



Young Researchers and the Problems of Polish Rural Areas

editors Katarzyna Zajda, Sylwia Michalska

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Katarzyna Zajda – University of Łódź, Faculty of Economics and Sociology
Institute of Sociology, Department of Rural and Urban Sociology
90-214 Łódź, Rewolucji 1905 r. No 41

Sylvia Michalska – Polish Academy of Sciences
IRWiR PAN / Institute of Rural and Agricultural Development
00-330 Warszawa, Nowy Świat 72

REVIEWER

Imre Kovách

PUBLISHING EDITOR

Bogusława Kwiatkowska

TYPESETTING

Munda – Maciej Torz

COVER DESIGN

Łukasz Orzechowski

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INTRODUCTION

Villages and their residents have for many years been an important subject of research in Poland. Rural areas (making up 93% of the surface area of the country and inhabited by over 39% of the population) are currently the scene of many economic and socio-cultural changes.

Publications devoted to rural areas refer to various problems occurring there. They refer to transformations in the socio-professional structure of rural areas, connected to among others with the decreasing number of farmers, especially smallholders (e.g. Halamska 2011, 2014; Frenkel 2012, 2014), changes in the agrarian structure, including problems of small, family-owned farms, which are the basic organizational form in Polish agriculture (cf. e.g. Sikorska 2003; Halamska 2005, 2011; Józwiak 2007; Zegar 2007; Górlach 2009; Poczta 2012; Dzun 2014), or opportunities for multifunctional and sustainable development (cf. e.g. Kaleta 2005; Kłodziński 2005, 2012; Wilkin 2010; Błąd 2011; Nurzyńska 2014; Górlach 2013). Researchers also take up issues connected with the social capital of rural residents (Kamiński 2010; Podedworna, Ruszkowski 2008; Starosta 2012; Zajda 2011, 2014; Fedyszak-Radziejowska 2012, 2014), the potential of their socio-political participation (Pankowski 2012; Głuszyński 2014; Zajda 2015), opportunities and ambitions of young people living in rural areas (Szafranec 2010), processes of demarginalization and creating equal opportunities, including the sphere of education (Psyk-Piotrowska 2004; Fedyszak-Radziejowska 2005; Szafranec 2012), transformations in traditionally understood social roles (Michalska 2012, 2013), and changes occurring in the countryside after Poland's accession to the European Union (Drygas, Rosner 2008; Wilkin 2014).

The aim of this publication is to look at the problems of Polish rural areas from the perspective of the young generation of researchers, to show what problems they are interested in and what study methods and techniques they use to describe the phenomena occurring in Polish villages, as well as to analyse the results of their studies and underscore their importance for the development of knowledge concerning the dynamic transformations in Polish rural areas.

With this end in view, we established cooperation with representatives of different fields of study (sociology, ethnography, economy and geography) from renowned academic centres such as Institute of Rural and Agricultural Development, Polish Academy of Sciences (IRWiR PAN) in Warsaw, University of Lodz,

Life Science University of Poznan, Technical University in Warsaw, Institute of Urban Development in Krakow, and Maria Grzegorzewska University. What they have in common is interest in the problems of rural areas and their residents.

The authors of the discussed texts concentrate on various problems. First, they focus on the new model of rural development, very often identified with concepts such as multifunctional and sustainable development, assuming active participation of rural residents in solving the problems which affect them. These issues are discussed in articles by Ruta Śpiewak, Pamela Jeziorska-Biel and Katarzyna Zajda. Kinga Pawłowska describes the strategies of coping with the reality used by residents of marginalized villages, which make it easier and at the same time more difficult for them to adapt to the new model of rural development.

Ruta Śpiewak analyzes the lively discussion on the model of rural areas and farming development, from the 1980's and 1990's and confronts it with the new model. The goal of her article is to present the approach to the analysis of rural inhabitants' attitudes towards the new model of rural development in Europe, a model that frequently appears in the scientific and political discourse. She stresses that the agricultural policy of the European Community led to negative social, economic and ecological effects. The dominating agricultural development model of that time was named an agro-industrial model, and the development concepts were based on the fact that rural development began at a farming homestead and on the farmland and that it ended there as well: that this process was secondary to farming development. She notices that: "The new model, as opposed to the diminishing farming modernisation paradigm, assumes very active participation of rural area inhabitants in the implementation of the development programme. Rural areas may not change without the involvement of their inhabitants, and they ought not only to be aware of the course of changes but also to be willing and able to participate in the transformation". Her research was conducted in 2010, in the area of the Local Action Group "Kraina Rawki" partnership, a local structure that emerged in 2006 for the implementation of the LEADER programme, the exemplary method of implementing the new rural development programme. The partnership was populated by 35 thousand people and encompassed 6 communes. Locating the field research in this structure allowed to utilize a variety of local resources, such as local activity group strategic documentation, documents of the communes being part of the partnership, websites, the results of a questionnaire conducted by the board of the local activity group, research conducted as part of the ALDETEC programme, or analysis of the financial and merit reports from the programme's activity. The data were collected through unstructured interviews with the local leaders and questionnaire interviews with a sample of 200 people. The main conclusion from the analyses is that the new rural model is accepted only in fragments and that rural inhabitants from Local Action Group "Kraina Rawki" are not yet ready to face the requirements of the new rural areas development.

Pamela Jeziorska-Biel focuses on the implementation of “Village Renewal Programme” in one of the Polish voivodeships – Lodz Voivodeship. She presents the results of research carried out in the period: 2013 – 2014 which goal was to answer the following questions: 1) What are the characteristics of the Rural Renewal Programme, implemented in the municipalities of the Lodz region in the context of sustainable development? 2) What are the functions served for sustainable development by Rural Renewal programmes of these areas and which components are strengthened (social, economic or environmental)? In the first part of the article she analyzes the development of the Rural Renewal Programme in Europe (taking into consideration the assumptions of the sustainable development). In the second she discusses the implementation of the programme in Lodz Voivodeship (which is quite specific because of its inhabitants’ low level of social capital). She stresses that “the Rural Renewal Programme in the scale of the entire region of Lodz (during years 2004–2006) was aimed mainly at the social sphere, less on the economic (only 5 projects related to renewal of the technical infrastructure and spatial), and the least – natural (only three projects related to health strict environmental values municipality)”. In her opinion the most important in this programme were: the integration of the communities, their activation by creating a forum for the exchange of experiences, recreational space for the children and adolescents. In the conclusion she asks whether the Village Renewal Programme contributes to the sustainable development of rural areas or just specific parts of it and notices that “In the light of the results presented it should be stated that in the municipalities of the Lodz region Rural Renewal supported only one area of development”.

Katarzyna Zajda focuses on the social innovations in Polish rural communities define as the development and implementation of new ideas (products, services and models) to meet social needs and create new social relationships or collaborations. She stresses that extensive literature concerning innovations has been dominated by economic perspectives and discourse concerning relations between innovations and economic growth and that social innovations are not commonly identified among other kinds of innovations as those that are neither directly associated with the market nor require considerable financial expenditure. The aim of her article is to present the determinants of social innovations in the context of characteristics of Polish rural areas, with particular emphasis on the social capital of their inhabitants. She analyzes selected characteristics of rural residents’ social capital (their level of social trust, readiness to work voluntarily for their own environment, willingness to support strangers, level of social activity etc.) and the mechanisms of stimulating social innovations in rural areas. Taking into consideration methods of activating citizens to participate in the creation and implementation of social innovations, presented by Davies, Simon, Patrick and Norman, she is of the opinion that the weakness of some of them is the short time when community members can cooperate. She presents the assumptions of LEADER

method as the one of the methods of generating innovations aimed at changing the relations between the three sectors of key importance for rural development and analyzes the results of the research project: “Structure and determinants of the social capital of local action groups”. Her conclusion is that not all rural areas have a possibility to implement social innovations due to at least three determinants: social perception of innovations as a process reserved for companies with considerable financial capital, little human capital resources connected among others with education or creativity, and a low level of social capital.

The text by Kinga Pawłowska is devoted to the post-transformation traumas of Poles living in rural areas. But contrary to the traditional narrative forms, referring to the categories of exclusion and marginalization when describing the consequences of the systemic transformation, Pawłowska strives to perceive the reality of rural area inhabitants from the perspective inspired by Michel de Certeau’s work, referring to the ideas of “strategies and tactics” and to the concept of new cultural history. She tries to reconstruct “the ‘tactics’ of some inhabitants of the contemporary Polish villages, which are all kinds of ways of ‘coping’ in the system that the inhabitants apply. Also, they are the ones that are expected by the power-holding ‘strategists’”. She underlines that a relatively broad spectrum of the choices made by the villagers can be observed – those in line with the ‘system thinking’ as well as those that oppose it. The material used in the article was gathered by Pawłowska herself in two villages in Mazovia region in Poland. Analyzing the behavior strategies of inhabitants of two selected communes, the Author notices that they try to cope with the changing reality in various ways. According to Pawłowska, their tactics come down to three basic ways of action, which she describes taking into consideration the differences in ages and life situations of the respondents.

Sylvia Michalska and Ilona Matysiak focus on the subject of transformations in rural residents’ social roles, including rural women serving public roles.

Sylvia Michalska raises the question of how social roles of women living in Polish rural areas have been changing over the last nearly a hundred years. She concentrates on three most important spheres of functioning of rural women: family, professional and social roles, asking what allows these women to broaden the repertoire of roles and go beyond traditional patterns, and what makes these changes more difficult. On the basis of the analysis of literature, diaries written by rural women over the last century, as well as the results of studies devoted to the ways of allocating chores in Polish families, women’s professional and social activities, their involvement in politics and activity in serving public functions, she attempts to reconstruct the changes occurring in the activity of women living in the country. She observes that in Poland the perception of female roles is changing, which is particularly visible in rural areas, as there more traditional divisions of roles connected with sexes have been preserved. The possibility of taking advantage of changes is, however, sometimes limited by internal factors resulting

from mentality, as well as external ones, related to the environment in which the changes occur. The combination of traditional expectations of women and their desire to face new challenges leads to heavily loading female rural residents with duties, and as a result they are not always able to achieve the goals they have set for themselves.

Iłona Matysiak is interested in the factors determining the growing participation of women as village representatives in Poland. Taking into account the assumptions of political elites recruitment (that taking up public functions is determined both by factors directly connected with the individuals themselves and by the characteristics of political structures and roles), she analyzes the socio-demographic characteristics of village representatives, their motivations, and the social perception of the role of village representative. She also points out regional differences between the number of women and men serving that role. Her analyses are based on a qualitative empirical study that covered ten communes located in different regions of Poland (the communes were chosen because of their different proportions of women serving as village representatives and commune councillors). The interviewees were 51 male and female village representatives and 57 persons from local authorities, public institutions and organizations. In the article she presents the function of village representative and rural women's participation in subcommunal self-government and stresses that "The institution of village representative (*sołtys*) has a long and well-established tradition in Poland". She also characterizes rural women's participation in subcommunal self-government and theories of political elite recruitment. Her analyses show that the share of females in the group of village representatives is determined by historical factors, regional varieties in the continua of local communities and "long-time settlement" of their members, attitudes to female and male social roles (including positive evaluation of women serving public roles, especially the traditionally "male" ones).

In the third part of this monograph, we present texts by authors interested in the issue of multifunctional development of rural areas, with particular consideration of development of rural entrepreneurship (dealt with by Magdalena Dej and Adam Czarnecki).

Magdalena Dej describes companies relocation to rural areas in large metropolitan regions in Poland. The purpose of her article is to determine the scale and key characteristics of plant relocation in major metropolitan areas in Poland with particular emphasis on fringe areas of metropolitan areas – especially rural communities (major metropolitan areas in Poland include very large areas still considered to be rural). In her opinion an analysis of the characteristics of attractive rural townships makes it possible to evaluate local resources and their attractiveness to potential investors. Her research shows that the number of companies in fringe areas of major metropolitan regions is on the rise in Poland [...] This is especially true of rural areas located in close proximity to major urban centers and that more

than half the companies in some townships are non-local companies. One of her main conclusion from the research is that “Company relocation is traditionally not a spontaneous process, which tends to involve well-thought out decisions regarding plant site selection”. What makes some townships more attractive than others is special economic zones (which offer tax breaks, tax free periods, and technical infrastructure), business activity zones and tax breaks to potential investors. The very important are also lower real estate prices in suburban areas represent a pull factor, as does investment land availability, good road access, and good transportation links with the urban core as well as other places important to business enterprises, the investment climate in each given township, which include national tax law, local economic considerations, local technical infrastructure, as well as institutional support.

The goal of Adam Czarnecki’s paper is to assess the significance of small towns as sales and supply markets for rural businesses. He describes a qualitative study realised in Poland, merely of the existing economic linkages established by rural enterprises (excluding farms) and their counterparts as well as public institutions, farms and individual consumers from small towns. In his opinion: “the role of small towns as a development facilitator for rural areas has been under constant change [...] small towns are influenced by globalisation, outsourcing of service and manufacturing jobs to low-wage countries, industrialisation of agriculture, large-scale economic and functional changes, increasing social inequalities, service restructuring and negative demographic tendencies”. Author remarks, that many small towns have successfully adapted to the ongoing socio-economic transformations, whereas others are in crisis. In his opinion one of the effects of globalisation has been to shorten the supply chain by reducing the distance and time between its successive links: rural producer – processor – distributor – final consumer. The effect of these changes has been the loss of small towns’ traditional basic functions in servicing the surrounding countryside, and consequently, a decline in the significance of small (local) urban centres as supply, sales and cooperation markets for rural farms and enterprises. The role of a small town as a “transmitter” between main urban nodes and (more peripheral) rural areas has been reduced in terms of social functions, given that globalisation and technological progress have facilitated flows of information, ideas, innovations, behaviour and consumption patterns, and opened new job opportunities or, more generally, influenced people’s lifestyles. In this way, the significance of small urban centres has been increasingly marginalised and they are no longer “meeting places” of the rural and urban society/economy. Czarnecki notices that it is worth to support the functional diversification of a small town in the more advanced/specialised services sector, cause when small urban centres could continue to play an important role for surrounding countryside it could prevent the brain drain of the most valuable human resources, who contribute considerably to the human and intellectual capital of rural communities.

The last article written by Jakub Hadyński deals with the issue of regional competitiveness of rural areas. He stresses that the competitiveness of rural areas is a growing area of scientists' interest. It also attracts more and more attention of the development policy, which relates to the effects of socio-economic and political changes. The main aim of his study is to identify the competitive rural areas at the NUTS 2 level of EU regions based on rural characteristics as well as on the Regional Index of Competitiveness, designated by DG Joint Research Center together with DG Regional and Urban Policy. Moreover, other development indexes were also used to indicate the level of regional competitiveness: EUROSTAT statistical data, covering the 2007–2013 period, along with the American Harvard Business School studies of rural areas competitiveness. The results of his research pointed out great diversification of regional competitiveness and presented the spatial location of territorial units within the EU. Peripheral rural areas located in the eastern and western parts of the EU are the least competitive. They are characterised by low GDP levels that result in the polarization of EU territorial dimensions.

We hope this publication will be interesting for the Readers, introduce them to selected problems of development of Polish rural areas and contribute to cooperation with the Authors of the presented texts.

