizacja ta powinna prowadzić działalność polityczną obok gospodarczej?"

<sup>29</sup> Author's private collection, "PAEF Bulletin", September 1990; Fieldnotes November 20, 1989; Minutes January 15, 1990.

<sup>30</sup> Author's private collection, Fieldnotes November 20, 1989; November 28, 1989.

they were willing to invest over \$50,000, another 34 percent were willing to spend between \$10,000 and \$50,000, and only two percent were prepared to invest nothing. In addition, 67 percent of respondents said they became involved because they wanted information about Poland's market<sup>31</sup>. Forum developed a set of committees to disseminate information in four areas that members expressed interest: medical equipment, agriculture, information, and electronics<sup>32</sup>. To promote investments, Forum leaders attended a seminar for Polonia investors in Opole (November 1989), and organized trade missions to Poland (April and November 1990). Forum also organized and co-sponsored business seminars in Chicago<sup>33</sup>. Walter Jermakowicz, a Forum board member, published the third edition of his book *Foreign Investment in Poland, A Practical Guide*, under the support of Forum and marketed it in the "PAEF Bulletin".

The delegates from Poland who attended the Convention in November 1989 came with very specific economic proposals. In addition to a guest appearance by Lech Walesa, the delegation included: Janusz Onyszkiewicz, National Solidarity spokesman; Lech Jeziorny, Vice President of Krakow Industrial Society; Jan Bielecki, Member of Parliament; Andrzej Arendarski, Member of Parliament; Michael Wojtczak, Member of Parliament and Deputy Minister of Agriculture; Senator Andrzej Machalski, a representative of Akcja Gospodarcza [Economic Action]<sup>34</sup>; and Dariusz Ledworowski, Deputy Minister of Foreign Trade. These delegates brought specific investment packages (e.g., a horse breeder needed a foreign partner, a private bank wanted backers for a joint stock company). Senator Machalski was looking for capital to modernize the Polish communications system. Janusz Onyszkiewicz gave Forum a package of investment proposals from farmers and businessmen in the town of Przemyśl (e.g., one man had a castle to sell, another had land he wanted to develop)<sup>35</sup>.

Beginning in October 1989, Forum started collecting data about investment opportunities in Poland<sup>36</sup>. By May 1990, the Forum office in Warsaw had 1000 invest-

<sup>31</sup> In Kusak's survey, 45 members said they joined Forum for political reasons, 27 for personal economic gains, and 25 said both.

<sup>32</sup> Author's private collection, Minutes October 24, 1989. There was much discussion of these committees before and after this board meeting. The Convention breakout sessions were also organized around these topics.

<sup>33</sup> Author's private collection, Minutes November 9, 1990; Fieldnotes October 13, 1990. Seminars were the International Business Seminar (October 13, 1990) and the MIT Enterprise Forum of Chicago (June 20, 1990) both co-sponsored with National-Louis University, Chicago.

<sup>34</sup> Akcja Gospodarcza was organized in 1988 to help restore the free market in Poland, with a strong emphasis on economic freedom, entrepreneurship, and private property. Machalski was one of 20 founders.

<sup>35</sup> Convention documents handed out to participants and later given to the executive committee.

<sup>36</sup> Forum developed a data bank for investment plans (Author's private collection, Minutes October 31, 1989). They created a list of potential investment opportunities in Southern Poland (Minutes November 1, 1989; November 9, 1990). Some ideas for investments came from the U.S.; for example, a man in Chicago wanted to start a waste management plant in Poland (Author's private collection, Fieldnotes November 13, 1989).

ment proposals in their data bank<sup>37</sup>. Opportunities for investments were listed in each "PAEF Bulletin". For example: "STOCZNIA WISLA: Shipyard producing small and medium range ships, fishing boats. Interested in joint venture. Location: Gdansk" or "UNIMASZ: Producer of electronic devices. Interested in all types of cooperation. Location: Olsztyn". Other companies interested in joint ventures were producing cotton fiber, medical supplies, leather goods and industrial gas meters. They had offers for investors in resorts, factories for lease and land for sale, building renovation projects, and rehabilitation centers. Poland, as the Forum brochure emphasized, was certainly "Open for Business".

