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The Kalmar Union and the Polish-Lithuanian unions (part 1) – origins and causes of establishment*

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As Zenon Hubert Nowak, a historian from Toruń, remarked almost a quarter of a century ago: “the establishment of two great state organisms – the Polish-Lithuanian Union and the Kalmar Union – at the end of the 14th century, which was undoubtedly one of the most significant events in the history of northern and central-eastern Europe in the late Middle Ages, has not yet been the subject of a comprehensive comparative study or of a presentation of the times of mutual cooperation”.¹ Despite some attempts to fill the

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¹ Z.H. Nowak, *Współpraca polityczna państw unii polsko-litewskiej i unii kalmarskiej w latach 1411–1425*, Toruń 1996, p. 5. Juliusz Bardach stated half a century ago: “It still remains to establish the place which the Polish-

research gap in this area, which will be discussed later, most of Nowak's proposals remain valid, and although the Kalmar Union differed in many respects from the Polish-Lithuanian Union ratified a dozen or so years earlier in Kreva, this does not mean that the two states did not share certain similarities, which further supports the importance of comparative studies.²

It must be stressed that union issues are still of interest to many researchers from various countries. However, while the literature on each of these two state unions separately is extremely rich, and domestic historiographies have made the issues of the union one of the central concerns of medieval and early modern studies, the argument for comparative work continues to be relevant.³ The more so because, as far as the Scandinavian countries are concerned, the history of the Polish-Lithuanian Union was, and still is, marginal to the studies of historians from the Nordic countries. The same is true of the studies on the history of the Kalmar Union in Poland, the history of which attracted, and still attracts, little interest from Polish researchers, which does not mean, however, that historians themselves, as well as historians of law and political systems, have not produced any scholarly output on the subject.

The tradition of comparative studies on the fate and character of the Kalmar and Jagiellonian unions dates back to the early 20th century, when Antoni Prochaska, in his article *Unia Kalmarska i Jagiellońska [The Kalmar and Jagiellonian Unions]* was the first

-Lithuanian Union occupied among the unions in Europe at that time. To this end, it would be necessary to determine the nature of feudal unions, their relation to the idea of a sovereign nation state which was already forming at the time, and the place of the Polish-Lithuanian Union in this context... This last issue, which requires comparative study, deserves a separate, detailed treatment"; idem, *Krewa i Lublin. Z problemów unii polsko-litewskiej*, in: idem, *Studia z ustroju i prawa Wielkiego Księstwa Litewskiego: XIV–XVII w.*, Warszawa 1970, pp. 17–18.

² See R. Frost, *Oksfordzka historia Unii Polsko-Litewskiej*, Vol. 1: *Powstanie i rozwój 1385–1569*, trans. T. Fiedorek, Poznań 2018, pp. 104–105.

³ Cf. A. Zakrzewski, *Between the Union of Lublin and the Mutual Pledge of the Two Nations. From the Union of Two States to the Commonwealth of Three Provinces*, "Zapiski Historyczne" 2019, Vol. 84, No. 4, pp. 5–40.

Polish historian to make a pioneering attempt at a comparative analysis of the two state unions: to present their origins, similarities, and differences, and the reasons for their collapse.⁴ More than 30 years later Oskar Halecki continued Prochaska's studies and in 1938 published an article entitled *Unia Polski z Litwą a unia kalmarska* [*The Union between Poland and Lithuania and the Kalmar Union*].⁵

This date undoubtedly constitutes a caesura for our research into the history of both unions and marks the beginning of a long period in which the outlined issues in relation to the Polish-Lithuanian unions (especially those of Kreva and Lublin) were still the subject of many monographic studies, while the question of the union of Scandinavian states was dealt with in Polish historiography mainly in general studies, above all in syntheses of the history of individual Scandinavian countries.⁶ It was not until the aforementioned Zenon Hubert Nowak, who can be regarded as one

⁴ A. Prochaska, *Unie Kalmarska i Jagiellońska*, "Przegląd Polski" 1904, Vol. 154, No. 461, pp. 193–213; idem, *Król Władysław Jagiełło*, Vol. 1, Kraków 1908, pp. 152–154.

⁵ O. Halecki, *Unia Polski z Litwą a unia kalmarska*, in: *Studia historyczne ku czci Stanisława Kutrzeby*, Vol. 1, Kraków 1938, pp. 218–232.

⁶ See *inter alia* T. Manteuffel, *Historia powszechna. Średniowiecze*, Warszawa 2012, pp. 339–340; B. Zientara, *Historia powszechna średniowiecza*, Warszawa 1994, pp. 456–458; *Historia Europy*, ed. A. Mączak, Warszawa–Wrocław–Kraków 1997, pp. 207–210; W. Czapliński, K. Górski, *Historia Danii*, Wrocław 1965, pp. 122–125, 166–169; W. Czapliński, *Dzieje Danii nowożytnej*, Warszawa 1982, pp. 14–15, 24–25; I. Andersson, *Dzieje Szwecji*, trans., introduction and edition S. Piekarczyk, Warszawa 1967, pp. 71–85; A. Kersten, *Historia Szwecji*, Wrocław 1973, pp. 88–92, 101–130; A. Berezajarczyński, *Zarys dziejów Norwegii*, Warszawa 1991, pp. 57–68; J. Małek, *Historia Norwegii (do roku 1814)*, Toruń 2019, pp. 220–277; W. Froese, *Historia państw i narodów Morza Bałtyckiego*, trans. M. Dorna, E. Płomińska-Krawiec, K. Śliwińska, Warszawa 2007, pp. 120–127, 132–134. Among the few monographs, the following should be mentioned: B. Piotrowski, *Tradycje jedności Skandynawii. Od mitu wikińskiego do idei nordyckiej*, Poznań 2006; idem, *Integracja Skandynawii. Od Rady Nordyckiej do wspólnoty europejskiej*, Poznań 2006; idem, *Cele, założenia i dylematy unii kalmarskiej (1397) w historiografii*, "Nautologia" 33, 1998, No. 1(127), pp. 1–11; P. Żurawski vel Grajewski, *Duch pyszny poprzedza upadek. Rozważania o naturze procesu rozpadu unii*, Kraków 2012, pp. 16–39.

of the most eminent experts on the Kalmar Union in Poland, that the idea of resuming research into the history of both unions from a comparative point of view was reintroduced. His long-standing studies resulted in a number of articles devoted to union-related issues,⁷ which culminated in the aforementioned monograph on the political cooperation between the states of the Polish-Lithuanian Union and the Kalmar Union in the years 1411–1425.⁸

The proposal to renew and extend comparative work on both unions is still topical. As noted by Antoni Mączak, succinctly describing the Kalmar Union, “it is sometimes compared to the treaty ratified by Poland and Lithuania in Kreva”, and “analogies do indeed exist, but differences are also important”.⁹ Robert Frost has also recently drawn attention to this, pointing out similarities and differences between the act ratified in Kreva and the union documents constituting the legal basis of the Kalmar Union.¹⁰

What encourages comparison, is the fact that the beginnings of the creation of both great state organisms date back to the end of the 14th century: the treaty of Kreva was ratified in 1385, and the Kalmar Union in 1397. On the other hand, however, in contrast to the Scandinavian states which at that time formed a community,