Katarzyna Zajda i Sylwia Michalska

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Ruta Śpiewak, PhD

Institute of Rural and Agricultural Development
Polish Academy of Sciences

RURAL AREA INHABITANTS IN THE CONTEXT OF THE NEW MODEL OF RURAL AREA DEVELOPMENT

Introduction

The border of the 1980s and 1990 brought a lively discussion on the model rural area and farming development. The agricultural policy of the then European Community led to negative social, economic, and ecological effects. The dominating agricultural development model of the time was named an agro-industrial model and the development concepts were based on the fact that rural development began at a farming homestead and on the farmland and that it ended there as well, that it was a secondary process to farming development.

As a result of the growing crisis, appears a new model of rural development, which seeks to prevent damage caused by the impact of the current model (Marsden, Banks et al. 2001; Cloke 2006). The new model, as opposed to the diminishing farming modernisation paradigm assumes very active participation of rural area inhabitants in the delivery of the development programme. Rural areas may not change without the involvement of its inhabitants, and they ought not only to be aware of the course of changes but also be willing and able to participate in the transformation. Attitude of the inhabitants of rural areas is therefore important – both that of farmers and people making their living outside of farming activities. Much research points to the fact that rural area inhabitants are used to the old model of the countryside's activity and the preferred model of farming development is the productivity approach, deriving from the modernisation paradigm. There is real danger of rural area inhabitants not becoming actors of the development of their living places, since the new model of rural activity puts much more emphasis on rank-and-file development, cooperation networks, initiative of individual people, and trust. Development, including the economical aspect thereof, is described in sustainability terms (Adamski, Gorlach 2007) and not only – as it has been so far described – in growth terms.

The model entails a shift in the place occupied by farming in the definition of countryside and the economics thereof. Additionally, and this is an important shift from the viewpoint of the natural environment, domination over the nature and fighting barriers that it sets is converted into partnership, respect of nature and using its resources with care.

The goal of this article is to present the approach to the analysis of the attitudes of rural area inhabitants towards the new model of rural area development in Europe, a model that frequently appears in scientific discourse as well as political one. The methodological considerations in this article as well as research conclusions have been described in greater detail in a doctoral dissertation *Rural area inhabitants and the new model of rural area development*¹.

For the purpose of this paper, Turowski's definition of attitudes was adopted, taking into account three components of attitudes: cognitive, emotional-evaluational and behavioural (Turowski 2001). The goal of this paper is therefore to research the attitudes in three dimensions: cognitive – how much people know about the ongoing debate, emotional – whether they like the model, what they think about its characteristics, and behavioural – whether they participate in the implementation of the said model.

Based on the analysis of the research material and scientific literature, (cf. Perepeczko and Majewski 2004; Halamska 2013; Czapiński 2014), it was assumed that social, intellectual, and psychological faculty of Polish rural area inhabitants are insufficient to implement the changes related to the new model of rural area development. This is a demanding model, requiring deeper involvement, activity and independence of rural area inhabitants than with the previously functional approach. This model assumes utilising the endogenic resources of rural communities, activation of the local population, and creating various forms of cooperation networks. The research conducted so far indicates that rural area inhabitants are primarily not aware of the changes that are necessary in the implementation of the new approach to rural area development, and secondarily that they show only limited interest in these developments. The structure of the perceived needs as seen by rural population is additionally different from that developed externally. Therefore, a hypothesis has been put forward that there is a discrepancy between the “external” new model of rural area development and the desired “ideal type” of the said development, present in the collective mind of countryside inhabitants. An additional assumption was that there is a spectrum of attitudes among the rural population, so it was assumed that the differentiating factors would be: age, education, and whether the person worked in farming or not.

¹ An unpublished doctoral thesis under the supervision of Maria Halamska. The thesis can be found in the main library of the University of Lodz.

In order to reach the fundamental goal of the research, which was to answer the question on what the attitudes of the rural area inhabitants towards the changing model of rural area development are, a number of specific goals have been set. The first one was model reconstruction (regarding the ideological model) based on a number of source materials. The next goal was to show the deformations of the ideological model in its operationalism phase, i.e. converting it to a EU-scale activity programme (European Agricultural Fund for Rural Development, EAFRD) and afterwards the 2007–2013 Polish one (Program Rozwoju Obszarów Wiejskich, Rural Area Development Programme, PROW) as well as local PROW activities; in this case the area where the qualitative research was conducted was the Lodz Voivodeship.

The first part of the article presents the rural area development model called the ideological model, based on Polish and international scientific publications, social and political institution expert papers. When compiling this complex model, its basic components were put into focus: social, economic and environmental dimensions, model axiology i.e. values that the model refers to, and the assumed method of creating the new reality. Further, the paper operationalises the model from its European to the local level. The fundamentals for this process are current strategic and financial documents, European and national laws and financial guidelines that regulate the methods of spending the financial means, all of which are practical responses to theoretical model assumptions and the ideological postulates contained therein. Referring to the information on the scope of the EAFRD, the 2007–2013 Polish PROW programme allows to trace the evolution of the ideological model and its deformations at the individual stages of implementation, forming the rural area development policy. The final part of the paper presents the results of a monographic study conducted in a selected area of one of the Local Action Groups in the Lodz Voivodeship (central Poland).

New model of rural area development

Ideological model

The new model of rural area development is a set of ideas which outline the shape of rural policy (policy of rural area development) in the European Union. The description of the new model of countryside development contains the following elements:

- Postulated characteristics of the future shape of the rural areas (its new social reality), created through actions undertaken at different levels and by different actors. These are economy, society, and environment.

- Values that the proposed model refers to/is based on, both in shaping the rural landscape as the social reality anew and in the selection of ways to create it.
- Preferred rules of creating the abovementioned new reality.

Describing the changes in the rural economy, one of the key concepts in the discourse on modernity needs to be brought into focus – dynamism (cf. Giddens 2001). Freshwater describes a dynamic process of adapting to changes in a way that keeps the rural society unaltered (Freshwater 2003). Because of the said dynamic character, the future of rural areas is impossible to predict. Marini and Mooney stress that rural areas constantly reconstruct their social, economic, and cultural structures (Marini and Mooney 2006). New development, also in its economic dimension, is currently described in sustainability criteria instead of growth criteria, as it used to be. Creating one coherent vision of rural area development is difficult and is reason for the need to find a way to reconcile a number of conflicting factors that influence this development. Some of them are mutually exclusive: postulated economic liberalism meets the postulate of social involvement, environmental sustainability with limitations of regulations. Many more such oppositions can be enumerated. An answer to the question of the role and place of farming in rural economy also needs to be given and there is certainly no one good answer to such a question. European rural areas are deeply diversified both in its economic and social aspects. As a result of this, when creating the new model different needs and visions must be taken into account. One of the most important changes is that rural areas and farming are not the same, and farming does not only stand for food production. The inhabitants of rural areas differ, as well as their sources of income specialise and diversify. Many inhabitants of rural areas do not have anything to do with farming.

The model entails a valid change to the approach towards nature: from the domination over the environment and treating it as a fixed element to partnership towards nature and deeper respect thereof. Caring for the environment becomes so important that rural area inhabitants that take it upon themselves and provide public goods through their attitude are rewarded.

The values shaping the new model are frequently different from those that used to be considered the rural norm until recently. In a sense, the scale of values contradicts a lot of character traits of rural area inhabitants that have been living there for generations. On the other hand, the vital values of the ongoing debate are tradition, multifunctionality, and locality – in other words, values that used to be core ones for the “old” rural areas, however, in a different shape.

Because of the high number of the elements for the postulated rural reality, an attempt was made to collect and organise them in a table (see Table 1).

Table 1. Postulated characteristics of the rural areas

Postulated characteristics of the rural areas – new social reality		Values the model refers to	Preferred methods of creating the new reality
Economy	Society	Environment	
<p>Farming serves market and non-market functions</p> <p>Development of multi-functional society</p> <p>Economy diversification based on the sustainability idea</p> <p>Development of different high-quality services</p> <p>Production of high-quality food products, creating short food chains</p>	<p>Limiting of farmer count</p> <p>Development of multi-functionality</p> <p>Resultant heterogeneity in rural community</p> <p>Process of suburbanisation of the countryside</p>	<p>Relation between farming and climate causes farming as the food production sector unable to only utilise the resources of the ecosystems, but requires that farming reproduces these in a constant manner</p> <p>UE ecological policy is based on constant and sustainable growth</p> <p>Biodiversity needs to be maintained</p> <p>Rural landscape quality needs to be maintained</p> <p>Air, soil and water pollution needs to be limited</p>	<p>Decentralization</p> <p>Focus shift from sector policy to territorial policy</p> <p>Shift from governing to co-governing</p> <p>Major role of local actors (leaders) and collective organisations (formal and informal)</p>

Source: own research.

Policy transfer

In order to trace the direction of rural area development, designated by the abovementioned new ideological model, a decision was made to reconstruct rural development model based on strategic and financial documents. Legal acts and financial documents largely define the activity of EU member state rural areas. It is justified to take a thesis that money and the way it is spent are a practical answer to theoretical assumptions and ideological postulates. Referring to the information about the delivery of rural area development programmes (operational data) it will be possible to say with large certainty how much the implemented rural area development programmes are in accordance with the ideological model, what discrepancies are present in the developments, and on what implementation levels these are present, so that rural area inhabitants may be reached and their interests of individual activities which correspond to the individual goals of the model.

The new model of rural area development is a set of ideas which mark the development of rural policy (rural area development) in the EU. From the European Commission, the ideas are transferred to individual countries and through the different levels of member state organisations (depending on the degree of the given country's decentralisation) reach the local stakeholders. The transfer mechanism can be described through the policy transfer concept, shown in Figure 1.

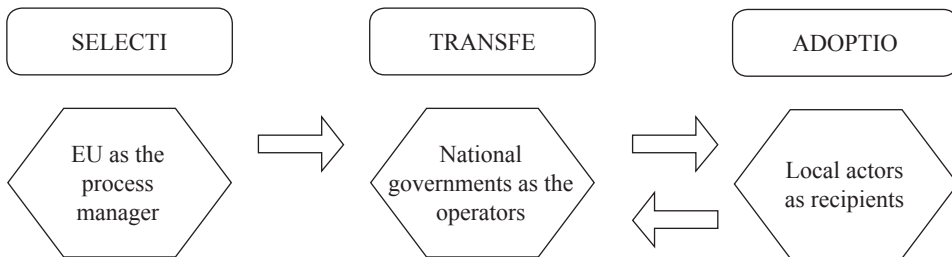


Figure 1. Policy transfer cycle

Source: own proposition, based on Chevalier and Maurel 2010

The ideological model of rural area development on a EU scale was operationalised in the so-called second pillar of EAFRD agricultural policy. Deformations of the ideological model while it was being transformed into the EAFRD activity programme were shown, and subsequent alterations that took place when the Polish 2007–2013 Rural Area Development Programme was adopted, together with local activity, in Lodz Voivodeship, were also presented. The ideological model allowed to assume that the three interference areas – economy, society and environment – are equal. In the EAFRD programme the interference areas have

been distributed over four axes-goals: (1) improvement of farming and forestry competitiveness through support for restructuring, development, and innovation; (2) improvement of the natural environment and rural areas through support of farming; (3) improvement of rural area living standards and support for differentiation of economic activity; (4) LEADER programme.

Table 2. Spendings on the individual axes and developmental goals in the EU and Poland. Percentage (%) data at the end of 2013²

	Axis 1	Axis 2	Axis 3	Axis 4
EU27	32	45	13	6.0
Poland	43	29	19	4.5

Source: author's own calculations based on the 2013 collective report, <http://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=SWD:2014:340:FIN&qid=1416820489100>

The data for EU is an averaged sum from all member states. Poland spends more than the European average on the improvement of farming and forestry competitiveness as well as on issues related to living standards in rural areas and differentiating of rural economy. On the other hand, less than the European average is spent on natural environment and support of social capital. One needs to take into account, however, that the structure of European rural areas is diversified and such a division, according to Rowiński, in reference to Poland reflects the requirements of Polish food economics (Rowiński 2008). However, confronting these comparisons to the model, in case of Poland a preference can be observed for actions related to farming and other areas of economy. Environmental issues and social capital ones, which are linked to the relevant values, are moved into the background. It is understandable to a certain degree and is a consequence of economic factors, insufficient job count, infrastructural shortages, etc.

It would be a mistake to assume that all the above mentioned activities have a developmental character. Only a part of them can be treated as developmental, improving upon certain aspects of the overall situation of the rural areas and their inhabitants; part of these (in 2014 – 27% of all the 2007–2013 farming developmental programme – PROW³) conserves the current structure of the rural areas and can be treated as social transfer (cf. Zawalińska 2009; Rowiński 2010), not serving the change.

² The values do not add up to 100 because there is no position for technical support.

³ Here, Rowiński enumerates: support of activity in mountainous areas and other areas of unfavourable type, structural benefits, supplements of area payments.

In order to facilitate the distinction between change-influencing factors and those that do not impact the development, it is worth to see the division as suggested by Rowiński (Rowiński 2008, 2010).

Table 3. Distribution of PROW funds to individual purposes. Allocation in %

Support funds allocation	2008	2014
Development of food economy	29.0	32
Other economic areas	16.5	16
Environment protection	18.0	15
Social-type income	26.0	27
Others (here, the author qualified different other activities that may be called supportive of the development of social capital, and technical assistance	8.0	8

Source: author's own calculations based on Rowiński 2010 and 2007–2013 PROW, 2011 version (2014).

This table allows to draw a conclusion that the Polish model is designed to primarily improve on the quality of the financial situation of rural area inhabitants, less often through economic solutions than through simple financial transfers. This also results in increased availability of funds for activities related to the development of food economics and competitiveness of farming and forestry, while pro-environmental issues suffer. Second place was occupied by activities related to social issues. Support for food economy currently consumes about 15% more funds than other economic sectors. Activities supporting social capital development and other “soft” capital types consume 22% less than farming funds⁴. In the referenced model, the possibility of co-acting and trust are considered two of the most important development factors. J. Czapiński points at social capital to be the most crucial factor for the development of whole countries, including their rural areas (2011). Moving so large funds to activities that Rowiński considers merely supportive for social income informs us that in Poland the conservative model is selected more willingly than supportive of changes.

The last level of the transfer cycle is the local level (cf. Figure 1). According to the accepted model of policy transfer, differences in spending will show how the model in adoption stage differs from the stage of transfer. Until the 30th of

⁴ It is worth noting that the so-called soft activities may also be funded through other sources, such as the Human Capital operational programme.

November 2014 in Poland, from the 2007–2013 Rural Area Development Programme, 2504,7 PLN per hectare of farmland was issued and at the same time 2256,6 PLN per hectare of farmland was spent in Lodz Voivodeship. The following Table 4, shows the differences between expenses, in the mentioned above programme, in Poland general and in Lodz Voivodeship.

Table 4. The status of implementation of operations into three categories, the data for the whole Polish and Lodz region at 30 November 2014
– the percentage of the total amount issued in Polish zlotych⁵

Action	Measure/axis	Issued payments in Poland	Issued payments in Lodz Voivodeship
1	2	3	4
ECONOMY	Vocational training for persons employed in agriculture and forestry (I)	0.3	0.2
	Setting up of young farmers (I)	4.3	5.3
	Advisory services for farmers and forest owners (I)	0.3	0.1
	Modernisation of agricultural holdings (I)	21.4	26.0
	Increasing the added value to basic agricultural and forestry production (I)	6.2	7.4
	Improvement and development of infrastructure related to the development and adjustment of agriculture and forestry (I)	2.9	0.4
	Participation of farmers in food quality schemes (I)	0.09	0.04
	Agricultural producer groups (I)	1.4	0.5
	Basic services for the economy and rural population (III)	9.3	9.3
	Establishment and development of micro-enterprises (III)	4.4	2.8
	Diversification into non-agricultural activities (III)	3.1	2.8
	Total in %		54.1

⁵ There is no position for technical support, information and publicity.