### Comingling of Political and Economic Spheres

Help for Poland: a patriotic activity was manifest as economic investment. While lobbying activity never materialized, the idea that investment dollars were support for the newly elected government captured the economic and political comingling. Under communism, the state was the owner of production so the transition from communism took place in both the political and economic spheres. Lech Walesa on his trip to the U.S. in November 1989 promoted the idea that investment dollars were political dollars. In his speech to the joint meeting of Congress he defined Poland's economic problems as rooted in the previous political system, and asked the U.S. for a Marshall Plan strategy, an infusion of money which he defined as "an investment in freedom, democracy and peace" (Lewis 1989: 10).

Walesa's trip included a stop in Chicago and the Polish-born Forum leaders were adamant that Polonia make a strong showing at his rally downtown. Forum spent \$1700 on 4000 flyers and 200 posters for the rally and placed an advertisement in the "Dziennik Związkowy" that headlined Walesa and sidelined Forum. The Polish American leaders were upset that Forum was not more prominently displayed in the advertisement, but Chołodecki claimed: "We have to make a big Polonia show for Walesa. It's *our duty* to prepare [the rally] to the best of our ability"<sup>38</sup>. One member of the Grupa Robocza said about Walesa's visit, "This is even bigger than Forum"<sup>39</sup>.

Even more important than the rally, was securing Walesa's presence at the Convention. There was some conflict and competition between the PAC and Forum regarding Walesa's visit – a byproduct of Forum's initial lobbying endeavors. Walesa eventually agreed to a short appearance on the opening night of the Convention. He encouraged the attendees to invest in Poland and to return to Poland stating: "You have two homes and you are welcome back to Poland at any time". He assured

<sup>37</sup> Author's private collection, "PAEF Bulletin", August 1990.

<sup>38</sup> Author's private collection, Minutes November 11, 1989.

<sup>39</sup> Author's private collection, Fieldnotes November 9, 1989.

them that: “There are big opportunities for businesses in Poland. You will be the Columbuses. You will lead the way”<sup>40</sup>.

Leaders in Poland and Forum recognized that the new battlefield was in the market sphere and that the opposition was pivoting. As one reporter wrote: “Solidarity activists are redefining reform by directing their efforts from political to economic activity and preaching a new philosophy: Form a club or lobby to do what needs doing, and finance it yourself in the marketplace” (Wedel 1989: 19). Forum represented this new philosophy. With roots in the political sector and activity in the economic sector, Forum gave its members the opportunity to support the liberalization of the market and back the new government at the same time.

### **The Polish American Economic Forum as a Case Study in Transnationalism**

This case study of transnationalism takes place within the overlapping economic and political spheres. It shows the interdependent social networks, dual locations, and the back-and-forth movement of resources between home and host countries. Forum is also an example of public transnationalism, and, although the numbers were small, an example of political transnationalism among later generation ethnics.

At the core of transnationalism is interdependency fully embodied by the dual arrows of the back-and-forth flow of resources from simultaneously embedded networks in home and host societies. In Forum we see this cross-national flow manifesting in networks and knowledge. Regarding networks, the leaders of Forum, both the migrants and the Polish Americans had ties in both countries that supported the emergence of this organization. In a letter sent to Senators in Poland inviting them to attend the Forum Convention they wrote: “the Polish American Economic Forum serves to strengthen the natural ties between Poles in America and their homeland”<sup>41</sup>. In the informational literature mentioned above, Forum stated that the group was formed from Polish migrants in America who had been active in the Solidarity movement and who, in emigration, had maintained their relationships with “friends in Poland, many who are now found at the highest levels of the legislative and administrative branches of government”. Chołodecki at one point stated: “I am feeling like I am part of the operation over there [in Poland], I am still a member of the movement and we can bargain with the government now”<sup>42</sup>. Yet Chołodecki also had networks among the Polish-speaking community

<sup>40</sup> Author’s private collection, Fieldnotes, Convention November 18, 1989. The latter quote was used in the Forum pamphlet *Open for Business*.

<sup>41</sup> Defined as “natural” draws attention to the character of a tie as being deep-rooted and hard to dissolve.

<sup>42</sup> Author’s private collection, Interview, August 1, 1989.

in Chicago, especially as a radio personality. He was a transnational broker in simultaneous dual locations. He had a foot in both worlds (Levitt 2004).