⁷ Z.H. Nowak, *Walka Danii o Szlezwik i Polski o Pomorze w pierwszej połowie XV w. Uwagi na płaszczyźnie porównawczej*, “Acta Universitatis Nicolai Copernici. Nauki Humanistyczno-Społeczne. Historia” 1973, Vol. 9(58), pp. 99–111; idem, *Kilka uwag o świadomości narodowej i państwowej w Danii w pierwszej połowie XV wieku*, “Acta Universitatis Nicolai Copernici. Nauki Humanistyczno-Społeczne. Historia” 1980, Vol. 17(117), pp. 93–107; idem, *Krewo i Kalmar. Dwie unie późnego średniowiecza w północnej i wschodniej Europie*, in: *W kręgu stanowych i kulturowych przeobrażeń Europy Północnej w XIV–XVIII wieku*, ed. Z.H. Nowak, Toruń 1988, pp. 57–75; idem, *Kilka uwag w sprawie kandydatury księcia pomorskiego Bogusława IX na króla unii kalmarskiej*, in: *Balticum. Studia z dziejów polityki, gospodarki i kultury XII–XVII wieku ofiarowane Marianowi Biskupowi w siedemdziesiątą rocznicę urodzin*, ed. Z.H. Nowak, Toruń 1992, pp. 235–239; idem, *Królowe Małgorzata i Jadwiga – dwie unie w północnej i środkowowschodniej Europie*, “Zapiski Historyczne” 1997, Vol. 62, No. 2–3, pp. 7–16.

⁸ Idem, *Współpraca polityczna*, p. 158.

⁹ *Historia Europy*, p. 208.

¹⁰ R. Frost, *Oksfordzka historia Unii Polsko-Litewskiej*, pp. 104–105.

Poland and Lithuania were at very different stages of social, political, legal, and institutional development.¹¹

The main objective of this two-part publication is to present the origins and reasons for the creation of both unions (part 1), their legal foundations and further fate (part 2), and above all to draw once again attention to the need for comparative research – over the past three decades quite a few studies have been published concerning both the Polish-Lithuanian Union and the Kalmar Union, but without taking into account comparative aspects. On the other hand, these works contain many undoubtedly new, valuable, and inspiring findings, which make it possible to take a deeper look at them in terms of mutual similarities, and especially, as it seems, the differences between them.

More recent studies on the Polish-Lithuanian Union include works by Robert Frost, Mečislovas Jučas, Stephen Rowell, Grzegorz Błaszczyk, Waclaw Uruszczak, Henryk Wisner, and many other researchers.¹² As far as the Kalmar Union is concerned, the period

¹¹ Ibidem, p. 112 et seq.

¹² For a discussion of the older literature see J. Adamus, *Państwo litewskie w latach 1386–1392*, Wilno 1932, pp. 4–9; H. Paszkiewicz, *O genezie i wartości Krewa*, Warszawa 1938, pp. 235–236; J. Bardach, *Krewo i Lublin. Z problemów unii polsko-litewskiej*, „Kwartalnik Historyczny” 76, 1969, No. 3, pp. 584–589; idem, *Krewo i Lublin* (1970), pp. 21–25; M. Jučas, *Unia polsko-litewska*, trans. A. Firewicz, Toruń 2003, pp. 41–80 (the author also presents in detail on pp. 10–40 of this work the older and more recent Lithuanian, Belorussian, Ukrainian, Russian, and German literature); G. Błaszczyk, *Dzieje stosunków polsko-litewskich od czasów najdawniejszych do współczesności*, Vol. 1: *Trudne początki*, Poznań 1998, Vol. 9–17; idem, *Dzieje stosunków polsko-litewskich*, Vol. 2, P. 1, Poznań 2007, pp. 15–24. From the more recent literature, the following should be mentioned, among others: R. Frost, *Oksfordzka historia Unii Polsko-Litewskiej*; M. Jučas, *Unia polsko-litewska*; G. Błaszczyk, *Dzieje stosunków polsko-litewskich od czasów najdawniejszych*, Vol. 1; idem, *Dzieje stosunków polsko-litewskich*, Vol. 2; S. Rowell, *Lithuania Ascending. A Pagan Empire within East-Central Europe, 1295–1345*, Cambridge 1994 (Polish trans. *Pogańskie imperium. Litewska dominacja w Europie Środkowo-Wschodniej 1295–1345*, trans. G. Smółka, Oświęcim 2017); W. Uruszczak, *Unio regnorum sub una corona non causat eorum unitatem. Unia Polski i Litwy w Krewie w 1385 r. Studium historyczno-prawne*, Kraków 2017; H. Wisner, *Unia. Sceny z przeszłości Polski i Litwy*, Warszawa 1988; H. Litwin, *Zjednoczenie narodów crunchy: polskiego, litewskiego, ruskiego. Wołyń i Kijowszczyzna w Unii Lubelskiej*, Warszawa 2019; *Unia Lubelska z 1569 roku. Z tradycji unifikacyjnych*

mentioned above saw the publication of works by Aksel Erhardt Christensen, Michael Linton, Jens Ejnar Olesen, Vivian Etting, Lars-Olof Larsson, Esben Albrechtsen, and Harald Gustafsson.¹³

I Rzeczypospolitej, eds. T. Kempa, K. Mikulski, Toruń 2011; J. Wyrozumski, *Formowanie się politycznej i ustrojowej wspólnoty polsko-litewskiej w latach 1385–1501*, “Czasopismo Prawno-Historyczne” 45, 1993, No. 1–2, pp. 445–455; M. Koczerska, *Autentyczność dokumentu unii krewskiej 1385 roku*, “Kwartalnik Historyczny” 99, 1992, No. 1, pp. 59–78; J. Kiaupienė, *Historiografija litewska o niektórych zagadnieniach stosunków polsko-litewskich między Krewem a Lublinem*, in: *Profesor Henryk Łowmiański: życie i dzieło. Materiały z sesji naukowej, poświęconej dziesiątej rocznicy śmierci Uczzonego* (Poznań, 7–8 X 1994 r.), eds. A. Kijas, K. Pietkiewicz, Poznań 1995, pp. 116–123; idem, *Akt krewski 14 sierpnia 1385 r. Gdzie kryje się problem – w dokumencie czy w jego interpretacjach?*, “Kwartalnik Historyczny” 108, 2001, No. 4, pp. 47–62; A. Rachuba, J. Kiaupienė, Z. Kiaupa, *Historia Litwy. Dwugłós polsko-litewski*, Warszawa 2009; J. Tęgowski, *Wprowadzenie w życie postanowień aktu krewskiego w latach 1385–1399*, “Studia z dziejów Państwa i Prawa Polskiego” 9, 2006, pp. 77–91; J. Nikodem, *Akt krewski i jego znaczenie*, in: *Poznań – Wilno. Studia historyczne w roku tysiąclecia Państwa Litewskiego*, ed. Z. Wojtkowiak, Poznań 2010, pp. 111–143; idem, *Jadwiga, król Polski*, Wrocław 2009; A. Zakrzewski, *Between the Union of Lublin and the Mutual Pledge of the Two Nations*; T. Kempa, *The Attitude of Ruthenian Magnates and Nobles toward the Union of Lublin (1569) and the Problem of the Autonomy of Ukrainian Lands within the Polish-Lithuanian Commonwealth*, “Zapiski Historyczne” 2019, Vol. 84, No. 4, pp. 41–72; A. Kalinowska, *Through a Glass Darkly: British Representations of the Polish-Lithuanian Union in the Late-16th and 17th Centuries*, “Lithuanian Historical Studies” 2021, Vol. 25, pp. 1–29.