Table 4 (cont.)

1	2	3	4
SOCIETY	Early retirement (I)	4.1	5.4
	Implementation of Local Development Strategies (IV)	1.6	0.9
	Village renewal and development (III)	3.8	3.8
	Implementation of Local Development Strategies (IV)	1.0	0.8
	Implementation of cooperation projects (IV)	0.06	0.06
	Support of management in mountain areas and in less-favoured areas (II)	25.3	28.4
	Total in %	35.6	39.5
ENVIRONMENT	Agri-environmental programme (II)	6.7	3.2
	Afforestation of agricultural and non-agricultural land (II)	1.3	1.0
	Restoring forestry production potential damaged by natural disasters and introducing appropriate prevention instruments (II)	0.4	0.6
	Afforestation of agricultural and non-agricultural land (II)	1.6	0.2
	Total in %	10.2	5.1
Total amount		38909331172 PLN = 9490080773,65 EUR	2642500532 PLN = 644512324,87 EUR

Source: author's own calculations based on reports of The Agency for Restructuring and Modernisation of Agriculture 2014⁶.

Comparing the expenditure (internal dynamic) of the *2007–2013 Rural Area Development Programme* in Poland and in the and Lodz Voivodeship we can see the differences between the environmental and social activities. 4% more payments in the social area were issued in the Lodz Voivodeship compared to the Polish average and 5% less on the environment issues than in Poland

⁶ <http://www.arimr.gov.pl/pomoc-unijna/wdrazane-programy-i-dzialania-dane-liczbowe/program-rozwoju-obszarow-wiejskich-2007-2013.html> [date of access 23.03.2015].

general. In the area of economy the difference is only 1%. In 2010 the differences were more visible. Between 2010 and 2014 the vastly differences decreased. However we have data from 2010 regarding only contracted amount. We can point that in 2010 it was as following: in Lodz Voivodeship were contracted 18% more in the social area than Polish average, 11% less on the environment issues and 7% less in the economy area. It means that the new model accepted by the inhabitants of Lodz Voivodeship is changing and is getting more similar to Polish average.

Local inhabitants attitudes

In order to be able to verify the hypothesis that there is a discrepancy between the “external” new model of rural area development and the desired “ideal model” existing in the minds of the local community, research was performed.

The most adequate method seemed to be case study because one of the key elements of the new European model of rural area development is the local context. Monographic approach was the most suitable for this specifics, so much more that it allows the use of a variety of research techniques.

The 2010 research was conducted in the area of the Local Action Group “Kraina Rawki” partnership, a local structure that emerged in 2006 for the delivery of the LEADER programme, the exemplary method of the new rural area development programme implementation. The partnership is populated by 35 thousand people and encompasses 6 gminas. Locating the field research in this structure allowed to utilise a variety of local resources, such as local activity group strategic documentation, documents of the gminas forming part of the partnership, websites, results of a questionnaire conducted by the board of the local activity group, research conducted as part of the ALDETEC programme, or analysis of the financial and merit reports from the programme’s activity. The sources for further processing have been collected through:

- unstructured interviews with the local leaders (unstructured scenario). The sample was defined as a result of the “snowball effect”. 16 such interviews have been conducted with each interview scenario having 27 issues;
- questionnaire interviews with a sample of 200 people selected through layer-and-quota sampling. The questionnaire for this type of research consisted of 42 closed or half-open ended questions and 16 metrics.

In the part of this paper devoted to the attitudes of the given area’s inhabitants, the participants’ relation to the new model of rural area development and the conditioning thereof was assessed. In order to present the indicators of attitudes in a synthetic way, indices have been constructed, making use of all the responses in the questionnaires of having a logical connection with the issue. The index which

was a result of summarising all the results of the reference values encompassed all the key criteria. The following indexes have been created:

- index of knowledge of the new model assumptions (1);
- index of sharing “new rural area” values (2);
- index of EU-style thinking (3);
- index of living activity-passivity (4).

The indexes present in a synthetic, however also simplified way the attitudes of rural area inhabitants towards the new model of rural area development and the expected effects of this development. It is a sort of a SWOT analysis of the attitudes that allows to show social support for the new model and social weaknesses that are threats to its successful implementation. Rural area inhabitants are quite knowledgeable about the assumptions of the new model of rural development; an average research participant scored 60% of the points in this area. There is weaker approval for the values that drive the project and that emerge as the result of its implementation, with the average participant scoring 45% in the relevant questions – this translates to more than half of the values not finding support among the researched group. Real threats to the successful implementation of the model are visible in two following indexes: EU-oriented thinking and living activity, where average scores were 33% and 19%, respectively. If the implementation of the new model meets with any difficulties, this will not be the result of lack of its knowledge or its axiology, but because of lack of EU-orientation in attitudes and passive lifestyle of the majority of rural area inhabitants.

These problems are illustrated in the Figure 2, showing the distribution curves of the four constructed indexes.

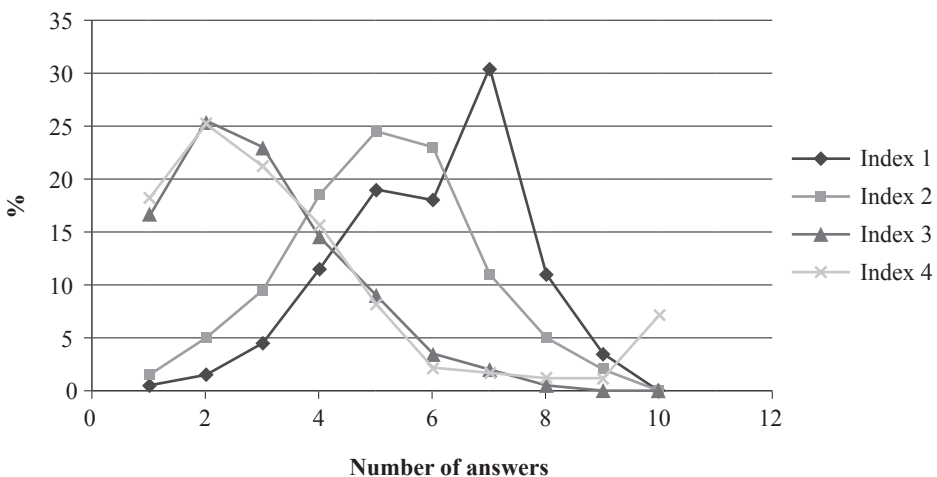


Figure 2. Distribution of index values

Source: own research

The information aggregated above shapes the model of rural area development desired by its inhabitants. Discrepancies between the two models (as suggested by the inhabitants and the ideological one) are especially visible in social elements and the tools for implementing the changes. There is visible fear of decentralisation, shifting the responsibility for the development into the local level, reluctance to cooperate on citizen rules, and limited trust. As defined by the inhabitants, contrary to the ideological model, there is emphasis on individualism combined with lack of independence and expecting external support.

The above summary allows to conclude that the hypothesis of serious discrepancies between the ideological model and the expectations of rural area inhabitants has been confirmed. The research allowed not only to show existing discrepancies but also their scale. The new rural model is accepted only in its fragments and a question emerges on whether the elements that are chosen to be accepted by rural area inhabitants may result in deeper changes so that the rural areas become “a good place to live”. The main hypothesis of the research states that social, intellectual and psychological faculty of rural area inhabitants is insufficient for the introduction of the changes contained in the new model of rural area development. Not only knowledge, but also accepting certain new values as reinterpretation of the old ones will allow for a real change and conscious adaptation to the new expectations and requirements. The inhabitants of the researched area, although knowledgeable in the general trends, see that change is necessary and even see the direction thereof, but it seems that on the behavioural-emotional level they are (still?) not ready to embrace the change. They support more surface-level changes than those contained in the model. Discrepancies can also be observed on the axiology level. When readiness for undertaking various activities resulting in the improvement of their living standards was put under observation, both on the declared and the actual level, it was revealed that the population is more willing to accept a passive strategy of expecting external support than to show willingness to actively improve not only their living standards but also those of the local community. Thus, the hypothesis of low interest levels in change and of limited readiness to embrace the activity required by the model has been verified.

The social structure of rural areas is more and more diversified and so are attitudes towards change and development, which is reflected in the following hypothesis. It refers to a differentiating impact of personal characteristics, such as age, education, activity level, and social-economic status, on the attitude towards the new rural development model. Age is of low impact, but education influences the attitude in a more profound way. Those who had at least a post-matura certificate show a visibly more open attitude than those who finished their education at an earlier level, however, the discrepancies here are not so drastic. The largest impact was observed in relations to whether the basic source of income of the research participants was farming or not. Among farmers there is a clear

passive attitude. Those whose income is derived from working the land are not prepared to introduce changes in the activity of their farmsteads and, what is more important, to change their perception of the country and their personal role in the creation of local economy. Farmers are not able to consider the categories of public good. As a rule, they also do not support decentralisation, or locating the national agencies closer to the actors. The hypothesis of differentiating impact of personal characteristics is partly confirmed when considering age and education and more seriously in reference to the social-economic status of a farmer. The strongest readiness to change, knowledge and understanding thereof are visible among social and political elites. Only certain rural social groups are partners in the discussion of changes and ways of implementing thereof. It may therefore be concluded that there becomes stratification and uneven distribution of pro-developmental tools. Only a small, closed group participates in the debate on changes and attempts activities that are in accordance with the axiology of the new model with the use of new tools.

The paper characterises attitudes towards the new model of rural area development as shown by inhabitants of a single area. The area chosen for the research was that of a local Action Group (Dolina Rawki) from the Lodz Voivodeship. This community is not representative of Poland, but it was selected for merit reasons as well as practical ones. However, even when considering this one community, directions and mechanisms of change were made visible that were contained in the rural area development as well as attitudes of the inhabitants towards it. It was shown that the main obstacle in implementing the ideas of the new approach in the area is low social capital, ingrained patterns of thinking, and treating farming as the basic source of income. Knowing the potential and meaning of the above-mentioned factors, it is justified to state that these limitations will play a major role throughout the country.

Conclusions and closing remarks

The conducted research indicates that rural area inhabitants are not yet ready to face the requirements of the new rural area development model. The problem, however, may also be reversed and consider the new model, developed in different social conditions and being a consequence of different rural growth dynamics, not to take into account the possibilities and expectations of inhabitants of Polish rural areas. In the light of the data on the influence of social capital on the social and economic development (in whole societies, not only their rural parts) and very low levels of these factors in the countryside it seems that the development of the individual social capital components of need to be skilfully supported from the outside. However, the development or change needs to progress with the parti-

icipation and consent of these who it will affect. In creating the vision of the rural areas and the delivery thereof, rural area inhabitants need to be active, with as high number of the local people activated as possible. Introducing changes, especially those that require the change of attitudes and ways of thinking requires not only resources but also time.

Some elements are also worth noticing, which might become grounds for future research. Perhaps the reconstruction of the models of rural area development policies, both in Poland and on the EU level, performed on the basis of scientific and political discourse, will allow for understanding the shaping process of the said models and what their convergent and divergent elements are. Using the concept of policy transfers in the analysis of rural area development policy shapes, introduced at the national and regional scale, may become a useful method in the evaluation of the rural area development programmes and comparisons in time and across regions.

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Pamela Jeziorska-Biel, PhD

Department of Rural and Urban Sociology
University of Lodz

**THE “RURAL RENEWAL” PROGRAMME
AS A MECHANISM OF PROMOTING SUSTAINABLE
DEVELOPMENT OF MUNICIPALITIES IN POLAND.
AN EXAMPLE OF THE LODZ VOIVODESHIP**

Introduction

The diversity of rural areas is determined by many factors, including geographical location, the level of economic development, employment structure (including the percentage of people employed in low-income farms), capitals available to residents of rural areas (including human and socio-cultural ones).

Depending on the specifics of a given village, the encountered problems may vary. Most of them concern the problem of diversification of the economic structure, i.e. the development of non-agricultural jobs posing chance to reduce the level of unemployment and the problem of low-level activation of its inhabitants, meaning low participation of citizens in setting the vision of rural development and the pursuit to implement it. A variety of activities funded by the European Union help to alleviate these problems.

The guiding idea of all these activities is sustainable development. It is noted that this development is: a) stable in time, with constant dynamics of its course; leading to the protection and replenishment of the resources, b) self-sustaining, based on different fields of activity in rural areas, and c) integrated, interconnecting own resources with obtaining funds for development from outside (see: Pearce et al. 1990; Juroszek 2008: 54). Its characteristic is to strive for balance between the development of social, economic and environmental protection, conservation of natural assets (McMichael 2004; Wieruszewska 1992: 11; Hawkins, Wang 2012). One of the programs which attempts to compensate for the problems of the Polish countryside (taking the principles of sustainable development into account) is the “Rural Renewal”¹.

¹ The term Rural Renewal written in capital letters means the program itself; while written in lower case – the process of renewal as such.

The article outlines the issue the importance the above-mentioned program for the development of sustainable rural communities located in tone of the Polish voivodeship (the Lodzkie Voivodeship). It presents the results of research carried out in the period: 2013–2014. Their goal was to answer the following questions: 1) What are the characteristics of the Rural Renewal Programme, implemented in the municipalities of the Lodzkie Voivodeship in the context of sustainable development? 2) What are the functions served for sustainable development by Rural Renewal programmes of these areas and which components are strengthened (social, economic or environmental)?

The analysis included 131 projects implemented by all rural communities that implemented the programme in the programming period between 2004–2006 and were located in Lodzkie Voivodeship. At that time, Poland received the first tranche of EU funds (within the Sectoral Operational Programme “Restructuring and modernization of agriculture and rural development 2004–2006”) to support the Rural Renewal Programme, and the majority of Polish municipalities joined the programme then, for the first time.

The techniques used in the study were content analysis, free interviews with experts from selected municipalities from the region area – Nowosolna (as the area most active in the activities Rural Renewal). The documents analyzed were provided by the Marshal’s Office in Lodz (i.e. the unit responsible for distributing funds from the Rural Renewal Programme), such as application forms submitted by municipalities, where their objectives were outlined, on which they intended to spend the raised funds. On this basis, the typology of projects was created, by their implementation object. The projects were divided into 6 basic types, the seventh type of projects is the “other”, and the eighth type includes multi-projects, which is about several types of objects.

Ten free interviews were carried out. The selection of respondents was intentional. Among the speakers, there were representatives of local government – the commune head as a person involved in the process of restoration of villages in the municipality; The President of the Municipal Council – as a person who lives in front of one of the completed projects and is personally involved in its functioning; Nowosolna commune office worker – responsible for raising external funds in the Municipality; as well as representatives of the local community – the leaders (six of them) from rural locations where projects have been implemented under Measure 2.3 SOP 2004–2006. Interviews were also conducted with people directly involved in the operation of certain projects (among them the Director of Wiaczyn Dolny Secondary School, the Director of the Centre for Social Welfare in the Municipality).