Another example of dense transnational social networks grounded in the community and expressed at the individual level can be found in the following story. A 24-year old migrant, taking a leave of absence from graduate school in Warsaw and visiting the U.S., heard about Forum from his mother, who lived in Warsaw and heard about Forum on Radio Free Europe. She called him in the U.S. and told him to investigate the organization. He saw an advertisement for Forum in the Chicago-based “Dziennik Związkowy”. His family managed a business in Warsaw and they were looking for investors<sup>43</sup>. He contacted Forum and then became active in the organization at the office-administrative level. His story shows how dense social networks encapsulate transnational migrants. Information flowed between family members (via phone lines) located in different countries; information flowed from an international radio station and a local Polish-language newspaper. The information went from Chicago to Warsaw and back to Chicago.

Knowledge also flowed in both directions as investors and organizers had to understand two systems. To develop market enterprises, knowledge acquired in the U.S. was useful. For example, when they were setting up their office in Warsaw and developing a data bank, the executive officers of Forum believed that the marketing and computer standards in Poland were not as developed as they were in the U.S. and therefore they contracted the services of a Polish migrant in the U.S. to develop the software<sup>44</sup>. The title of one article about Forum “Poles in Chicago Help Export a Way of Life”, reflects this belief that Polish migrants in America were uniquely located to help Poland because they had knowledge and skills from both cultures (Karwath 1989). Walter Jermakowicz, for example, a Solidarity refugee and professor of business at an American university, published a guide on how to do business in Poland. He argued that he and other business professors in the U.S. were uniquely situated to offer assistance on how to set up the new capitalist economy. In this case, information was flowing from the U.S. to Poland, delivered by a Polish professor who had studied and lived in both systems.

Investors needed help maneuvering through the political and economic landscape in Poland. An article entitled *Help for Investors Who Don't Know Kafka* makes an argument for why Forum was useful to investors trying to navigate the new economic environment. The article noted that the members of Forum were émigrés who “...have maintained close ties with Poland. So they know the practical obstacles involved in starting up a business in the country's sluggish, post-socialist economy” (*Help for Investors Who Don't Know Kafka* 1990: 6). This knowledge of

<sup>43</sup> Told to me at a Grupa Robocza gathering (Author's private collection, Fieldnotes: November 10, 1989).

<sup>44</sup> Author's private collection, Minutes November 1, 1989.

the terrain in Poland included the ability to find a central location for their office in Warsaw and get two phones hooked up in only a few weeks, which they referred to as a “miracle” in that era<sup>45</sup>. The recent migrants understood the previous communist administration, as Executive Director Krzysztof Kasprzyk stated: “We are very familiar with this type of system, we lived for a long time in totalitarian rule so we know how they are running things”<sup>46</sup>.

The interdependence of the two societies is seen in the migrants’ dual embeddedness in both the host and the home countries. A clear example of this is Chołodecki, who brokered relations between Poland and Polonia. His radio program in Chicago linked him to the Polish-language audience that provided members and resources for the new organization. Chołodecki’s networks also extended back to the opposition in the homeland. These ties from Poland also extended into spaces in America as he used his ties to other refugees to create organizations (like Forum, but also Brotherhood of Solidarity). Several Solidarity refugees became directors of Forum and played key organizational roles in their respective Polonia communities across America. Chołodecki also maintained his ties to Poland. He was pivotal in arranging the appearance of Walesa, Onyszkiewicz, and other state officials at the Convention as well as the politicians and officials who attended the Inaugural Meeting: Senator Celinski, Maciej Kozłowski (a Catholic journalist), and Jan Gornik (a famous dissident). In addition, Chołodecki invited Andrzej Drawicz, the director of Poland’s state-owned (public) radio and television broadcasts to the opening of the Forum office in Chicago.

Forum was an example of public action for the homeland. Forum showed support for the newly elected government by promoting and facilitating foreign investments in Poland’s economic sector. Ewa Morawska (2004), looking at transnational behavior among contemporary Poles in the Philadelphia in 2001–2002, found examples of private transactions (individual investment), but no evidence of public transactions (public goods). She argues that public actions for the homeland require strong migrant leaders and organizations, and theorizes that the reason for the absence of public transactions was that Poles did not trust the public sphere because of their experiences with Communism, and therefore deliberately avoided institutional membership. I found, however, in this case study of Forum, an example of public transaction as evident in both the intertwining political/economic nature of the migrant leaders’ initiatives and the members’ motives for joining. This could support Morawska’s argument that collective action requires strong migrant leaders and organizations. Chicago, compared to Philadelphia, had a dense and organized ethnic Polish community, a large population, numerous economically successful Poles and Polish Americans, an active population of Solidarity refugees,

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<sup>45</sup> Author’s private collection, Fieldnotes January 15, 1990.