¹³ Of the older literature, the following monographs and syntheses should be mentioned in particular: H. Koht, *Drottning Margareta och Kalmarunionen*, Stockholm 1956; E. Lönnroth, *Sverige och Kalmarunionen 1397–1457*, Göteborg [1934] 1969; M. Linton, *Drottning Margareta. Fullmäktig fru och rätt husbonde*, Århus 1971; idem, *Kalmarunionen: historiske kilder*, ed. R. Thomsen, Copenhagen 1974; S. Imsen, J. Sandnes, *Norges historie*, Vol. 4: *Avfolkning og union 1319–1448*, ed. K. Mykland, Oslo 1976, pp. 248 et seq.; P. Enemark, *Fra Kalmarbrev til Stockholms blodbad. Den nordiske trestatsunionen epoke 1397–1521*, København 1979; A.E. Christensen, *Kalmarunionen og nordisk politik 1319–1439*, København 1980; and moreover articles: G. Carlsson, *Kalmarunionen. Till frågan om rättsgiltigheten av 1397 års unionsavtal*, “Historisk Tidsskrift (Sverige)” 1930, pp. 405 et seq.; L. Weibull, *Unionsmötet i Kalmar 1397*, “Scandia” 1930, Vol. 3, pp. 185–222; idem, *1397 års unionsbrev och dess rättsgiltighet*, “Scandia” 1931, Vol. 4, pp. 115–142; E. Lönnroth, *Unionsdokumenten i Kalmar 1397*, “Scandia” 1958, Vol. 24, pp. 32–67; P. Enemark, *Christian I og forholdet til Sverige 1448–1454*, “Historie/Jyske Samlinger” 14, 1981–1983, No. 3, pp. 440–492. From the most recent literature see J.E. Olesen, *Erik*

Taking into account their abundance and scholarly value, and at the same time keeping in mind the language barrier which still hinders such research, and finally, as should be made clear, their own interests, the authors wish to focus primarily on the Kalmar Union. The aim of the first part of the publication is to highlight in particular the differences and similarities between the two state unions, with an emphasis on the origins of both unions, hence, the attempt to draw attention in particular to the causes of their establishment, i.e. aspects which fundamentally influenced the further history of the union.¹⁴ The purpose of the second part of

af Pommern og Kalmarunionen. Regeringssystemets udformning 1389–1439, in: *Danmark i senmiddelalderen*, eds. P. Ingesman, J.V. Jensen, Aarhus 1994, pp. 143–165; idem, *Inter-Scandinavian relations*, in: *The Cambridge History of Scandinavia*, Vol. 1: *Prehistory to 1520*, ed. K. Helle, Cambridge 2003, pp. 710–771; idem, *Erich von Pommern und Christopher von Bayern. Studien zur Kalmarer Union*, Greifswald 2016; L.-O. Larsson, *Kalmarunionens tid. Från Drottning Margareta till Kristian II. Kalmarunionens tid*, Stockholm 1997; V. Etting, *Margrete den første. En regent og hendes samtid*, København 1997; eadem, *Fra fællesskab til blodbad. Kalmarunionen 1397–1520*, København 1998; eadem, *Queen Margrete I (1353–1412) and the Founding of the Nordic Union*, Leiden–Boston 2004; E. Albrechtsen, *Danmark – Norge 1380–1814*, Vol. 1: *Fællesskabet bliver til (1380–1536)*, Oslo 1997, pp. 71–304; H. Barüske, *Erich von Pommern. Ein Lebensbild*, Rostock 1997; “*furu thet war tallet j kalmar*”. *Union und Zusammenarbeit in der Nordischen Geschichte. 600 Jahre Kalmarer Union (1397–1997)*, eds. D. Kattinger, D. Putensen, H. Wernicke, Hamburg 1997 (Greifswalder Historische Studien, Vol. 2); M. Linton, *Margrete den 1. Nordens dronning*, København 2000; A. Bøgh, *Sejren i kvindens hånd. Kampen om magten i Norden ca. 1365–8*, København 2003; H. Bjørkvik, *Aschehougs Norges historie*, Vol. 4: *Folketap og sammenbrudd 1350–1520*, Oslo 2005, pp. 193 et seq.; moreover articles: A.E. Christensen, *Christoffer af Bayern som unionskonge*, “Historisk Tidsskrift” 96, 1996, No. 2, pp. 269–312; O. Auge, *Ein Integrationsmodell des Nordens? Das Beispiel der Kalmarer Union*, “Vorträge und Forschungen” 63, 2005, pp. 509–542; H. Gustafsson, *A State that Failed? On the Union of Kalmar, Especially Its Dissolution*, “Scandinavian Journal of History” 2006, Vol. 31, No. 3–4, pp. 205–220; idem, *The Forgotten Union. Scandinavian Dynastic and Territorial Politics in the 14th Century and the Norwegian-Swedish Connection*, “Scandinavian Journal of History” 2017, Vol. 43, No. 5, pp. 560–582; M. Hedemann, *Unionsbrevets kongelige program og krigen om Slesvig*, “Scandia” 2011, Vol. 77, No. 2, pp. 38–72; J.E. Olesen, *Pommersche Aspekte in der Nordischen Unionspolitik des Königs Erich von Pommern*, “Studia Maritima” 2018, Vol. 31, pp. 61–85.

¹⁴ This has been emphasized by virtually all domestic scholars who have

this article is to present the legal foundations of the two unions, and – in principle only in general terms, especially with regard to the Polish-Lithuanian Union – the subsequent transformations in their character and principles of functioning. There is no doubt that any possible comparative approach should first and foremost focus on the commonality of the political, military and economic interests of the states which led to the ratification of the two unions and the circumstances in which this took place.

The genesis of the union was therefore firstly an external threat and a desire to protect the integrity of the territory. In both cases the threat came from the German element, but it was not entirely of the same character.¹⁵ As far as the states of the Kalmar Union are concerned, the main emphasis should be put on the economic rivalry between the Scandinavian merchants and the German-dominated Hansa.¹⁶ The northward expansion of the Hanseatic League threatened especially Norway, decimated by the plague. The country suffered massive demographic losses, which had a direct impact on its economic situation. Nearly two-thirds of the population died and victims came from all strata of society.¹⁷ The plague did not spare the rural areas, and so had a negative impact on agricultural production and led to a settlement crisis.¹⁸ Vast tracts of land lay fallow and trade was monopolized by the

attempted comparative studies of the two unions to date, either expressing this view explicitly or focusing on this particular period.