“Rural Renewal” – the development of the European idea

The cradle of the “Rural Renewal” is Bavaria. In 1976 the name was introduced, although these activities were previously practiced at the local development in rural areas. Combined with the assemblage of land, “Rural Renewal”

was the state policy one way of equalizing opportunities in less developed regions (Próll 1995; Idziak 2004: 26). Due to the system implementation based on the structure of the national government, the Bavarian “Rural Renewal” is defined as a “top-down” (Scheiber 1997). In the similar way such activities were carried out in a different German state, Rhineland-Palatinate (cf. Wilczynski 2000: 20).

With the beginning of the eighties of the twentieth century, the “Rural Renewal” began to spread to more lands of Germany, and in 1981, as it was taken in Lower Austria. The success of the implementation of the “Rural Renewal” in Lower Austria was the result of changes in the procedures for implementation of projects. The attentively and the commitment and contribution to the action of local communities and NGOs started being appreciated. The “bottom-up” initiatives became a unique differentiator of lower Austrian “Rural Renewal”, as opposed to “top-down” process management method, implemented in Bavaria and the Rhineland – Palatinate. The participation and involvement of its citizens in the renewal of their town has been recognized as an important element and distinguishing the implementation of this process.

It should be noted that the Europe Rural Renewal programs are more effective and have greater impact in those regions where their shape, approach and instruments used are an expression of the community self-support for rural development policy, regardless of the financial activities of the EU. However, this applies to those countries, regions and federal states where Rural Renewal programs are widespread in terms of quantity of currently participating villages (municipalities), their complexity (planning, animation community participation, soft and investment projects), support for a wide variety of projects, with a wide range of beneficiaries (public, private and religious entities). In these countries, a high level of investment allows the control of the process of Rural Renewal by the directed flow of resources and thus grants that support to a wide range of selected areas and a number of projects allowing to carry out a comprehensive renewal of the area.

In Poland, “Rural Renewal” was initiated in the 1990s in the Opole Voivodeship (see Map 1). The objective of the programme was to take action related to space adjustment in terms of technical and social infrastructure, landscaping, architecture and services and the execution of projects raising the standard of living (Wilczynski 2000). The intended result of this kind of actions was the enhancement of living conditions in the country, investments, development of services, and through that – the creation of new jobs and better livelihoods also outside agriculture. However, the core of this program was to activate the rural population (Wilczynski 2000). Rural Renewal is defined here as: planned development process implemented by the community based on local resources and using external support (debate 2012: 7). Rural Renewal was to focus on: improving the standard and quality of life of rural residents, preserving the identity

and integrity of the village and its economic development (Wilczynski 2000). Local (endogenous), and external (exogenous) resources were to be used in the socio-economic development. The Rural Renewal Programme was supposed to be comprehensive, i.e. corresponding to the different problems of the entire municipality/village and not just selected groups of citizens or one field, as well as be based on the participation of residents in the development process and making use of the potential of external institutions for expert assistance in solving local problems (*ibidem*: 15).

The issue of rural renewal in Poland considerably gained importance after the accession to the European Union and the emergence of the possibility of using the available funds to support programs in rural areas. Rural Renewal while in the first term programming in the Sectoral Operational Programme “Restructuring and modernization of food sector in the years 2004–2006” (hereinafter SOP) has been linked to and entered into the framework of Sustainable Rural Development. Scheduled financial support for the measure 2.3 “Rural renewal and the preservation and protection of the cultural heritage of rural areas” was then 90 million Euro (Kowalczyk 2007). With this action across the country 1 199 municipalities have benefited, that is 55.20% of all eligible units have benefited from the aid support. In the Lodz region the percentage was 47.17%.

The rules of Rural Renewal refer to the neo-endogenous development principles, which includes the endogenous and exogenous forces in the development process (Ward et. al. 2005: 5). The main role, according to the British village sociologist, C. Ray, are being played into the development of human and social resources, so the local community and structures created by it: organizations, associations or LEADER type initiatives (Ray 2003, 2006). The local social agents perform the role of the main change catalyst through collective action. The animation of the development processes must be based on a grassroots initiative and take into account a bottom – up approach, as well as distant factors (extralocal) (Gorlach 2013: 106). As pointed out by Ray, it is not possible to guarantee the integrity of the development at the local level, by cutting off the community from the outside world, as it sometimes is accented in extreme endogenous development concepts (see Klekotko 2012). Therefore the neo-endogenous development emphasizes the participation of community members in the development and implementation of development practices and the use of local environmental and social values. This perspective also highlights the impact on the future of their community, both through the use of local resources and creating mechanisms for sustainable development, initiated by an external stimulus (Gorlach 2013: 106).

Rural Renewal Programme can be considered as one, with the aim of sustainable development, accomplished by:

- “The rejection of the principle of domination of the economic sphere over the socio-cultural and natural sphere,

- The realization of the principle of subjectivity of the village and its inhabitants,
 - Change of social location of agriculture (recognition of sustainability of the family farm, the farmer’s recognition as the manager of the natural and cultural heritage and material compensation for performing these duties),
 - Recognition of modern information and communication media as an essential instrument for economic and social development of the rural area,
 - Strengthening and rebuilding of the cultural identity of the inhabitants of the village, as a guarantor of the protection of cultural diversity of the united Europe” (Kaleta 2007: 82).

The sustainable development of rural areas within the confines of the Rural Renewal Programme is active in three areas:

1) social – involving the creation of community planning concerned and the pursuit of positive change in the place of residence by:

- activation – the process of stimulating the local community to act; triggering civil initiatives and participation in them,
- education – teaching; examples of good practice,
- integration – the creation of a rural community (formation of social ties); focusing local communities around common issues and problems,
- strengthening cultural identity – through the preservation and protection of cultural heritage (customs, rituals, costumes, local products);

2) environmental (natural) – by seeking to preserve the natural values of the area, but also spatial, concerning ensuring the “superficiality” of the village, its spatial design, aesthetics and functionality, to meet modern requirements while maintaining local cultural heritage. This is done by:

- protection of the natural environment – ensuring the quality of the environment (according to the spatial planning of the village),
- revitalization, maintaining or restoring the appearance of the village maintaining traditional specific structural elements, taking into account the manifestations of the progress of civilization, creating a space for recreation for the village population, also outside the village itself;

3) economic – consisting of the development of the economic sphere of the municipality:

- developing entrepreneurship, local investments,
- creation and safeguarding of jobs,
- attention to obtaining financial capital etc.,
- attention to the improvement, development of rural infrastructure (according to the preapproved urban planning of the village).

In this sense the Rural Renewal Programme is in line with the concept of sustainable development. The social, cultural and natural – environmental aspects of the village are taken into account in the economic development.

Implementation of the “Rural Renewal” in the Lodzkie Voivodeship and the sustainable development of the area – typologies of projects and their specificity

Lodzkie Voivodeship, in comparison to other regions in Poland, is a specific area. Intensive development of the Lodzkie Voivodeship, the capital of which is the city of Lodz, began in the nineteenth century as a result of the development of industry, especially textile. The processes of industrialization has led to the emergence of a great industrial – urban agglomeration (Wójcik 2013: 43). The collapse of the industry in the early 90s led to significant changes in the economic structure of the region. The processes of migration of rural residents to Lodz lost their intensity. The average size of farms which is about 10 ha does not allow for the professionalization of agriculture. De-agricultural trends cause the need to look for alternative sources of income. The inhabitants of this region are characterized by a low level of social capital (see Starosta, Frykowski 2008) while the level of their self-organization intended to overcome the problems of their home village is low.



Map 1. Location of the Lodzkie Voivodeship on the map of Poland

Source: <https://www.google.pl/search?q=województwo+lodzkie+mapa> [date of access 25.03.2015]

According to the guidelines of the Rural Renewal Programme, the implementation of projects would yield concrete results in regeneration (recovery) of

economic, social and natural spheres. In the light of the programming documents, the implementation of the measure 2.3 “Renewal of the village ...” SOP for the years 2004 to 2006, was designed in particular to:

- 1) raising the standard of living and working in the countryside,
- 2) increasing the touristic attractiveness,
- 3) increasing the investment attractiveness,
- 4) meet the social and cultural needs,
- 5) development of the rural community identity and heritage conservation (SOP: 82).

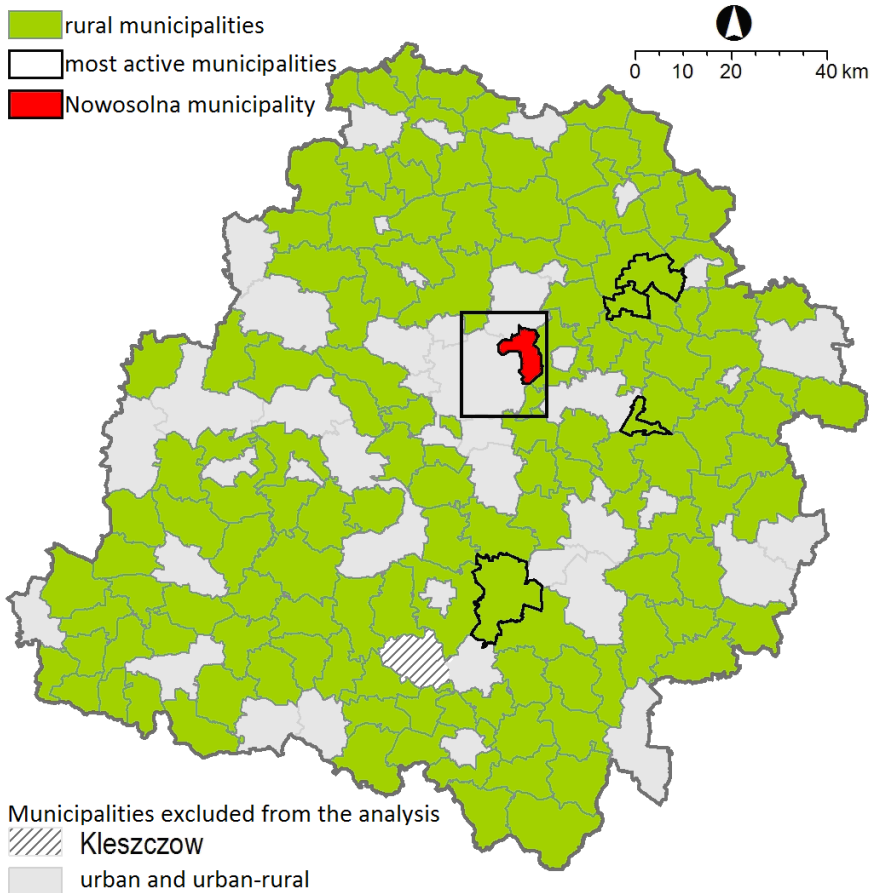
Financial support could count projects involving:

- 1) the investment in the modernization and equipping of cultural, recreational and sports facilities;
- 2) restoration of historic buildings typical of rural building traditions of the region and their adaptation for public purposes;
- 3) modernization of the public space of the village;
- 4) public infrastructure contributing to the development of tourism in rural areas and activities related to the promotion of the region (SOP: 82).

In the Lodzkie Voivodeship in the years 2004–2006 235 applications were submitted for support for rural development from this initiative. 141 were approved, and 131 implemented. Projects were submitted by 75 local governments and 3 institutions of culture. The average number of completed projects in the municipality, is: 1,75. Most of multiple projects have been implemented in five municipalities of the province: Budziszewice, Lipce Reymontowskie, Makow, Wola Krzysztoporska (4 projects each) and Nowosolna (six projects).

Among the 131 projects submitted by local rural and rural-urban communities (as a result of the analysis) 8 types were isolated.

- 1) renewal of the village centers, i.e. squares, parks;
- 2) the renewal or buildings from scratch of sports and recreational facilities: sports fields, squares, playgrounds, stadiums. This type of investment was mainly aimed at children and young people, with the aim making use of their free time, but ultimately served the whole community;
- 3) renewal of cultural life through repair or adaptation of premises for the centers, cultural centers, including community centers and libraries;
- 4) spatial infrastructure renewal, so the construction of paths, sidewalks, parking lots, in order to fill the gaps in infrastructure, but also, for example, in order to increase the touristic attractiveness of the area;
- 5) renewal and preservation of the cultural heritage of the village. The composition of this type included projects such as the renovation and revitalization of the historic museum park;
- 6) renewal of environmental values, such as reconstruction or development of water reservoirs.



Map 2. Division of the Lodzkie Voivodeship into municipalities, including rural communities most active in the activities of Rural Renewal

Source: own research

The seventh type (“other”) consisted of projects, which could not be unambiguously assigned to one of these types, and the last, the eighth consisted of projects that included in scope more than one type of project.

Most of the projects carried out in the Lodzkie Voivodeship was for the renewal of a third type: cultural life (57 projects, it is close to half of all rural renewal projects in Lodzkie Voivodeship). The second place were the projects of the second type, on the renewal of sports-recreational, it consisted of 26 projects. Together, these two types of projects accounted for 63% of all projects.

Below (Table 1) is the lists the types of projects and their reference to the components of sustainable development.

Table 1. Types of projects in Rural Renewal and the components of sustainable development

Type number	Type name	Number of projects in type	Reference to the components of sustainable development
1.	RENEWAL of the village centers, i.e. squares, parks.	12	social, environmental (spatial aspect)
2.	RENEWAL or building of sports and recreational facilities: sports fields, squares, playgrounds, stadiums.	26	social
3.	RENEWAL of cultural life through repair or adaptation of premises for cultural centres, including community centres and libraries	57	social
4.	RENEWAL of spatial infrastructure, so the construction of paths, sidewalks, parking lots	5	economic, environmental (spatial aspect)
5.	RENEWAL and preservation of the cultural heritage of the village	8	social
6.	RENEWAL of environmental value	3	environmental (protection aspect)
7.	Other	3	–
8.	Mixed: 1&4; 2&3; 1&3&4; 2&4; 1&3; 1&2; 1&5	17	social, environmental (spatial aspect), economic
Total		131	

Source: own research.

Therefore, the Rural Renewal Programme in the scale of the entire region of Lodz (between 2004–2006) was aimed mainly at the social sphere, less on the economic (only 5 projects related to renewal of the technical infrastructure and spatial), and the least – natural (only three projects related to health strict environmental values municipality).

Projects linked to the social component of sustainable development were primarily aimed at the integration of the communities, their activation by creating a forum for the exchange of experiences, recreational space for the utilization of free time not only children and adolescents. This shows that rural areas still lack such sites or that they are not sufficiently retrofitted to be able to perform these functions (integrating, activating). Strong desire to have such places is reflected in the amount of projects. The projects aimed at enriching the economic and environmental spheres of selected municipalities appeared later. Compared to projects that enrich the social component, they accounted for a small proportion and were in the vast minority.

This situation demonstrates the dominance of projects whose expected results support the implementation of the social component of sustainable development. It is therefore a renewal aimed primarily at creating conditions for social integration, strengthening contacts, building social capital.

The statements of the respondents (experts from Nowosolna municipality) are the confirmation to the above conclusions. Respondents evaluated the importance of both the entire Rural Renewal Programme, as well as individual projects (for example: the common room built in the village Byszewy and the urban planning design for the centre square in the Moskwa village).