<sup>46</sup> Author’s private collection, Fieldnotes October, 9, 1989.

strong migrant leaders, and professional Polish-language media. This created fertile ground for public transnationalism.

Finally, the case study of Forum also shows that while migrants were more likely to engage in transnational behavior, second and later generations were also interested. Most studies on transnationalism look at the behaviors and identities of migrants with assumptions that relations with the homeland diminish over the generations. In this case study, the migrants were certainly the dominant group, however, there were some Polish Americans (second, third, and fourth generation) who were active organizers and members. For some, this interest in Forum represented commitment to their ancestral homeland (a public good). One second-generation Polish American said he joined Forum because of an “altruistic need to go to Poland to help out”<sup>47</sup>. Celia Berdes, a third generation and part of a group of Polish Americans involved in the organizing stages, joined Forum to help Poland and not to invest. She explained: “I saw Walesa on Barbara Walters’ show [and] got excited. ... He said if Poland fails it will be the fault of every American. ... I wanted to do something, I talked to my friends ... there are a lot of people like me, people who are interested and want to do something”<sup>48</sup>. They were interested in a public good.

Were there also private gains? Yes. Kobelinski and Chołodecki increased their stature in the community and made their social networks richer. Social capital is an asset in their fields – investment, media, and government. Chołodecki later took a position as a radio host in Poland. Kobelinski landed a lucrative U.S. government contract. In addition, Romanowski became Consul General in Chicago in November 1990, and Kasprzyk went on to become the Consul General in Los Angeles, Vancouver, and then New York.

### **Conclusion: What Happened to Forum?**

Within two years from its founding, Forum was closed for business. Not long after the Convention, Mitch Kobelinski created a new firm so similar to Forum that he said his role in the new company may “collide with the functions of being Chairman of Forum”<sup>49</sup>. By late spring he stepped down as Chairman after the Overseas Private Investment Corporation negotiated a contract with his bank to handle loans below \$500,000 for investment in Poland. Several months later, in August 1990, Kasprzyk resigned as Executive Director.

After one year, dues notices were sent to members. Less than 50 people (10%) renewed their membership. One reason for the decline was that Forum failed to deliver social or economic benefits to its members. Grupa Robocza held meetings in the first few months after the Convention and then the group disbanded.

<sup>47</sup> Author’s private collection, Fieldnotes November 16, 1989.

<sup>48</sup> Author’s private collection, Minutes October 24, 1989.

<sup>49</sup> Author’s private collection, Minutes December 28, 1989, January 5, 1990.

Without a Convention, a Walesa rally, or some other large social gathering to plan, there was little for them to do. As for economic benefits, although Forum's Chicago office had data on investment schemes, taxation, and legal systems, the office did little to pass this information to its members. In the first year of operation, only three newsletters were published. The Warsaw office, although it boasted about a data bank of 1000 proposals, was underfunded and disorganized; in spring of 1990 they did not even have a printer or a typewriter<sup>50</sup>.

Forum also never secured any institutional funding<sup>51</sup>. It was a new organization and lacked the legitimacy and expertise needed to compete for funds. Although Forum was one of the first organizations of its kind in the U.S., numerous organizations became oriented toward helping Poland develop its free market system and thereby competed with Forum for public and private resources.

Finally, Forum lost its political *raison d'être*. As Poland moved forward quickly to privatize its economy, and other Eastern bloc countries moved toward liberal states and markets, the need to support the new Polish government through economic investment became less necessary. With the liberalization of the region and the disbanding and disarming of the Soviet bloc, there was no longer any fear that the communist regime would topple the new government.

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<sup>50</sup> Fieldnotes May 17, 1990; Report October 30, 1990. Other problems identified: workers had not been paid; there was little communication with the Chicago office; and there was no contract with the organization sub-leasing office space.

<sup>51</sup> Minutes May 7, 1990. Eleven proposals were submitted by February 1990: two to federal agencies (AID, USIA), and nine others to private foundations. Fieldnotes February 5, 1990.

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