¹⁵ A. Bøgh, *On the causes of the Kalmar Union*, in: "huru thet war tallet j kalmar", pp. 9–30; More on the causes of the Polish-Lithuanian union see G. Błaszczak, *Dzieje stosunków polsko-litewskich od czasów najdawniejszych*, Vol. 1, p. 208 et seq.; R. Frost, *Oksfordzka historia Unii Polsko-Litewskiej*, p. 32 et seq.; M. Jučas, *Unia polsko-litewska*, p. 97 et seq.

¹⁶ H. Wernicke, *Die Hanse und die Entstehung der Kalmarer Union*, in: "huru thet war tallet j kalmar", pp. 171–197.

¹⁷ H. Bjørkvik, *Aschehougs Norges historie*, pp. 19–21; E. Albrechtsen, *Danmark – Norge 1380–1814*, p. 53; More on the plague epidemic in Scandinavia see O.J. Benedictow, *The Black Death, 1346–1353. The Complete History*, Woodbridge 2004, pp. 146–178.

¹⁸ S. Imsen, J. Sandnes, *Norges historie*, pp. 124–126; J. Mañłek, *Historia Norwegii (do roku 1814)*, pp. 211–219.

Hanseatic merchants from the northern German cities, whose expansive activities had an inhibiting effect on the growth and health of the native bourgeoisie.¹⁹ The main economic centre of the country became Bergen – a city where the Hanseatic League's cantor was located.²⁰ Norway also had Hanseatic factories in Oslo and Tønsberg.²¹

For all the Scandinavian countries, competition from North German towns in the Baltic herring trade and in the exploitation of Swedish copper and iron ore posed a great threat. As a result of the need to conserve herring with salt, mainly imported from Lüneburg, the herring market was monopolized by merchants affiliated to the Hanseatic League.²² As for the Swedish mining industry, it must be stressed that its development was particularly dependent on the purchasing power of German cities, above all Lübeck, which was the main importer of iron ore mined in the Bergslagen region, and of copper from Falun.²³ Trade in these goods was conducted with the help of a trading post located in Stockholm, whose magistrate was more than half German patricians.²⁴ Also not without significance in economic terms was the rivalry between the Hanseatic League and Denmark for dominion over the Sound, and in fact over the Baltic Sea, as well as the conflict over Gotland, the capital of which – Visby – was one of the most important centres of

¹⁹ E. Albrechtsen, *Danmark – Norge 1380–1814*, pp. 55, 60; H. Bjørkvik, *Aschehougs Norges historie*, pp. 124–128; M. Linton, *Kalmarunionen*, p. 15; J. Małek, *Historia Norwegii (do roku 1814)*, pp. 217–218; Z. Ciesielski, *Dzieje kultury skandynawskiej*, Vol. 1: *Od pradziejów do Oświecenia*, Gdańsk 2016, pp. 292, 295–296; A. Bereza-Jarociński, *Zarys dziejów Norwegii*, pp. 62–63; P. Żurawski vel Grajewski, *Duch pyszny poprzedza upadek*, pp. 16–17.

²⁰ Więcej na temat kantoru Hanzy w Bergen zob. A. Nedkvitne, *The German Hansa and Bergen 1100–1600*, Köln 2014; M. Burkhardt, *Der hansische Bergenhandel im Spätmittelalter. Handel-Kaufleute-Netzwerke*, Köln 2009.

²¹ Z. Ciesielski, *Dzieje kultury skandynawskiej*, p. 292.

²² M. Linton, *Kalmarunionen*, pp. 9, 35; W. Froese, *Historia państw i narodów Morza Bałtyckiego*, pp. 97–98; Z. Ciesielski, *Dzieje kultury skandynawskiej*, p. 292.

²³ P.E. Brolin, *Kalmarunionen*, Lund 1969, p. 9.

²⁴ W. Froese, *Historia państw i narodów Morza Bałtyckiego*, p. 86; Z. Ciesielski, *Dzieje kultury skandynawskiej*, p. 292.

trade in the Baltic Sea and until a short while earlier, the leading Hanseatic city in that basin.²⁵ The particular importance of the city was due to its geographical location on the sea trade route between Novgorod, Lübeck, Hamburg and Flanders, which was the centre of European trade at the time²⁶

The rivalry of the Hanseatic League with Scandinavian cities for trade on the Baltic Sea was not limited to economic competition, but often assumed an armed character.²⁷ An attempt by the Norwegian Regency Council to limit the privileges granted to Hansa merchants led to an economic blockade of the kingdom and an armed conflict at the end of the 13th century. The consequence of stopping the export of grain, which was almost entirely in the hands of the Hanseatic League, was a wave of famine, which forced the regents ruling in the name of the under-aged Eric II not only to capitulate, but above all to extend the rights of the Hanseatic League and pay substantial reparations.²⁸

In addition, both state unions faced from the beginning of their existence a number of political problems, namely German expansion and territorial claims caused, inter alia, by the demographic dynamism of the North German duchies – in the context of the future Kalmar Union, or the fact that the Teutonic Order was bringing colonists from Germany to Prussia and Inflants, as well as expanding its territorial possessions in the Baltic Sea – as in

²⁵ E. Albrechtsen, *Danmark – Norge 1380–1814*, p. 80; *Danmarks historie*, eds. J. Danstrup, H. Koch, *Jadwiga, król Polski* ol. 4: *Borgerkrig og Kalmarunion 1241–1448*, ed. E. Kjersgaard, København 1963, pp. 408–413; M. Linton, *Kalmarunionen*, p. 10; W. Czapliński, K. Górski, *Historia Danii*, pp. 113, 115; Z. Ciesielski, *Dzieje kultury skandynawskiej*, p. 293; W. Froese, *Historia państw i narodów Morza Bałtyckiego*, pp. 105–107; I. Andersson, *Dzieje Szwecji*, pp. 67–70.

²⁶ Z. Ciesielski, *Dzieje kultury skandynawskiej*, p. 291.

²⁷ In addition to Norway's dispute with the Hanseatic League, the 14th century saw a long-running war between the Hanseatic League and King Valdemar IV of Denmark for dominion over the Baltic Sea, which, after the Danish monarch's initial successes, ended in 1369 with Valdemar's surrender and the temporary loss of dominion over the Sound; T. Manteuffel, *Historia powszechna*, pp. 339–338.

²⁸ J. Małek, *Historia Norwegii (do roku 1814)*, pp. 188–189.

the case of the Polish-Lithuanian Union. It should be noted that in more recent historiography, the problem of German expansion is considered marginal from the point of view of the reasons for the creation of the Kalmar Union. Among the main reasons, the cultural and economic rivalry in the Baltic Sea between Hanseatic and Scandinavian merchants is mentioned.²⁹

Therefore, it can be said that at the turn of the 14th and 15th centuries, the Order continued to pose a constant threat to the lands of both the Grand Duchy of Lithuania and the Kingdom of Poland.³⁰ In the case of the Polish-Lithuanian Union, it is generally accepted that the main reason for the union was the desire to unite the forces of Lithuania and Poland in order to jointly defeat the Order's power, and that the unification of the two states was directed primarily against the Order, as the political and military situation at the time might have suggested.³¹ The most common argument is that Lithuania, as a pagan country, was a regular target of the Teutonic Knights' voyages and the expeditions of the Livonian Order, which were in fact aimed primarily at conquering Žemaitija, located on the lower reaches of the Nemunas, the westernmost part of Lithuania, which was a bridge between the Prussian lands and

²⁹ See e.g. M. Linton, *Kalmarunionen*, p. 16.