The commune head stated: *Thanks to the Rural Renewal implemented under the Sectoral Operational Programme, people are more aware of the changes they are experiencing. Approach to projects such as the common good, value of the environment, are more integrated. It's a good start for a civil society, which could be involved in the joint management of the municipalities, districts, and province [...] The leader is most important in Rural Renewal. With my knowledge, which I gained... with what I learned, what I implemented, what I practice, I wanted to hand it over to the residents, and include them in the process. Because Rural Renewal is not only is the revitalization of the space, but also of the disappearing idea. Residents themselves participated in the implementing of the projects [...] You have to realize "living" projects which people really benefit from, that meet specific needs, e.g.: village centres, school grounds.*

The community leader from village Lipiny added: *The cool thing about Rural Renewal is that you can learn from the examples of others, pry, observe, and then think about what to move to your area. We travelled with a delegation to the village of Biesowo, where the mayor and the priest acted very promptly. They started the Rural Renewal, and pulled the residents with them. Now it all works very well, people care about all these projects and others can learn from them.*

In the opinion of community leader from village Byszewy: *With the construction of the activity centre common-room [...] I think some stereotypes are less prominent, the environment has become more homogeneous. In the common-room we have meetings, celebrations, for all. For example, those who have not come, had the opportunity to come and see that it is good. I think of these higher values as the abolition of the divisions in the community.*

The Chairman of the Municipal Council of Nowosolna and a resident of the village of Moskwa stated that: *Maybe there is just a fab that people go to this place ... adults or children. This square is very utilized. The square has a bower and in the bower we meet. Besides, Moskwa does not have a activity centre [...] In fact, anywhere else, nothing happens, but everything happens in this square ... meetings ... so we have an open lounge.*

The same chairman (who was also a resident of the village of Moskwa) stressed that: *In my opinion, it is the integration that is the best in the Rural Renewal. Because when something starts, this same man will not do everything... someone has to help him and talk it over. And when a few people that did not get along start to do so, it already is a big plus. The most important thing is the atmosphere in the community. If you are lacking this atmosphere, you cannot do anything.*

Summary

The “Rural Renewal” has been operating in Poland since the late nineties of the twentieth century. Its essence is to provide financial resources for solving problems of local communities, taking into account the principles of sustainable development. They also take into account the harmonious development of the three spheres of human activity: economic, social and environmental. The success of sustainable development cannot be linked exclusively with economic and natural capital. Equally important is also social capital. The development is in fact initiated by activating the human and social resources.

In its principles, the implementation of projects in the field of Rural Renewal, under the Sectoral Operational Programme 2004–2006, aimed to contribute to the sustainable development of the areas included in the project. It was assumed that the Rural Renewal financed from the first EU funds, will harmonize the development of the natural, social and economic areas of deficit in its own way, but with a chance to develop. It was an aid scheme. As it is shown in the analysis of the types of renewing projects implemented in the Łódzkie Voivodeship, it was dominated by those of a social nature: Renewal and development of the socio-cultural; Renewal of sports – leisure centres, Rural Renewal. These projects consisted of investments in human and social capital of the village. A question arises whether the Rural Renewal Programme contributes to the sustainable development of rural areas or just specific parts of it? In the light of the results presented it should be stated that in the municipalities of the Łódzkie Voivodeship Rural Renewal supported only one area of development. Social sphere has been recognized by the applicants (more or less consciously) as a key factor. The social capital built has given way to other ventures in the economic and natural, which may be implemented by the community in order to harmonize development. Supporting the development has a broad social dimension and is aimed at local communities. Sustainable local development should therefore be considered in terms of the development of rural communities, and this, by definition, should be used for proper implementation of the Rural Renewal Programme.

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Katarzyna Zajda, PhD

Department of Rural and Urban Sociology
University of Lodz

DETERMINANTS OF SOCIAL INNOVATIONS IN POLISH RURAL COMMUNITIES

Introduction

Understanding the term “innovation” causes many problems. On the one hand, they may lead to trivializing and banalizing the meaning of innovation, i.e. considering all that is new as innovative. On the other hand, they may result in the belief that innovations are only reserved for a narrow group of economic establishment, largest (wealthiest) institutions, organizations which have the potential to create solutions that will be applied on the market and bring their authors concrete financial profits. Social innovations are not commonly identified among other kinds of innovations as those that are neither directly associated with the market nor require considerable financial expenditure. Instead, they are a response to social problems which can and should be solved with the participation of various social communities.

Extensive literature concerning innovations has been dominated by economic perspectives and discourse concerning relations between innovations and economic growth. But innovations (not only social ones) are created for people and by people, and therefore their social determinants should be considered as equally important as (or even more important than) the economic ones. These include the community members’ ability of social participation, participating in different social networks, or – more broadly – the potential of their social capital.

The aim of the article is to present the determinants of social innovations in the context of characteristics of Polish rural areas, with particular emphasis on the social capital of their inhabitants.

Social innovations – definitions and social determinants

Not every innovation can be called social innovation. In terms of the subject criterion, we can identify technological innovations (including product innovations and changes in the process of manufacture), organizational innovations (either connected with technological innovations or not), ecological innovations (defined as changes preventing negative influences on the natural environment) and social ones (Najder-Stefaniak 2010: 14–15).

In the Guide to Social Innovation, the European Commission defines social innovations as: “the development and implementation of new ideas (products, services and models) to meet social needs and create new social relationships or collaborations”. It emphasizes that social innovations are a response to challenges related with and resulting from the process of social interactions. Their goal is to improve the quality of life of individuals and communities (Guide to Social Innovation 2013: 6). Davies, Caulier-Grice and Norman propose a similar understanding of innovations, stressing that: “Social innovations as new solutions (products, services, models, markets, processes etc.) that simultaneously meet a social need (more effectively than existing solutions) and lead to new or improved capabilities and relationships and/or better use of assets and resources. Social innovations are both good for society and enhance society’s capacity to act”¹ (2012: 5). MacCallum and Mehmood, analyzing different definitions of social innovations, observe that they have one thing in common: they all emphasize the importance of the ultimate goal, which is solving (or reducing) social problems (apart from market institutions) on the basis of participation of many social actors, primarily the ones that are affected by the problems (2010: 4).

Social innovations include:

1) “Social demand innovations which respond to social demands that are traditionally not addressed by the market or existing institutions and are directed towards vulnerable groups in society. They have developed new approaches to tackling problems affecting youth, migrants, the elderly, socially excluded etc.” (Guide to Social Innovation 2013: 6).

2) “Innovations for society as a whole through the integration of the social, the economic and the environmental” (*ibidem*: 7).

¹ This understanding of innovation differs from the definitions established in sociology by Merton, and in Polish sociology, by Makarczyk. According to Merton, innovation is one of the possibilities (apart from conformity, ritualism, retreatism and rebellion) of achieving normative social goals. Members of each community can choose from these possibilities and the determined ways of their implementation. Innovative individuals do not behave in accordance with the adopted definitions, yet they also strive to achieve the set goals (Merton 2002: 198). Makarczyk, in his work *Przyswajanie innowacji* (regarded to be the pioneering one), identifies innovations with all cultural values which are treated as new in particular spatial and temporal conditions (1971: 9).

3) “Innovations concentrated on organizational changes of relations between different institutions and their stakeholder groups” (*ibidem*: 6–7).

Literature of the subject describes many examples of social innovations. Most of them are the effect of implementation of projects financed with EU funds. Andersen, Delica and Frandsen describe the effects of a project “From Book Container to Community Centre”, during which a local library located in the poorest district of Aarhus, Denmark (with a particularly high percentage of immigrants) was transformed into a resident support centre. The library referred to as “a book container” was given the function of an institution providing immigrant counselling and training services, as well as educational services for children from ethnic minorities. It became the key element of the local network of institutions involved in solving social problems of district residents, including e.g. non-governmental organizations, but also citizens and their informal groups (Andersen, Delica, Frandsen 2010: 76).

Another example of social innovations is described by Millard. In the project “Ageing and New Models for Elderly Care”, the so-called Homeshare International Model was applied, involving help for young people, especially students, in finding lodgings with (mostly single) elderly people. The young ones gained relatively cheap accommodation, and the elderly, assistance and new relationships preventing them from social isolation. The project was a response to problems of the ageing society (such as exclusion, social isolation, health conditions making housework difficult) and the young generation (e.g. limiting labour-related migration due to high costs of flat rental) (Millard 2012: 29).

Literature of the subject analyzes among others the determinants of creation and diffusion of social innovations connected with human and social capital (see Pietraśiński 1971: 13). As for the determinants connected with human capital, the traits of individuals which promote the creation and implementation of innovations as well as their diffusion are mentioned most often. Sztompka enumerates individuals’ creativity, activity, imagination, orientation at achievements, acquiring knowledge, high sense of autonomy, independence and integrity (2005: 50). According to Hagen, people who have a special potential for creating innovations are those characterised by: 1) curiosity, active attitude towards the world, looking for hidden mechanisms and regularities so as to be able to influence phenomena; 2) the sense of responsibility for the bad sides of the world, accompanied by looking for better solutions and trying to introduce changes; 3) open-minded and tolerant approach to subordinates, positive attitude to originality and innovativeness; 4) creativity, unsatisfied curiosity, positive valuation of what is original and new (Hagen quoted in Sztompka 2005: 225). Such people also have a pioneering attitude to innovations, which – as emphasized by Ratajczak – is manifested in autonomously looking for new solutions not used before, or at least a receptive attitude revealed in positive evaluation of innovations and readiness to follow them. People with low levels of human capital more often have a conservative attitude to innovations, involving an adverse, sceptical approach (1980: 194).

As for the determinants of creation, implementation and diffusion of social innovations connected with social capital, scholars emphasize the importance of various social networks being the basis for cooperation of individual and collective actors based on mutual trust and shared values and social norms for the whole process (Pietrzyk 2000: 51).

English-language devoted to the relations between social capital and innovations refers to the studies of a classic of the concept of social capital, Coleman, who (together with his co-workers) analyzed the diffusion of innovations among doctors. Investigating the prescriptions of new drugs, he found that the doctors who participated in complex social networks were better acquainted with innovations in that regard. They learnt of innovations from other network participants rather than from scientific literature (Coleman et al. 1966).

The analyses of Granovetter and Soong, showing that the predisposition to absorb innovations is a function of behaviours of other network members (1985: 165–179), are also pointed out, along with those by Gladwell, who emphasized the importance of so-called “connectors” within social networks – entities with the number of connections with other participants higher than average – for the innovation process (2000). The homogeneity of a network does not help create social innovations within it. According to Rogers (a supporter of the concept category of “social system”), diffusion of innovations is most effective when quite similar, but not identical, social actors are the participants. Homogeneity greatly limits the variety of resources held by the system, and thus it minimizes its opportunities to initiate social exchanges (2003).

Social innovations are not created without the involvement of citizens, their organizations, and various associations. They are the effect of a social interaction process, including four stages: 1) identification of new/unmet/inadequately met social needs; 2) development of new solutions in response to these social needs; 3) evaluation of the effectiveness of new solutions in meeting social needs; 4) scaling up of effective social innovations (Guide to Social Innovation 2013: 6). The chances for implementation of the social innovation process are related to social participation. Davis, Simon, Partick and Norman explain this relation by pointing out:

1) the goal of social innovations, which is to satisfy social needs, requiring their identification and defining by the stakeholders themselves, as they have the tacit knowledge about these needs, not always shared with others (2012: 5–6);

2) reduction of costs of creation and implementation of innovations, connected with the participation of citizens, target groups of stakeholders interested in eliminating or solving their social problems. According to von Hippel, the participation of innovation recipients in identifying needs, creating an innovation and applying it shortens the transfer chain by the unnecessary engagement of third parties responsible e.g. for the identification of social needs (Hippel 1994: 429–439). Westley is of the opinion that eliminating one of the groups from the

innovation process when it concerns that particular group causes a serious loss for the creation of that innovation (2008);

3) resources generated thanks to social participation connected with tacit knowledge provided by the stakeholders in the process of social creation of innovations. As highlighted by Bason, including a higher number of people in this process allows for creating a whole repertoire of various possibilities, only few of which can be finally chosen (Bason 2010: 8–9).

In another work, Davies and Simon add that the inclusion of citizens in the whole process of social innovations legitimizes it, and thus facilitates the change of their attitudes, opinions and behaviours (2012: 6).

Selected characteristics of social capital of rural communities and the mechanisms of stimulating social innovations in rural areas

In the past and in the present alike, there were and are many problems providing the basis for creation, implementation and dissemination of social innovations. They give the hope, not only for eliminating or solving the problem, but also for stimulating the resources of social capital (Guide to Social Innovation 2013: 10–11). Moolaert and Nussbaumer underscore that social innovations are particularly important for rural and poorly urbanized areas, where many social problems occur although they are often trivialized or go unnoticed (e.g. famine is less acute in the country because people can always rely on the produce of their own gardens) (2007: 16). On the other hand, some characteristics of rural communities, such as the level and type of their social capital (bonding versus bridging), can “counteract” innovations (see Putnam 2008).

Rural residents display much less trust than town (especially city) residents (Cybulska 2012: 4–5). However, they have greater trust in institutions functioning in the public sphere (such as the Great Orchestra of Christmas Charity, Caritas, Polish Red Cross, the army, scouting organizations, the Roman Catholic Church, the police, local authorities, the European Union, NATO, courts, newspapers, the government, political parties, the sejm and the senate) (*ibidem*: 15–16). They also put greater trust in their direct environment (closer and farther relatives, friends, co-workers, neighbours, parish priests, and local people who engage in work for the community) (*ibidem*: 9–10). They are ready to work voluntarily for their own environment. They are less willing than city residents to support strangers (Kowalczyk 2012: 2, 6) and less often agree with the opinion that people such as them, co-operating with others, may help those in need or are able to solve some of the problems of their own environment, area, village or town (*ibidem*: 4).

People living in the village declare above-average level of social activity, admitting that in the previous year they worked for their own environment, church, area or village, or for people in need, on a voluntary basis and free of charge. In 2012, 26% of rural residents made such a declaration, in comparison to 22% of those living in towns with up to 20 thousand residents, 17% of those from towns with 20 up to 100 thousand residents, 17% of those from towns with 101 up to 500 thousand residents and only 9% of people from the biggest cities (Hipsz 2012: 13). Social activity of rural residents is mostly informal. As compared with residents of biggest cities, fewer of them belong to formalized organizations or heterogeneous structures.

Hence, the characteristics of social capital of rural residents lead to the conclusion that it is still rather bonding capital with the family-neighbourhood-parish nature. These features, however, are not coherent, so they can be interpreted in various ways. For example, in the opinion of Fedyszak-Radziejowska (analyzing the social capital of rural residents in the “Report on the condition of Polish rural areas of 2012”, also drawing on a study carried out by CBOS in 2012), the capital is undergoing a qualitative change and is losing its traditional, family-neighbourhood character. The author even draws the (rather risky) conclusion that: “Social capital of Polish rural areas is a strong side of their residents, especially farmers. Even if new CBOS studies show that it still has a more family-neighbourhood-parish nature than the social capital of wealthy big city residents, working for the sake of friends and occupational environments, its level is relatively high and – what is important – present in citizens’ activity in social associations and organizations. The strong side of social capital of rural areas is the high acceptance of norms of cooperation and collaboration connected with religiousness and manifested, among others, in the activity for the benefit of the parish” (Fedyszak-Radziejowska 2012: 123).