³⁰ For the sake of accuracy, however, it should be recalled that after the ratification of the "perpetual peace" with the Teutonic Knights in Kalisz (1343), Poland remained at peace with the Order for nearly half a century, until 1409. It was primarily the Lithuanians who needed help in fighting the Order. According to Robert Frost, "apart from frequent minor border clashes, between 1345 and 1382 the Teutonic Knights conducted ninety-six raids on Lithuanian territory"; R. Frost, *Oksfordzka historia Unii Polsko-Litewskiej*, p. 75; cf. G. Błaszczuk, *Dzieje stosunków polsko-litewskich od czasów najdawniejszych*, Vol. 1, p. 148; S. Szczur, *Traktat pokojowy Kazimierza Wielkiego z zakonem krzyżackim z 1343 roku*, "Zapiski Historyczne" 1991, Vol. 56, No. 4, pp. 23–24.

³¹ At least from the beginning of the 13th century the Lithuanians undertook many plundering expeditions to the Polish lands. However, one should not forget about later attempts at joint military actions against the Order or its allies; G. Błaszczuk, *Dzieje stosunków polsko-litewskich od czasów najdawniejszych*, Vol. 1, p. 33 et seq., 106 n., p. 130 et seq.; M. Jučas, *Unia polsko-litewska*, p. 83; R. Frost, *Oksfordzka historia Unii Polsko-Litewskiej*, pp. 67–68; S. Rowell, *Lithuania Ascending*, pp. 224–225; M. Biskup, *Wojny Polski z Zakonem Krzyżackim 1308–1521*, Gdańsk 1993, p. 36.

the Order's possessions in Livonia,³² and at cutting off the Grand Duchy from the Baltic Sea.³³

The previous cutting off of Poland from direct access to the Baltic coast, which took place during the regional disintegration, is one of the most crucial problems which the Polish rulers tried to solve, starting from Mieszko the Old, through Przemysław II, Ladislaus the Short, Casimir the Great, Ladislaus Jogaila, or Casimir Jagiellon. The problem of the loss of those lands concerned both East Pomerania and the previously lost sovereignty over Western Pomerania (Oder Pomerania), the former being part of Mieszko I's state, the latter being subordinated to him around 967–972. On those lands such towns developed as Gdańsk, Szczecin, Wolin, Kołobrzeg, Kamień, and Białogard. They developed to a considerable extent thanks to communication with the hinterland, the development of trade and crafts, and the Baltic (and long-distance) exchange and fishery. They were therefore important first and foremost as a vital element of economic activity, but at the same time they played an important role in the military system of the societies living there at that time.³⁴ It is worth adding that the issue of the further fate of West Pomerania is also closely connected with the genesis of the Kalmar Union, and in particular with that of Duke Eric of Pomerania, who, next to Queen Margaret, was the key figure associated with its ratification, as both Antoni Prochaska and

³² In 1237 the Order of the Cavaliers of the Sword and the Teutonic Order were united.

³³ The conquest of Žemaitija by the Order would have meant cutting off Lithuania and the western Ruthenian lands from access to the Baltic Sea and would have made their direct trade links with Western Europe much more difficult; for more on the territorial expansion of the Teutonic Order, which threatened Poland and Lithuania, see *Państwo zakonu krzyżackiego w Prusach. Władza i społeczeństwo*, eds. M. Biskup, R. Czaja, Warszawa 2008.

³⁴ L. Leciejewicz, *U źródeł bogactwa i potęgi Pomorza Zachodniego w średniowieczu*, in: *Szkice z dziejów Pomorza*, Vol. 1, ed. G. Labuda, Warszawa 1958, pp. 8–10, 13–15, 23–30; idem, *Działalność Pomorzan na Bałtyku (żegluga, porty, rybołówstwo)*, in: *Historia Pomorza*, Vol. 1, Part 1, ed. G. Labuda, Poznań 1969, pp. 273–278; B. Dopierała, *Polskie losy Pomorza Zachodniego*, Poznań 1970, s. 22.

Oskar Halecki pointed out, extensively considering the fate of this land in connection with the history of the Scandinavian states.

A close agreement between Lithuania and the Crown was also intended to stabilize the western borderlands of the Grand Duchy, allowing the Lithuanian dukes and boyars to engage in the eastern expansion which had been underway since the 13th century, and to effectively resist the Tartar incursions threatening the southern areas of the Grand Duchy. On the other hand, the Polish magnates (primarily the lords of Małopolska,³⁵ but also the cities of the district, led by Kraków) counted above all on regaining Halich Ruthenia, occupied *de facto* by Hungary, in spite of previous treaties, and Volhynia occupied by Lithuania.³⁶ This would enable the revival and further development of economic relations with Ruthenia, in which both the Polish and Lithuanian-Ruthenian bourgeoisie were

³⁵ G. Błaszczuk, *Dzieje stosunków polsko-litewskich od czasów najdawniejszych*, Vol. 1, pp. 227–230.

³⁶ Undoubtedly, the expansion into the Kingdom of Galicia-Volhynia, initiated by Casimir the Great in 1340 and lasting for more than a quarter of a century, generally carried out with the complicity of the Hungarians, seriously antagonized relations with Lithuania, which had long been involved in the struggle for the Ruthenian lands, bringing it major territorial gains in the east. The war over these lands lasted in total more than half a century. Both states were therefore keenly interested in reaching an agreement on the Kingdom of Galicia-Volhynia, over which there had been a long-standing rivalry, especially as their political situation in the 1480s had become additionally complicated – on Poland's side there were, among other things, internal disputes and struggles after the death of Louis I (1382), having to do with the matter of succession and the breaking off of the personal union with Hungary, where his elder daughter Maria (1384) ascended the throne – on the Lithuanian side, the position of Jogaila was particularly difficult, as in 1382 he was forced to cede to the Teutonic Knights, in order to thwart their help for Vytautas, a large part of Žemaitija and make a promise to be baptized, and then he sought an alliance with Dmitry Donskoy. The expected marriage with the daughter of the Grand Duke of Moscow, Sophia, did not take place, neither did the mutual agreement, as it was obvious that the Moscow ruler expected Jogaila to recognize his supremacy or at least superiority; G. Błaszczuk, *Dzieje stosunków polsko-litewskich od czasów najdawniejszych*, Vol. 1, p. 151 et seq., pp. 164–165; R. Frost, *Oksfordzka historia Unii Polsko-Litewskiej*, pp. 74; J. Wyrozumski, *Kazimierz Wielki*, Wrocław 1982, pp. 83–87; H. Paszkiewicz, *Polityka ruska Kazimierza Wielkiego*, Warszawa 1925, p. 50 et seq.; S. Rowell, *Lithuania Ascending*, pp. 268–269.

interested. The conquest of Ruthenian lands also promised a significant increase in revenue for the treasury. Moreover, the Crown was able to gain security on its eastern borders, which until then had been the target of Lithuanian raids.³⁷ Both states thus became potential allies, not only in military skirmishes with the Order or with Moscow, which was claiming the Ruthenian lands seized by Lithuania and Poland, but also, as mentioned above, in order to secure their economic interests, especially those connected with the further development of trade, which shows us a certain similarity with the Kalmar Union.

For Denmark, the dispute with the Duchy of Holstein over Schleswig, called South Jutland by the Danes, which started in the 1350s, was a great threat to the integrity of the kingdom.³⁸ The dukes of Holstein, related to the rulers of Schleswig, supported the latter's efforts to abolish Danish sovereignty by means of an intensified settlement policy. Karol Górski even compared the colonization of South Jutland to the influx of German colonists into Silesia, mentioning as one of the effects of this process the Germanization of a Danish fief (formerly a district), and its subsequent separation from the Kingdom of Denmark.³⁹ Moreover, German nobles sat in the *Danehof*, the Danish state assembly, which was in fact a body protecting the interests of the secular and clerical magnates, which meant that their representatives were actively involved in the political life of the Kingdom. What is more, as a result of the pledge policy, nearly half of the royal estates fell

³⁷ For more on the rivalry between Poland and Lithuania in the Kingdom of Galicia and Volhynia see G. Błaszczuk, *Dzieje stosunków polsko-litewskich od czasów najdawniejszych*, Vol. 1, p. 33 et seq., 150 et seq., 170 et seq.; M. Jučas, *Unia polsko-litewska*, pp. 82, 86–87, 90–91.

³⁸ Władysław Czapliński is of the opinion that the issue of Schleswig and Holstein is – next to the question of union with the other Scandinavian states – the most important, unresolved problem with which Denmark entered the modern era; W. Czapliński, *Dzieje Danii nowożytnej*, pp. 24–25; cf. A. Gaca, *Kodeks Duński króla Chrystiana V z roku 1683*, Toruń 1992, pp. 116–117; idem, *Prawo Jutlandzkie (Jyske Lov) Waldemara II z 12141 roku*, Toruń 2007, pp. 275–284.

³⁹ W. Czapliński, K. Górski, *Historia Danii*, p. 86; cf. H. Barüske, *Erich von Pommern*, pp. 68–77; A. Bøgh, *On the causes*, pp. 14–16.

into German hands – the crisis of Danish statehood was so deep that in the years 1332–1340 there was a *de facto* partition of the kingdom, by, among others, the Counts of Holstein, which was accompanied by an almost eight-year interregnum, referred to in Danish historiography as the “German period”.⁴⁰

In Sweden, the main problem, which was the direct cause of the union and the prior call to the Swedish throne of the Norwegian-Danish queen Margaret, was the dispute of the local nobility with king Albrecht who had roots in Mecklenburg.⁴¹ In order to strengthen his position, this ruler brought to his new homeland his compatriots, whom he favoured by granting them high offices and castles, which caused widespread discontent among the Swedish lords. Moreover, after the death of one of the wealthiest representatives of the Swedish nobility, a *drots*,⁴² Bo Jonsson Grip, who had amassed a large complex of fiefs in the Kingdom of Sweden, the king tried to overturn the will of the deceased, according to which its executors were to be the local nobles.⁴³ The latter turned for help to the queens of Denmark and Norway. The treaty concluded in 1388 gave Margaret the title of “the rightful lady and hostess of Sweden”, and the nobility promised to surrender the most important castles in the kingdom to the queen, which was in a way a prelude to the ratification of the union.⁴⁴

A point of convergence in the genesis of both unions was also the fact that the supporters of this idea were the mighty of the

⁴⁰ W. Czaplinski, K. Górski, *Historia Danii*, pp. 106–107.

⁴¹ Albrecht succeeded to the throne following a revolt by the German part of the Swedish Kingdom Council, which, with the armed support of Mecklenburgers, Hanseatic, and German inhabitants of Kalmar and Stockholm, expelled the rightful king Magnus Eriksson from the country and proclaimed Albrecht the new ruler.

⁴² *Drots* – a high-ranking royal official in medieval Sweden.

⁴³ V. Etting, *Queen Margrete I*, pp. 52–53.

⁴⁴ Z.H. Nowak, *Współpraca polityczna*, pp. 14–15; idem, *Krew i Kalmar*, pp. 63–64; idem, *Kilka uwag w sprawie kandydatury*, p. 235; W. Czaplinski, K. Górski, *Historia Danii*, pp. 119–121; Z. Ciesielski, *Dzieje kultury skandynawskiej*, p. 300; W. Froese, *Historia państw i narodów Morza Bałtyckiego*, pp. 121–123; P. Żurawski vel Grajewski, *Duch pyszny poprzedza upadek*, pp. 17–18; J. Małek, *Historia Norwegii (do roku 1814)*, pp. 220–221.

union states, who were motivated by, *inter alia*, their particular interests. In the case of Scandinavia, it was primarily a matter of securing the border areas of the three kingdoms, within which clerical and secular lords owned considerable estates, e.g. Halland, Småland, Bohuslän, Värmland and Västergötland, and also conducted mutual business.⁴⁵ Moreover, it was in the vital interest of the councils of all three northern kingdoms, which after all included the greatest Scandinavian magnates, to limit the king's power by legally sanctioning the co-rulership of the king with the kingdom council and the electivity of the throne,⁴⁶ which Krystyna Szelągowska describes as aristocratic constitutionalism, a peculiar variant of the medieval concept of the rule of law.⁴⁷

The reasons for both unions are also to be found in the dynastic politics of the rulers and the problem of succession to the throne. In the case of Lithuania, the dispute which arose after the death of Algirdas (1377) between his brother Kęstutas, who was his co-ruler of Lithuania, and Algirdas' son Jogaila, who wanted to take over the Grand Ducal power on his own, was undoubtedly significant for the rapprochement of the two states in the near future. After Kęstutas was imprisoned and possibly murdered in Kreva (1382), the conflict within the ruling family in Lithuania escalated, fueled by the Order, and Kęstutas's son Vytautas sought help from the Teutonic Knights, to whom he had fled after his father's death. Captured by Jogaila, he returned to Lithuania in 1384, taking possession of Hrodna, Podlasie, and Brest, and took part in the

⁴⁵ J.E. Olesen, *Erich von Pommern*, pp. 14–15; M. Linton, *Kalmarunionen*, p. 15; Z.H. Nowak, *Współpraca polityczna*, p. 18; idem, *Krewo i Kalmar*, p. 66.

⁴⁶ On the other hand, as Robert Frost has rightly pointed out, the programme of the magnates outlined in the Act of Union, aimed at limiting the power of the crown, was formulated after Eric's coronation. Margrethe and Eric were thus able to ignore it and rule on the basis of the coronation letter, which sets the limits of the concessions they were prepared to make. Similarly, once Jogaila was crowned and his Polish subjects took an oath of allegiance to him, they lost the opportunity to force him to specify the vague terms of the royal act, see R. Frost, *Oksfordzka historia Unii Polsko-Litewskiej*, p. 105.