If we assume the thesis that the social capital of rural residents is closer to bonding than bridging social capital, we must accept that it does not promote social innovations. Neither does perceiving rural residents in terms of traditionalists and people with negative attitudes to social changes. As we can see from CBOS analyses, such an image of people living in Polish villages is still common (Hipsz 2014: 4), and the social mirror into which they look may have a negative impact on their attitudes towards innovations. They have difficulties with defining an innovation (cf. Tuziak 2013) and often do not believe it can be created without the use of huge financial resources (see Zajda 2012). However, Krzysztofek and Szczepański emphasize that: “If the need – and thus acceptance – of change is not well established in the individual and collective awareness, the change will occur slowly, and often be deformed. That is why it is so important to help the main actors and subjects of change – both local and regional communities and individuals – realize the need for that change” (Krzysztofek, Szczepański 2002: 41).

The goal of methods of stimulating social innovations is not only to create concrete actions aimed at eliminating a certain problem but also to activate citizens

to participate in the process, to strengthen their social participation on the basis of social trust and shared norms and values which enhance communitarian attitudes.

An interesting typology of methods of engaging citizens in the process of social innovations (applying techniques used in sociology as study techniques) was proposed by Davies, Simon, Patrick and Norman, who used two criteria: 1) informing about present states vs. future solutions; 2) including few citizens in the process of social innovations vs. including many of them in the process.

Informing about present states refers to the ways in which citizens can be the source of information concerning their current problems, experiences and challenges. This information is necessary for innovations to be created and is fundamental for the execution of the first stage of the process. Social engagement is also important in further stages of implementing innovations: testing prototypes and first-time introduction of certain solutions so as to check their effectiveness.

The future solutions criterion refers to any forms of engagement that make it possible for citizens to shape ideas underlying innovations. The ideas may be new, but they may also be associated with changing the existing order, improvement, or adjusting to the challenges faced. Citizens can create ideas on their own, but they can also help others (so-called innovators) in this regard. Engagement allows to include citizens in the execution of innovations and avoid the problem of learned helplessness (cf. Leadbeater 2009: 2).

The other criterion accounts for the difference between the number of citizens engaged in the process of innovation. Methods which include many of them (the authors do not specify how many) allow to recognize hidden phenomena and potential underlying patterns of action, behaviours and trends. Methods which include few citizens allow to complement this statistical image with qualitative data or to illustrate the problems of small groups.

The two criteria can be used to analyze the methods of civic engagement in the process of innovation with two questions. First, what kind of input do citizens contribute into the innovation process? Does it involve providing information on the present problems, or rather information that allows to create future solutions (exceeding the present perspective)? Second, what is the scale of civic participation in the process of social innovations? Do many of them participate in the process, or are they rather individuals or small groups? (Davis, Simon, Partick, Norman 2012: 17–18).

The methods which include few citizens in the process of providing information necessary for social innovations and pertaining to their present situation are among others: user-led research and citizens mapping needs (*ibidem*: 21–22).

User-led research means research carried out for the purpose of social innovations, designed in cooperation with the actual participants. They are included in each stage of the research process, beginning with the concept, through the formation of the sample, the field stage, data collection, analysis and drawing conclusions (*ibidem*: 27).

Citizens mapping needs – the most popular in this group of methods is so-called RPA – Participatory Rural Appraisal – used in the development of social innovations in Africa and Asia (also called Participatory Learning and Action). Including citizens in the process of social innovations involves encouraging marginalized groups to design their own research on the subject, based on direct communication, visualization, and recording (the methods takes into account the high illiteracy level among the members of those communities). The participants may also serve as guides, showing professional researchers their local communities. Thanks to so-called transect walks, it is also possible to verify information coming from the application of other mapping methods. As part of the study process, maps are created which describe the key elements of the community's life, relations occurring within it, the way of functioning and the social problems (*ibidem*: 23).

The informing about present states methods activating many citizens to participate in the process of creating social innovations include:

Crowdsourcing data platforms – Internet platforms where citizens can express their concerns about social problems that bother them, e.g. FixMyStreet.

Rating platforms – platforms which allow citizens to share their opinions on different public institutions, e.g. health care centres (for example in Great Britain – I Want Great Care, in Poland – RateMyTeachers.com).

The Developing future solutions methods which include few citizens in the process of social innovations are: Co-design, Idea camps, or Positive deviance inquiries.

Co-design – it involves inclusion of citizens in the process of social innovations using a series of theme-based workshops aimed at the development of concrete solutions for clearly defined social problems (*ibidem*: 36).

Idea camps – a kind of away-from-home workshops devoted to social innovations, with participation of the actual groups that need support.

Positive deviance inquiries – a method aimed at pointing out to the stakeholders what social problems there are and developing ways to solve them by following good examples (*ibidem*: 38–39).

Participation in the process of working out Developing future solutions makes many citizens apply methods of participation such as: Idea banks, Competitions, or Large-scale ideation exercises.

Idea banks – banks of ideas, known since 1968. Currently used in Amsterdam, Berlin and Paris as part of the “Open Cities” project. They involve citizens suggesting proposals of solutions to particular social problems to the local authorities.

Competitions – they make it possible to obtain assets for financing one's own ideas for social innovations. For example in 2010, the Rockefeller Foundation, GlobalGiving and InnoCentive announced a competition for innovations concerning water treatment in developing countries. More than 2.200 people took part in it and the main prize was \$ 40,000.

Large-scale ideation exercises – methods which involve meetings for large numbers of citizens, devoted to solving social problems. One example of these

is Future City Game, developed by British Council, Centre for Local Economic Strategies and Manchester's Centre of Urban Life. The participants of a meeting (city residents with various socio-demographic characteristics) work in groups to work out ideas underlying social innovations (*ibidem*: 30–34).

The presented methods of activating citizens to participate in the creation and implementation of social innovations were used both in urban and in rural communities. The weakness of some of them, however, is the short time when community members can cooperate: mostly it is participation in a single concrete innovation process, aimed at the development of a particular social problem that affects them.

Selected problems of Polish local action groups preventing activities aimed at social innovations

The method that is used in rural areas of Europe with a view to implementing social innovations and based on long-term interactions between representatives of the local community, including those who are not directly affected by the innovation is LEADER.

The method itself is also considered as innovative and very difficult to implement, because it assumes among others a change of relations between rural residents representing three sectors: public, social and economic (Zajda 2011; Psyk-Piotrowska et al. 2013).

In accordance with the assumptions of LEADER, representatives of those sectors are associated in organizations called local actions groups. In Polish literature of the subject it is emphasized that the relations between them may be difficult, especially in the case of representatives of local authorities (the public sector) and entrepreneurs (the economic sector). Researchers point out that in offices entrepreneurs are treated as intruders, unwanted (demanding) guests, exceptionally pragmatic – only interested in cooperation that can bring them profits, preferably within a short period of time (Kłodziński, Rosner 2000: 150). What is more, local authorities favour some of them, usually establishing contacts with the owners of the largest companies of key importance for local development, or with the entrepreneurs who have already proved useful in cooperation and can co-finance different investments or cultural events (Zajda 2013).

Polish researchers often view negatively the paternalistic system existing between local authorities and the social sector, in which local authorities have a privileged position, thus limiting the autonomy of non-governmental organizations. In addition, they point out that authorities give priority to voluntary fire brigades, sports clubs and farmers' wives' associations, perceiving other organizations as potential bases for new political leaders, namely their rivals (see Herbst 2008a; Herbst 2008b; Śpiewak 2008).

Interactions between entrepreneurs and non-governmental organizations are generally difficult in Polish rural communities. The former, mainly looking for opportunities to sell their products and services in the local community, usually cooperate with NGOs (e.g. by sponsoring their activity) when they can see the possibility to increase their competitiveness. The latter perceive small and medium-sized rural entrepreneurs from the perspective of tough market competition, not as philanthropists willing to support local NGOs disinterestedly (Zajda 2013).

Thanks to the LEADER method, these sometimes very difficult relations between the three sectors may be changed, by inviting them to long-term cooperation in local action groups aimed at multifunctional and sustainable rural development. The change of those relations is supposed to strengthen the social capital of representatives of the three sectors involved in their activity, defined as cooperation potential based on social trust and shared norms and values. On the one hand, social interactions not limited to a single project but rather lasting many years can lead to the creation and implementation of the social innovation involving permanent three-sector partnership. On the other hand, they can result in the creation of other social innovations, which would be oriented at solving or eliminating social problems faced by the residents living within the partnership for which the local action group works.

The relationships between members of Polish local action groups were analyzed in the research project “Structure and determinants of social capital of the local action groups”, carried out in the years 2011–2013².

The case study method was applied in the research. Putnam’s perspective of social capital (assuming that it is a system of three mutually determining components: trust, a network of connections among community members based on that trust, and the norms and values determining behaviours in relationships among them) was adopted as the theoretical basis. The object of research was: the trust component of social capital of members (partners) of local action groups, i.e. vertical and horizontal trust they display³, the component of norms and values shared by those people⁴ and the network component (i.e. the cooperation network

² Project was financed from the resources of the National Science Centre (agreement No. 6996/B/H03/2011/40). The research team: dr hab. E. Psyk-Piotrowska, prof. nadzw. UŁ, dr K. Zajda, mgr A. Kretek-Kamińska, prof. zw. dr hab. D. Walczak-Duraj.

³ In the case of the trust component, the following variables have been stressed: 1) trust of LAG members to familiar persons (family, neighbours, colleagues from outside LAGs and colleagues from LAGs); 2) social trust of LAG members (belief that the majority of people can be trusted and trust to strange persons encountered in various life situations); 3) trust of LAG members to local institutions and organisations (local authorities, non-governmental organisations, local entrepreneurs).

⁴ In the case of the component of norms and values, the following aspects have been analysed: 1) local patriotism of LAG members – their bond with their commune of residence, participation in the last local self-government election, readiness to bear expenses for promotion of local

of members or partners of those organizations⁵). The study covered local action groups from voivodeships with the lowest and highest number of such organizations working in their areas⁶.

1500 survey forms were distributed, 586 of them were returned, and 573 surveys from members of 34 out of 59 local action groups to which the request for participation was sent were qualified for further analysis (due to the content, especially numerous cases of lack of data).

The conducted analyses showed that in the investigated LAGs there were phenomena which made it difficult for authentic partnership to develop: relationships which might increase the effectiveness of cooperation of LAG members also for the sake of implementing social innovations.

culture; 2) values and norms shared by LAG members – due to the character of LAGs, partnership is an important value, understood as an area which is coherent in the aspects of natural environment, economy and culture. Attempts have been made to determine the reasons for membership in an organisation, and whether LAG members (partners) operate for its good or they are more focused on the interest of one specific social group or their personal interests. Moreover, the researchers have analysed the respondents' attitude towards the norm of three-sectoral cooperation (to check if they are convinced that all members of this organisation should cooperate regardless of whether they represent the social, public or economic sector) and the level of their conviction that it is necessary for LAG members to know the LAG operational procedures; 3) socially-involved attitude of the surveyed – their readiness to provide support to other people, willingness to continue their membership in a LAG (work for the common good). The level of sense of subjectivity of the surveyed has also been analysed (understood as a conviction that they have control over their own lives).

⁵ In the case of the network component, the following variables have been listed: 1) involvement of LAG members in networks of cooperation for their partnership or commune; 2) participation of the surveyed in LAG works – assessment of their activity in LAG works during implementation of scheme 2 of the LEADER+ Pilot Programme (including assessment of the forms of their activity in a group, frequency of participation in LAG general meetings, flow of information about group meeting among LAG members); 3) sense of LAG members having influence on functioning of the partnership and conviction of the surveyed about the influence of LAG operations on development of the partnership.

⁶ The analysis covered the organisations from western voivodeships, i.e. Lubuskie, Opolskie and Zachodniopomorskie (included in the 1st set – voivodeships with the smallest network of LAGs), and from central and southern voivodeships – Wielkopolskie, Małopolskie and Podkarpackie (belonging to the 2nd set – voivodeships with the highest “saturation” of this kind of organisations). Thus, the research was conducted in 6 out of 16 voivodeships. So far, the publications resulted from the analyses conducted in three voivodeships at the most. Thus, it was interesting to determine whether problems of local action groups observed in these regions are shared by such organisations from other parts of the country.

All the groups operating in the selected voivodeships were requested to participate in the survey (59 LAGs). Representatives of slightly more than a half of them agreed (34 LAGs), including 9 out of 14 local action groups of set 1 and 25 out of 45 local action groups from set 2.

The research was conducted as an individual survey (addressed to members, partners of local action groups operating in the selected voivodeships).

These phenomena include municipalization, i.e. colonizing the LAGs by self-governmental authorities that attempted (mostly informally) to dominate their works. An example of this is the authorities influencing the composition of the governing or decision-making body of a local action group by recommending a person associated with local authorities as a representative of the social or economic sector.

Another negative phenomenon which makes the cooperation of three sectors of Polish local action groups difficult is the petrification of their management boards and councils (i.e. the managing and decision-making bodies). For many years work in these organs has been performed by the same persons, most often those who have belonged to the group since the time of implementation of the LEADER+ Pilot Programme (about 3/4 of board members have gained experience related to implementation of the LEADER approach in that very period, the same refers to nearly 3 in 5 council members) (see Zajda 2014: 87).

Local action groups lack organs (units) which would make it possible to include more members (partners) in works of these organisations. These structures are often too large to offer their members any opportunity to be pro-active (and shape in themselves the sense of actual influence on the change of the image of their villages). If there are 150–200 members in a local action group, the board consists of 5–7 members, and the number of councillors does not exceed 20, then the question arises about the space for (more or less) regular work of other members (partners) of such organisations.

Involvement in the works of local action groups is also hindered by their professionalization and economisation. They use the advisory services of so-called experts and companies which specialise in organisation of various projects much more willingly than turn to the village inhabitants, as they are afraid that audit results would otherwise show some irregularities. Such course of action is also encouraged by the fact that the procedures of LEADER approach implementation are described as very complicated (even by board and council members) (see *ibidem*: 88–89).

Problems of local action groups in the aspect of the trust component are mostly related to the trust of members (partners) of these organisations to the representatives of the economic sector and the level of their generalised trust. Those members (partners) of local action groups who belong to the economic sector were trusted only by slightly more than half of their colleagues. Mistrust characterised mainly representatives of the public sector (over 16% of these respondents answered that they do not trust them at all). The largest level of trust to them was declared by representatives of the economic sector (63% of these respondents answered in this way).

Local action groups cope with the problem of relatively low level of generalised trust of their members (partners). Only less than 20% of the surveyed declared a high level of trust to strangers encountered in various life situations, and as many as 34% of them respondent that they do not trust such people at all (see Table 1) (see *ibidem*: 89–92).

Table 1. Social trust – distribution of answers to index questions

Social trust	High		Moderate		No trust	
	number	percentage	number	percentage	number	percentage
Trust to strangers encountered in various life situations (N = 566)	112	19.8	264	46.6	190	33.6
	Yes				No	
Conviction that most people can be trusted (N = 546)	367	67.2	–	–	179	32.8

Source: compilation from the project “Structure and determinants of the social capital of local action groups”.

Yet, this is this type of trust (to strangers encountered in various life situations) determines the inclination to enter more diversified social relations and facilitates access to diversified information and taking advantage of them, including economic advantage. The low level of generalised trust reflects not only the low inclination to enter new contacts and form new networks (only the closest colleagues, mostly from one’s own sector are trusted), but it also shows how fragile the basis for current cooperation within local action groups is. Actual cooperation in local action groups often takes place within a relatively limited and closed circle of persons who have long-term high functions on decision-making organs of their groups (see *ibidem*: 90–92).