⁴⁷ K. Szelągowska, *My Norwegowie. Tożsamość narodowa norweskich elit w czasach nowożytnych*, Kraków 2011, p. 44; M. Linton, *Kalmarunionen*, p. 15.

negotiations on the Polish-Lithuanian Union.⁴⁸ Undoubtedly, the union with Poland created a real opportunity for Jogaila to increase the prestige of the Lithuanian state and to fulfil his own ambitions – not only to obtain the royal crown, but also to strengthen his position vis-à-vis his cousin Vytautas, primarily by centralizing grand ducal power, and so weakening the position of the other Gediminas in Lithuania.⁴⁹

As for Scandinavia, it should be noted that the idea of union – like the earlier attempts to bring Poland and Lithuania together – was not a complete *novum*. As noted by Bernard Piotrowski, aspirations to unite Scandinavia can be first observed at the turn of the 13th and 14th centuries, when the Hanseatic League was at the peak of its power, at the same time posing a threat to the economic interests of certain groups of Scandinavian societies.⁵⁰ The first personal union was ratified in 1319 between Norway and Sweden, ending with the dethronement of King Magnus Eriksson and the election of Albrecht von Mecklenburg as Sweden's new ruler.⁵¹ As the Danish historian Anders Bøgh has rightly pointed out, it was the rivalry between the House of Mecklenburg and the native Folkung dynasty for the Swedish throne that constituted one of the main reasons for the ratification of the union.⁵²

⁴⁸ M. Jučas, *Unia polsko-litewska*, pp. 98–102.

⁴⁹ G. Błaszczuk, *Dzieje stosunków polsko-litewskich od czasów najdawniejszych*, Vol. 1, p. 215 et seq.

⁵⁰ B. Piotrowski, *Tradycje jedności Skandynawii*, pp. 27–30, 33–34; Z.H. Nowak, in spite of citing Axel Christiansen, believes that until the 14th century it is not possible to point to any unionist concepts in Scandinavia, as they only appeared during the regency of Margaret in Denmark and Norway, idem, *Krewa i Kalmar*, p. 63.

⁵¹ According to Harald Gustafsson, the Norwegian-Swedish Union was not broken, as Magnus Eriksson and his son Håkon VI still held sway over the western parts of Sweden. This state of affairs was also to continue during the reigns of Olaf and Margaret, until the Kalmar convention. The author has also drawn attention to the so far underestimated role of the Norwegian-Swedish Union in the fate of the Kalmar Union; see idem, *The Forgotten Union*, pp. 560–582; cf. I. Andersson, *Dzieje Szwecji*, pp. 54, 57; A. Kersten, *Historia Szwecji*, pp. 73, 89.

⁵² A. Bøgh, *On the Causes*, p. 16; idem, *Sejren i kvindens hånd*, p. 18 et seq.

In 1380 another Scandinavian union was established. On the hereditary Norwegian throne sat the ten year old King Olaf of Denmark, whose deceased father, King Håkon VI, was married to the only daughter of the Danish King Valdemar IV (d. 1375) – Margaret and son of the already mentioned Magnus Eriksson, which gave him and his descendants the right to the Swedish throne. Thus, the union had at its inception a dynastic structure, based on strong connections between ruling and noble families.⁵³

The drive for unification gained momentum after Olaf's death in 1387 and the assumption of the regency by Margaret, who, as already mentioned, in 1388 was granted the status of "sovereign lady and rightful ruler of Sweden", which, with her authority, elevated her almost to royal majesty. As with the Crown, this represented a break in the previous tradition of the Northern states. Although Margaret, unlike Jadwiga, was not crowned king, as the Koszyce Privilege allowed for such a possibility in Poland, while in Scandinavia it was not possible, after Olaf's death she retained the title of *fuldmægtig frue og rette husbonde og Danmark og Norges riges formynder* (the rightful lady, hostess and protector of the kingdoms of Denmark and Norway), which a year later was extended to include Swedish honours.⁵⁴ In both cases – which should be very clearly emphasized – the problem of the lack of a male descendant surfaced. Therefore, it became necessary to choose a successor to the throne, and the assumption of power by a woman constituted a fundamental break in the hitherto systemic tradition of both the Scandinavian states,⁵⁵ and the Polish monarchy. It is also worth

⁵³ H. Gustafsson, *A State that Failed?*, p. 207; L. Lagerqvist, *Historia Szwecji*, trans. H. Thylwe, Sztokholm 2002, p. 29; G.A. Blom, *Norge i union på 1300-tallet. Kongedømme, politikk, administrasjon og forvaltning 1319–1380*, Vol. 1: *Kongefjellskapet med Sverige 1319–1350*, Trondheim 1992, p. 39; S. Imsen, J. Sandnes, *Norges historie*, p. 296; S. Bagge, K. Mykland, *Norge i dansketiden*, Oslo 1987, pp. 11–14; H. Bjørkvik, *Aschehougs Norges historie*, pp. 201–203.

⁵⁴ E. Albrechtsen, *Danmark – Norge 1380–1814*, pp. 85–92; V. Etting, *Margrete den første*, p. 68; H. Bjørkvik, *Aschehougs Norges historie*, pp. 203–205; Z.H. Nowak, *Krewa i Kalmar*, p. 64.

⁵⁵ In the 13th century, Queen Margaret Sambiria, ruling on behalf of her minor son Eric V, sent a request to the Pope for permission for a woman to

remembering that after the death of Louis of Hungary the Crown remained in a period of interregnum, in which fierce disputes about his succession weakened the state considerably. An even deeper internal crisis was experienced by Lithuania after the death of Algirdas.⁵⁶ It seems that in the context of Margaret and Jadwiga taking the thrones and their importance at the beginning of both unions, it would be worthwhile to compare the role of these two rulers in the creation and establishment of the state unions in question, indicating any differences or similarities.

Finally, the Polish-Lithuanian Union was underpinned by social and religious reasons, which definitely cannot be said about the Kalmar Union. The Grand Duchy of Lithuania was a bi-ethnic state with a predominantly Ruthenian population and a Lithuanian minority constituting up to 20% of the population. Despite such a large disproportion, the power in the principality rested in the hands of the Lithuanian lords and boyars, who were the ruling class, discriminating against the Ruthenians. Juliusz Bardach rightly observed that the union with Poland was supposed to make it easier for the Lithuanian dukes and boyars to maintain control over the numerically superior Ruthenian population within the Grand Duchy.⁵⁷ It was also designed to prevent the dispersion of the pagan Lithuanians into the sea of the Ruthenian element – defeated, but dominant in terms of culture and civilization, not

succeed to the Danish throne in the event that Eric V did not produce a male heir. In a diploma dated 1263, the pope allowed the king's eldest daughter to succeed to the Danish throne in the absence of a male heir, and in the event of the king's heirless death, his eldest sister could succeed to the throne. However, these arrangements did not receive official sanction owing to the birth of male descendants of King Eric; see G. Jacobsen, *Less Favored – More Favored: Queenship and the Special Case of Margrete of Denmark, 1353–1412*, Copenhagen 2005, p. 6: http://www5.kb.dk/export/sites/kb_dk/da/nb/publikationer/fundogforskning-online/pdf/A16A_Jacobsen-ENG.pdf (access: 12.12.2021).

⁵⁶ G. Błaszczyk, *Dzieje stosunków polsko-litewskich od czasów najdawniejszych*, Vol. 1, p. 208 et seq.