Conclusions

Many social issues cannot be solved with the use of top-down approach, traditional in social policies, among others because of the complexity of problems which do not have a single solution but rather require different solution scenarios depending on many social variables. An intervention is always a form of interaction with stakeholders, which would be impossible without their participation. Thus, for social innovations, whose goal is to eliminate social problems, the resources of social capital are necessary: trust, norms, and values which are supposed to facilitate cooperation.

Social innovations cannot be implemented in every local community. On the one hand, not all of them must develop in an innovative way, and on the other hand, not all have such a possibility due to at least three determinants: social perception of innovations as a process reserved for companies with considerable

financial capital, little human capital resources connected among others with education or creativity, and a low level of social capital (limited or low cooperation skills and will to participate in the innovation process, especially among the target groups whose problems provide the basis for innovation processes).

The LEADER method is one of the methods of generating innovations aimed at changing the relations between the three sectors of key importance for rural development. The high level of social capital represented by the representatives of local authorities, entrepreneurs and social organizations, resulting from participation in local action groups (connected with their mutual trust, shared norms and values facilitating cooperation and social activity) stimulates actions taken for the sake of social innovations aimed at solving the problems of local communities. Their successful implementation strengthens partnership and social capital resources of persons and entities within those communities. This change, being introduced into Polish rural areas with the use of the LEADER method, is treated as an unfinished process whose effectiveness may only be assessed after more than ten years. It seems that the obstacles to its introduction are not only the deficits of human or social capital of rural residents, including people engaged in the work of local action groups, but also bureaucratic procedures which have transformed these unique non-governmental organizations (so-called hybrid structures) into new local development agencies whose effectiveness depends, not on real involvement of rural residents in the process of social innovations, but rather on correct clearance of costs of operation and achievement of the assumed results.

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Kinga Pawłowska, PhD

Faculty of Administration and Social Sciences
Technical University in Warsaw

HOW TO COPE IN THE SYSTEM: SOME TACTICS OF THE INHABITANTS OF SELECTED POLISH VILLAGES¹

Introduction

A considerable part of research dealing with the transformation trauma describes Polish people using on the one hand the categories of marginalization or social exclusion but also on the other the efforts aiming to ‘re-integrate’ them. The people – as it seems arbitrarily – have been labelled as the ‘underclass’ in the newly-born Capitalism. However, in the light of contemporary research in the humanities and domination adopting such a perspective may prove disconcerting, unfair or even dangerous in the sense that it mystifies the realities of our collective life. It may turn out that using the distinction between the ‘beneficiaries’ and the ‘victims’ of the transformation leads to certain limitations in the analysis of what has really happened. Consequently, it may promote those allegedly more dynamic and entrepreneurial on the one hand but treat unfairly the others – often described as ‘impoverished’ or ‘degraded’ – functioning away from the ‘mainstream’.

It is important to realize that contemporary humanities do include the research perspectives that may constitute a true inspiration for writing about everyday life of many Poles in a somewhat different way. These perspectives comprise, among others, the concepts of ‘new cultural history’² as well as ‘strategies and tactics’ by M. de Certeau (de Certeau 2008). I dare say that both of them are valuable tools offering a – slightly different from the commonly held – view of the life of Polish people in the past quarter of the century. The historians belonging to the “New Cultural History” object to any form of subjugation, including the symbolic one. They see no reason why the poor, for example,

¹ The materials used in this article come from doctoral dissertation entitled *Dynamism of rural cosmologies: social orders and world visions*.

² The most important works dealing with the issues of *Cultural History* include: Burke 1997, 2012, 2012, 2011; Chartier 1993; Darnton 2012; Davies 2012; Ginzburg 1989; Ladurie 1988.

should be denied the right of independent thinking and expressing their opinions about the old or the new system. Furthermore, it cannot be excluded that the research whose starting point is people's material situation largely narrows down the researcher's perspective and, consequently, the conclusions reached. Moreover, considering the reservations connected with the elements of domination in humanities, doubts may occur as for the ways of carrying out the analysis from the perspective of the expansive, 'market logic' *mainstream* trends, that fail to take into consideration the essential dialogic relationship of the researcher and the researched.

Nowadays – as T. Rakowski states in the Introduction to *Humanistyka i dominacja* [*Humanities and Domination*] – “mechanisms are unveiled in a mechanical way; the pattern-creating mechanisms – usually including the central circulation of social ideas – rooted in institutions, seem not to recognize the presence of grass-roots experience; and if they do recognize them, they are accepted in dissolved, subordinated forms. This results in a situation where the grass-roots discourses and social practices remain either unheard or recognized as inadequate and incorrect. At the same time there is a group of opinions culturally dominating, created usually by intellectual elites functioning in some criss-crossing fields (arts, social sciences, journalism, public debate, politics) and generating knowledge that gains the status of legitimate one thus creating the binding standards of recognising and defining social problems” [transl. K.P.] (Rakowski 2011: 11). It is difficult not to agree with the researcher that “the most essential problem is... such a state in which central circulations are capable of generating, among the ‘local’ people including ourselves, such situations in which sometimes the most important experiences and actions start to be recognised as insignificant and devoid of any value. It is all about pushing the dominating central discourses in such a way that this subject expression, a kind of ‘internal speech’ – turned both towards others and ourselves – acquire the right momentum” (*ibidem*: 21–22).

This conception coincides with the objectives of this paper inspired by de Certeau's work. His views may not ideally fit the idea of perceiving the ways the *ordinary* people think or behave as simple carbon copies of the ones offered in the main current of culture. That is reflected in de Certeau's distinction into the ‘strategies’, connected with possession and power, and the ‘tactics’ describing the activities of ‘the weak’ forced to function in an order imposed by the strategists. This conception allows us to move away from the well-known notions of ‘passivity’, ‘exclusion’ or ‘marginalisation’ and to show how – often with the use of cunning and reflectivity – the people situated in the lower layers of the social structure ‘cope’ with the reality that seems to them alien and hostile.

Inspired by the above perspectives I will try to reconstruct the ‘tactics’ of some inhabitants of the contemporary Polish village. This notion, nonetheless, will be given a broader meaning than in de Certeau's conception. ‘Tactics’ are

all kinds of ways of ‘coping’ in the system that the inhabitants apply. Also, the ones that are expected by the power-holding ‘strategists’. It should show a relatively broad spectrum of the choices made by the villagers – those in line with the ‘system thinking’ as well as those that oppose it. The material used in the article has been gathered by the author herself in two villages in Mazovia (a region in Poland) which had first manors (Polish: *folwark*) and then state-owned farms (Polish: *PGR*).

The manor is a kind of breeding and tending farm that functioned in Poland since 12th century. It had two characteristic features; it produced goods (usually corn) for outside markets and used serfdom (initially free peasant labour). The turn of 17th and 18th centuries witnessed a crisis resulting from many a political and economic factor and a major slump in the prices of agriculture products (Skodlarski 2007). Manors, fluctuating over centuries, survived until mid-20th century. After the Second World War they were replaced by state-owned farms which were the state property and operated in Poland between the middle and the 90s of the 20th century. They resulted from the Socialist ideal – popular in Poland at that time – in the way that they constituted the ideal’s economic exemplification³. Research shows that in 1989 they covered 3,340,000 hectares (17.7% of the farmland in Poland). They offered jobs to 435,000 people; together with their family members around 2 million. That, naturally, puts a question what happened to these people after the state farms collapsed. Some of them have taken over parts of the farms, some found jobs in state or private farms, others got re-trained and found jobs other than farm-work. Yet another group stopped working and started to live of old-age or disability pensions or simply never found any job whatsoever (Halamska 2001: 197–199). The contemporary tactics of the ex-employees of state-owned farms from two selected villages will be described in the further part of this paper.

The fieldwork was carried out in 2011. It included staying in the villages and interviewing people following a pre-prepared disposition scenario. Both of the villages are situated in the Polish region of Mazovia. The material analysed in the article consists of around 30 deepened interviews (lasting one to five hours) with the inhabitants of the villages of Grabowo and Wroblewo (both names changed, for the sake of anonymity of the interviewed). The people were different age, randomly chosen. An important element beside the fieldwork itself was the observation – so crucial for an anthropologist. The conclusions, therefore, are limited to the reconstruction of the ‘tactics’ of the inhabitants of two Polish villages with a characteristic history.

³ The state-owned farms (*Państwowe Gospodarstwa Rolne*) and their social and cultural aspects and the ways they functioned are described in detail among others by Zadrożyńska, Psyk-Piotrowska and Szpak (Zadrożyńska 1983; Psyk-Piotrowska 2004; Szpak 2005).

De Certeau's strategies and tactics and the New Cultural History

According to de Certeau, as well as the “New Cultural History”, viewing people as “passive consumers” functioning in public discourse is unjustified. The scholars focus their work on the relationships between the dominating order and the ‘elites’, who support it, as well as the practices of ordinary people who are forced to adopt it. It is well illustrated by the aforementioned division, offered by de Certeau, into the ‘strategies’ and ‘tactics’⁴. The first ones are connected with power and authority, whereas the latter describe the behaviour of the weak; the activities of the people forced to function in the order that has been imposed upon them.

The key idea for de Certeau is the objection to the dogmatic order defined as obvious and generally binding yet, in fact, based on particular interests of the power-holding groups. The scholar follows closely even the smallest activities of the weak, like ‘deceits’ and ‘jokes’, which are intended to mock the dominating system. The appeal of the scholar’s message can be best shown by quoting the original fragment from his work where he talks about the ‘tactics’ chosen by the Indians colonised by Spain: “The cautious yet fundamental inversions brought about by consumption in other societies have long been studied. Thus the spectacular victory of Spanish colonization over the indigenous Indian cultures was diverted from its intended aims by the use made of it: even when they were subjected, indeed even when they accepted their subjection, the Indians often used the laws, practices, and representations that were imposed on them by force or by fascination to ends other than those of their conquerors; they made something else out of them; they subverted them from within – not by rejecting them or by transforming them (though that occurred as well), but by many different ways of using them in the service of rules, customs or convictions foreign to the colonization which they could not escape... They metaphorized the dominant order: they made it function in another register. They remained other within the system which they assimilated and which assimilated them externally. They diverted it without leaving it. Procedures of consumption maintained their difference in the very space that the occupier was organizing” (de Certeau 1988: 31–32).

Parallel mechanism, according to de Certeau, concerns accepting the discourses created by the *elites*. Ordinary people ‘manipulate’ the lawful message in

⁴ The detailed description of the “strategy” and “tactic” can be found in: Certeau M. de (1988), *“Making Do”: Uses and Tactics* in: *The practice of everyday life*, p. 29–39. The notion of tactic and other elements of the conceptions used in the text will not be distinguished in the further part of the article. In every case they should be understood following the definition offered by de Certeau.

such a way that it can be used for the purposes considered by their own environment as the right ones.

This mechanism is perfectly illustrated in the articles by R. Darnton published in *The Great Cat Massacre and Other Episodes in French Cultural History* [*Wielka masakra kotów i inne epizody francuskiej historii kulturowej*] (Darnton 2012). The author reconstructs there the *cosmology* of the inhabitants of 18th century France; how they see the world and the behaviours which reflect such thinking. A strong advantage of Darnton's perspective is the introduction of the clear distinction in the ways the reality is perceived by the French society. Equally important are the cosmologies and practices of the weak who, in diverse ways, try to work over – also in a discursive manner – the painful consciousness of the social position they were in as well as its practical consequences.

In defence against the unjust system they resort to clever symbolic tricks which for them constitute one of the few freedom areas. “For the peasants fables are such freedom spheres because the weak can win there thanks to the only weapon they possess – their own cunning” (*ibidem*: 69). Fables, according to Darnton, were to perform two basic functions in the peasants' lives – on the one hand, they informed them about the basic rules governing reality and, on the other, indicated the ways to *cope* in such reality. The folk fables usually have the nature of *warnings*; they show that the world is cruel and dangerous. Although the people you meet may turn out to be *princes* or *fairy* godmothers, it is highly likely that you will meet a *wolf* or even a witch as well.

A famous example of using the commonly known symbolism to achieve an advantage by the weak is Darnton's *Great Cat Massacre* viewed by its participants as really “amusing”. In an 18th century a printer shop the apprentices, as an act of symbolic rebellion against the master, open a trial of the cats they had caught in the surroundings – including the shop owner's wife's cat. They try and slaughter the animals. This situation, in the light of the contextual explanations offered by Darnton, can be understood as a symbolic “judgement over the master” with the use of a clear symbol; a symbol that is not ostentatious enough to get punished themselves for the deed. *The Great Cat Massacre*, put in a broader social and cultural context, also constitutes a symbolic attack on the dominating social order.

The story described by Darnton clearly shows how skilful the people, labelled as the *subordinated* ones, can become in coping with the dominating order. This thesis contradicts the image that frequently functions in public discourse of the people usually associated with ‘passivity’, ‘subordination’ and ‘resignation’. It can be concluded that, according to Darnton, the people considered as ‘marginalised’ or ‘excluded’ can quite skilfully ‘manipulate the symbols’ in order to achieve an effect that is beneficial to themselves and that includes an intentional humiliation and symbolic defeat of the opponent.

Material analysis – the tactics of the inhabitants of two Polish villages

The choice of the analytical frames is justified by, among others, a fragment of an opinion of a woman living in one of the villages in question. The woman describes her feelings connected with the stigma that is carried even today by the workers of *state farms*: *At that time it was a normal workplace for us, like any other. Yet, always, I don't know – in the past I never observed it – later I always seemed to hear it – it was the last resort, as if all other places had been good and that one bad. Yes, it was like that. That's the system we had. That was the workplace. People could get a flat here, it always was kind of attractive in a way, wasn't it? Later, you always heard «...like in a state farm», «...because in the state farm» [...]. Or even now you can often hear on TV or on the radio «...because it is the old state-farm environment», «an old state-owned farm village». I only wonder when it stops, when they stop talking like that. 'Cause I don't know if it matters, if somebody says «it's an old state-farm village», «it's a state-farm society», as if...'*

What made the unfavourable image of the state-owned farm environment was not only the TV documentaries, or newspaper articles but also the research focusing on the *post-transformation life of the inhabitants of the villages of the post-state farms*⁵. We have to bear in mind that there were many post-state owned farm environments, and that time may have affected these people's situation. It cannot be excluded, however, that there has recently been a change in the rules of correctness accentuated in the domination in the humanities. Inspired by the conceptions of the above mentioned scholars I will try not to concentrate on the dimensions of 'exclusion' or 'marginalization' but on the tactics that – more or less – fit into the logic of the system⁶ in the two selected Polish villages.

The issues are exceedingly complex rendering it virtually impossible to describe all the tactics used by the people. It is, therefore, absolutely essential that we create a set of tactics and put them into three age-group categories – the elderly, the mature (productive age) and the youth. The analyses will be carried out basing on the materials gathered in two villages of Mazovia – Grabowo and Wroblewo (the names of the villages are changed), though most of them come from the first village. The commune (Polish: *gmina*) is situated to the north-east of the Ciechanow county (Polish: *powiat*). One of the villages in question – Grabowo – is a local administration and service sector centre. Both villages lie a few kilometres away from Ciechanow and about 100 kilometres from Warsaw. The characteristic feature of the district is that there is no industry. It is an agriculture district – the

⁵ NB. among others Palska (1998), Tarkowska (1998), Tarkowska (2002), Karwacki (2006).