⁵⁷ J. Bardach, *Krewa i Lublin* (1969), p. 589; cf. H. Łowmiański, *Uwagi w sprawie podłoża społecznego i gospodarczego unji jagiellońskiej*, in: *Księga pamiątkowa ku uczczeniu czterechsetnej rocznicy wydania pierwszego Statutu Litewskiego*, Wilno 1935, pp. 245–246.

to mention the fact that the adoption of baptism in the Latin rite may have seemed a radical, but at the same time the only and effective way to stop the Teutonic Order from “forcibly” imposing Christianization on Lithuania, especially since most Lithuanian magnates were certainly not interested in Christianization under the auspices of the Order.⁵⁸

Finally, the adoption of Christianity allowed Lithuania to enter *Christianitas* – the general European inter-state and civilizational community, and denied the Teutonic Order the possibility of territorial expansion under the pretext of converting the pagan inhabitants of the Grand Duchy. At the same time, the adoption of Christianity in the Roman Catholic rite protected the Lithuanian part of the nobility from the rise of the importance of the Ruthenians, which could have occurred in the case of baptism in the Orthodox rite. One should also not forget about the benefits from the religious aspect on the part of Poland. The baptism of Lithuania and the subordination of the Lithuanian Church to the metropolis in Gniezno undoubtedly contributed to the growth of Poland’s prestige in the international arena, e.g. by gaining the support of the Holy See.⁵⁹

As far as the Scandinavian societies are concerned, partly disregarding Denmark and its problem with South Jutland (Schleswig) and the policy of the Counts of Holstein, apart from a small German-speaking minority, mainly living in the towns, these countries were, at least in this period, quantitatively dominated by the local

⁵⁸ It was already in the 1450s that Casimir the Great had come up with the initiative to Christianize Lithuania, provided that it would be subordinate to the Archbishopric of Gniezno; G. Błaszczuk, *Dzieje stosunków polsko-litewskich od czasów najdawniejszych*, Vol. 1, p. 153 et seq.; M. Jučas, *Unia polsko-litewska*, p. 84 et seq.

⁵⁹ G. Błaszczuk, *Dzieje stosunków polsko-litewskich od czasów najdawniejszych*, Vol. 1, p. 224; R. Frost, *Oksfordzka historia Unii Polsko-Litewskiej*, p. 125 et seq. On the meaning and course of the baptism, the special role of Jogaila, but also of Vytautas in its implementation and the evaluation of their contemporary efforts to Christianize Lithuania, see M. Jučas, *Unia polsko-litewska*, p. 110 et seq.; H. Łowmiański, *Uwagi w sprawie podłoża społecznego i gospodarczego unji jagiellońskiej*, pp. 245–246; cf. R. Frost, *Oksfordzka historia Unii Polsko-Litewskiej*, p. 63 et seq.

population. Moreover, all three kingdoms had long belonged to the community of the Roman Catholic Church, shared common traditions and linguistic proximity, and in terms of cultural development were on roughly the same level.

SUMMARY

The Kalmar Union and the Polish-Lithuanian unions (part 1) – origins and causes of establishment

The primary purpose of the authors is to draw attention to the need for continued comparative research into the Polish-Lithuanian unions and the Kalmar Union. The study presents mainly thoughts on the origins of both unions and the early stages of the formation of those state entities. A comparative analysis has been carried out for, among others, the time of their creation together with their causes and circumstances put in the context of the stages of the social, legal-political, and institutional development of the member states (part 1). The article also outlines the later history and transformations of these unions: both their factual and legal character, as well as the regulations of their functioning and consequences (part 2). These questions are presented mainly in a comparative way, with consideration of differences and similarities between the two unions. The authors bring out the problems of a political, social, and economic nature, together with the dynastic policy of the united states; next, they describe similarities between the regulations of the unions regarding the order of succession to the throne. The subject of a synthetic comparison is also the later history of the two unions after they formally ended and their impact on the historical development of both Poland and Lithuania and the northern states.

Still, one of the most important issues seems to be the answer to the question why both of the unions wasted their considerable political and military potential for joint action and new opportunities to achieve common political aims in northern and eastern Europe. It would be worthwhile to compare their durability and influence on the future of their member states. One of the leading research proposals based on the attempts made so far is to compare the subsequent stages, transformations, and results, both direct and long-lasting, of the analyzed unions of the states.

The adoption of such a broad research perspective which is only outlined here, and then an attempt at a more comprehensive synthesis requires, in the authors opinion, the collective efforts of many scholars,

and especially the international cooperation of historians specializing in Polish-Lithuanian and Swedish-Danish-Norwegian relations as well as the history of the Teutonic Order and the Hanseatic League.

Keywords: the Polish-Lithuanian unions; the Kalmar Union; state entities; a comparative way

STRESZCZENIE

Unia kalmarska a unie polsko-litewskie (cz. 1) – geneza i przyczyny powstania

Głównym celem autorów jest zwrócenie uwagi na potrzebę kontynuowania badań porównawczych unii polsko-litewskich z unią kalmarską. Tekst zawiera przede wszystkim rozważania na temat przyczyn powstania i początków tworzenia tych związków państwowych. Przedmiotem porównania są m.in. czas i przyczyny ich powstania oraz okoliczności ich zawarcia, a także etapy rozwoju społecznego, politycznego, prawnego i instytucjonalnego państw je tworzących (cz. 1). Artykuł dotyczy również potraktowanych skrótowo dalszych dziejów i późniejszych przeobrażeń charakteru tych związków: zarówno faktycznego, jak i prawnego, a także zasad funkcjonowania i skutków (cz. 2). Kwestie te zostały zaprezentowane przede wszystkim w ujęciu komparatystycznym, z uwzględnieniem wzajemnych różnic i podobieństw obu unii. Poruszono zarówno problemy natury politycznej, jak też społecznej i gospodarczej. Uwzględniona została także polityka dynastyczna w przypadku zjednoczonych państw oraz podobieństwo między uniami na poziomie problemów związanych z sukcesją tronu. Przedmiotem syntetycznego porównania są również losy obu związków unijnych po ich formalnym ustaniu oraz ich wpływ na dalszy rozwój dziejowy zarówno Polski i Litwy, jak i poszczególnych państw północnych.

Ciągle bardzo istotne wydaje się znalezienie odpowiedzi na pytanie, dlaczego obie unie nie wykorzystały swego wielkiego potencjału politycznego i militarnego do wspólnego działania, a nowych możliwości do realizacji wspólnych celów politycznych w północnej i wschodniej Europie. Szczególnie uzasadnionym postulatem badawczym, nawiązującym do dotychczas podejmowanych prób, jest porównanie kolejnych etapów, transformacji i skutków, zarówno bezpośrednich, jak i długotrwałych, obu związków państwowych.

Przyjęcie tak rozległego zakresu badań porównawczych, a następnie ewentualna próba dokonania szerszej syntezy wymagają zdaniem autorów

podjęcia zbiorowego wysiłku wielu badaczy, a zwłaszcza międzynarodowej współpracy znawców problematyki stosunków zarówno polsko-litewskich, jak i szwedzko-duńskiego-norweskich oraz dziejów zakonu krzyżackiego i Hanzy.

Słowa kluczowe: unie polsko-litewskie; unia kalmarska; związki państwowe; ujęcie komparatystyczne

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