⁶ The nature of contemporary culture, its characteristics that I mean, are well reflected in the works by Sandel, Sennett and Środa (Sandel 2012; Sennett 2006, 2010; Środa 2003).

arable land constitutes 90% of its area and around 70% of its inhabitants earn their living in agriculture. The districts' population is about 6,000. The inhabitants have low level of education; only a small percentage hold a university degree; 40% are people with primary education.

The tactics of the elderly: immersing in everyday life and reflectivity

The age categories referred to are purely subjective – ‘the elderly category’ includes the people who receive old-age pensions which, in turn, largely influences their behaviour. The people referred to as ‘mature’ do not receive such benefits. This means that they have to cope with the contemporary world in a different way – these people are around 35–60 years of age. I will start my analysis with them.

The elderly people's tactics observable in Grabowo can be divided into two main categories – those who have achieved their life stability and now reflect on the situation and those who are trying to follow the current events and thus form their viewpoints. The first category will include the inhabitants of the estate (Polish: *osiedle*) who earlier worked in the state farm and soon after the farm close-down gained a financial security guaranteed by the old-age or disability pensions obtained from the state. These people usually function in a stable way, enjoy the sense of security and tend to focus on the contacts with their neighbours or family as well as on looking after their grandchildren. The past plays an important role in their lives and is perceived as a kind of Arcadia. The ways of coping with the world are largely reminiscent of the tactics of the people living in a similar situation in a manor or a state-owned farm; the only difference is that they colour up their everyday existence by frequently watching TV, particularly soap operas. Life, in their case, passes slowly and monotonously; and is only occasionally interrupted by some arguments with the family or neighbours. In fact, this kind of tactics is not new; they fit perfectly well into the well-known picture of rural life. From time to time a scandal occurs, for example informing the police about one or another neighbor. Such situations, nonetheless, have a short life so that soon everything returns to normal. Everyday life with family, neighbours and a small garden make up the basic activities of a large share of the Grabowo population.

There are also people in the estate who dramatically differ in their thinking and reflectivity. These are the people who would manage well both in the state-farm period and the ‘post-transformation’ reality. It can be well observed from the declarations on their salaries; in the new system treble that of the state-farm ones. These are not the people who have reasons to complain about contemporary life just because they are the victims of the system changes. On the contrary, the changes have elevated their material status. However, they do not see today's life

as ‘an Arcadia’. The type of practices prevalent among the elderly people may be called an adaptation to new conditions; it is a kind of ‘writing into’ the new order yet, at the same time, viewed in a strongly negative way. The unfavourable perception of today is, however, well-grounded. The greatest contemporary scourges, according to these people, include the atomization of the society, insecurity, treating employees like *slaves*; insufficient courage to express one’s own opinions or *stealing* from the state under the veil of making positive changes. Furthermore, *stealing* the state property which is allegedly done by the people from the Agricultural Property Agency (Polish: Agencja Rolna Skarbu Państwa) together with hyping modern investments (for example a newly built road) and downplaying the achievements of the previous system, for example rebuilding the country after the war. What is more, they complain about the deterioration of psychic condition of the people (proven by suicide statistics); *looking after your own business* within an institutional framework under the veil of common cause as well as *fooling* people by offering them TV entertainment on the one hand and neglecting *high culture* on the other. All that makes a pessimistic picture of contemporary life. One of the interviewed men says: *go forward, jostle and aim for things at any cost. You should not teach such things to children, no. You have to work, you have to learn and be good at what you do – not at any cost. But that is what reality is like – you have to steal, cheat and be ruthless.*

The man is knowledgeable about the contemporary problems; he can easily use the Internet, mainly to compare news offered by different portals and various computer programmes, e.g. Photo shop. All the technological novelties and gadgets, absent in Poland in the past, do not change the ever-present conviction in his speech – that despite all the grand tragedies and dramas in the past, life was less dangerous than nowadays. This is, mainly, due to the fact that in the past people would be interested in the world that surrounded them, they discussed and thought of what was important for the whole society; whereas now, everyone cares just for themselves.

A very similar thought has recently appeared in an interview with a historian, a man involved in the system transformation in Poland, K. Modzelewski, according to whom: “People think today that the world is imperfect and nothing can be done about it. Instead of fighting together with the injustice, they try to adjust individually. Even the political left does not believe that the world can be changed. It is a result of being overwhelmed by some conservatism and the conformity to the neo-liberal economic doctrine that pretends to be a mathematic law. We have collectively accepted the market rule. Well, since it is inevitable, what can we do – flog the dead horse?” (Modzelewski 2013: 14)⁷. The biggest drawback of

⁷ A detailed description of the Modzelewski’s views can be found in the recently published book entitled *Zajeżdżimy kobyłę historii. Wyznania poobijanego jeźdźca* (Modzelewski 2013).

contemporary times is that people do not talk to one another, are not interested in what is going on because, in the common opinion, there are “inevitable” laws of history at play and nothing “can be done” about it; the only way is but to accept it. However, the contemporary order is only one of many different orders, and the key role is played not by the commonwealth but individual ways of surviving.

The vision of the world described above together with the tactics inevitably bring to mind the case of the Indians quoted by de Certeau. On the surface they accept the rules that are imposed upon them, which does not mean that they internalize them. Just the reverse; they cleverly use them for their ends having a firm conviction that they ought not to be taken seriously. As de Certeau claims, “people are not stupid”, and however negative the general view of the former state-farm workers might seem, the material gathered does not corroborate it. The people “cut themselves emotionally off” the mainstream, keep distance to it and, what is more, they do it deliberately. Their attitude is a privilege of the chosen ones, those who were lucky, or unlucky enough, to get to know different world orders. It is usually conducive to creating a sensitivity that enables them to get to know the assumptions hidden in every ideological message – the assumptions which are commonly presented as obvious, imminent and unchangeable.

To sum up, it can be stated that the elderly people living in Grabowo, even though well-adapted to contemporary reality and understanding its mechanisms, do not accept or support them.

The tactics of mature people: withdrawal, adaptation, traditional farming, using state benefits

The part of the population of Grabowo, who can be categorized as mature people, since closing down the state farm have tried to cope with the new reality in many different ways. The moment of the collapse of the farm is well-remembered by everyone as humiliating and traumatic: *I still remember the view; those men standing as if in real. Well, some kind of “selection”, I said it was a “selection” taking over those workers; they dealt with it in a disgusting way, it was so humiliating that.... I don't know.* This sad and unpleasant event left a lasting mark in the people's lives.

Despite the initial difficulties, the inhabitants of Grabowo tried to cope with the new reality in many different ways. It was easiest for the people with university degrees, those in managerial positions since they were the first to find jobs, for example in the local schools as teachers, the self-employed or in nearby towns, like Ciechanow or Warsaw. The remaining state farm ex-workers started to receive pre-retirement benefits, after that early-retirement benefits often thanks to a legal clause of working in difficult conditions. For many of them the pension

is the main source of income, yet it is not always the case. The people who are still working and functioning on the labour market refer to contemporary reality in a few different ways ‘withdrawal’, ‘adaptation’, ‘traditional farming’, as well as ‘using state benefits’.

Withdrawal

The first kind of tactics is represented by a woman whose ancestors had worked in the manor before the state farm was founded. The tactic is an attempt at carving out a ‘niche’ an own closed space in the external world seen as hostile, expansive, invasive and incomprehensible. It could be inferred from, for example, the following statement: *Maybe, maybe it has limited me, the fact that I got rooted here. Perhaps if I were to have been elsewhere in a city, or move somewhere, I would have had to fight, to find a place for myself and yeah, earn my living, maybe I would develop... Because I am, I can find lots of energy when necessary, and here it seems to me that I got closed up here in a sort of, around me, such a – sort of nest, and I am sitting here and I am scared that someone may destroy it and I again will have no opportunities... It may have dragged me down, on the one hand.*

The woman who expressed the opinion has always had difficulties with adapting to the life in changing conditions. The negative consequences of the choices she had made result from the fact that she decided to drop out from her studies and come back to her home village of Grabowo. Also, her personal life that she chose at that time turned out to be a failure – she was subjected to home violence and she was the first woman in the village to get divorced. This has had an impact on her relationships with the locals. Nowadays, the difficulties with adaptation occur at her work in the museum, especially after the new boss had taken over.

The tactics of survival in contemporary reality in this case rely on building a ‘niche’ for oneself; one that is clearly detached from the outside world and where one can introduce their own consciously chosen – not imposed – order. The tactics of this kind rely on detaching yourself from the outside world which you do not accept. This can, sometimes, be perceived as a mere passivity, a legacy of the ‘hopeless proletarian person incapacitated by the master’.

Adaptation

The second type of tactics among the mature community of Grabowo consists in desperate attempts at adjusting to the ‘market’ rules of the new reality. The people try to lie in accordance to the recommendations propagated in public discourse

which is supposed to bring them life success. One can include here, among others, mobility, active job search not only in the vicinity but also further away, getting a university degree, the knowledge of foreign languages, a peculiar assertiveness and independence. Superimposing these values onto the vision of the world that is shaped by the 'manor', then 'state farm' and the systems of meanings, results in a vision of the world that is internally 'torn apart'; a vision comprising sometimes contradictory values. On the one hand people declare that family or community is the most important; they complain about the loosening or deteriorating of interpersonal relations, on the other hand, however, they complain about the ever-present gossip and constant vigilance. They dream of leaving Grabowo for another, more anonymous place.

The tension can be observed in the tactics of the people on many levels – the relationships within family, with friends, neighbours and work colleagues. Within family relationships there is a far-fledged practicality and tight control which can be illustrated by a statement of one woman: *My marriage was one of convenience, less of love, 'cause love is... I was a bit calculating when I decided to get married, I was more after personality, what a person is like, whether one is wise enough in my opinion to talk to him, to get my message across, to decide together, 'cause life is not just dating or holdin' one another's hand, isn't it? Later, there is a load of things to sort out that earlier were seen to and now you have to do it on your own. So that is why I was guided not only by love. Love was something extra – yeah, one could love that man – that's how I would put it, something like that. Not that just love and I am not interested in anything else, no.* In a good relationship, as it turns out, one needs not only common sense but also a large dose of mutual control; you have to constantly control the situation which translates into some particular tactics in your personal life.

Similarly to personal life, control and discipline are needed also in the life of the estate's inhabitants. The community of Grabowo negatively view the attitudes of those who drink alcohol in front of the local shop as well as those who permanently use the benefits from the local Social Welfare Office (Polish: Gminny Ośrodek Pomocy Społecznej). It can be observed in the following fragment: *those that hang around the shop, for example, are getting on my nerves. I somehow feel as I were responsible for the village and its image, so I'd like, well, if someone comes here to see it as a neat, friendly place, that there is no rubbish or that the drunkards are not seen outdoors. Well, I don't like it, although...* The blame for drinking alcohol near the local shop is not only on the men who do so but also on their wives who apparently accept it. In Grabowo there is no social acceptance for the people who permanently use social benefits. The villagers raise their reservations at the meetings with the commune authorities and they try to exert influence on the situation. In a community with limited resources people carefully protect common goods and ponder who might and ought to use them as well as who abuses the benefit system simply because they do not want to work.

Many a time can we hear an opinion that, the people hanging around the shop do not want to work legally, so they choose not to work at all. It can be read as a form of resistance to the dishonest practices of employers. It often happens that the employers offer 'irresistible' conditions, namely officially the minimal wage, while 'under the table' they pay them the rest of the salary. It allows to effectively evade the state control and is a frequently used employers' tactic to cope with the system.

From the stories told by the people of Grabowo one can easily see that they use a whole gamut of tactics to cope with reality whether with family, friends or neighbours. Sometimes, however, even hard efforts do not work and, as a result, people painfully get convinced that the 'self-made man for everyone ideal' is just a myth; that it is just an illusion because the ready recipe for success in the real world is deceptive. The people of the villages in question who choose the tactics to adapt to the declared requirements of the system often get bitterly disappointed. It can be well exemplified by a woman who for many years has been trying to make her children leave the home village of Grabowo. Those hard, yet futile, efforts include trying to find a job for one of her daughters and borrowing money in order to buy a flat for her in a nearby town. The flat had, however, to be rented to other people (to save money). As a result, the daughter, together with her husband and children, is still living with the parents in Grabowo. The parents do their best to give the other daughter a proper education so that she could avoid the problems of her sister. She is studying foreign languages now. However, according to the mother, also in this case one cannot be certain that the girl will find a job. It is, therefore, highly probable that, despite being active, i.e. trying to get the knowledge and skills (indispensable) in contemporary world, people cannot fulfil their ambitions often called in the previous system 'social upgrading' (Polish: awans).

The social structure puts a strange resistance, which can also be seen in the large-scale research carried out in Poland. The people who hoped for a change in their life situation and who have taken concrete measures to achieve it, feel embittered, disillusioned and resigned when it turns out that they have failed. They claim to have no power to keep fighting because it is completely pointless. What is left to them, is just living among the people who do not want to change their monotonous, gossip-filled everyday reality.

Although life in Grabowo is not seen today as it used to be, that is a land of plenty, an Arcadia (w 'krainie lat szczęśliwych')⁸, the contact with the outside world is a source of disappointment, too. The villagers surveyed mention the *rules of the jungle* and say that everything is up for sale. The main problem of nowadays

⁸ *Kraina lat szczęśliwych* is a book by Łukasiewicz on the life of the people of Grabowo in 19th and beginning of 20th century.

is that everything can be *put down to money*, it is difficult to find something that does not have its price. This painful lesson is a result of the villagers' experience with the outside, *great world*. This agrees with the conclusions of some eminent philosophers, including M. Sandel, who described it in his work entitled *Czego nie można kupić za pieniądze: moralne granice rynku* [*What money can't buy. The moral limits of markets*] (Sandel 2012).

Traditional farming

So far, our conclusions have concerned the life of the village of Grabowo. However, the research was carried out in yet another village, Wroblewo, where reality was quite different. People lived, looked, talked and behaved differently here. Also, they differently coped with the world. The so-far description of the tactics used by the inhabitants of Grabowo will be complemented with the knowledge about a nearby village that has had a similar history yet, due to the fact that it is much smaller and has never been a local administration centre, it has changed differently. The village has now a farm following very old rules and is run by a private owner living in Warsaw.

After the collapse of the state-farm the people living in Wroblewo felt hurt and cheated. They tried to use all ways possible to find support. The ways included writing letters of complaint addressed to the Party (Communist party). Nowadays there is nobody to turn to if you need help: *You know, madam, I get the benefit, but you know it's such little help that..., I get forty or fifty zloty so it doesn't count. This help is almost nothing... In the past, when there was the party...; so if you went to Ciechanow, talked to them, you could get some help. And today... I went and talked today to the borough leader (Polish: wójt): if there were the Party I would know how to help – he told me. Now he himself has nowhere to turn to. It's as simple as that.* The local authorities in the villagers' opinions cannot offer help as effectively as in the past. There were institutional forms, within which the people could voice their complaints and expectations. One could turn to the Party, whereas now there is no one to go to. The situation described here is in stark contrast to the conclusions of the researchers dealing with the ubiquitous sense of threat and fear in Communist Poland. It can be seen that the inhabitants of Wroblewo not only had no fear of the Party but treated it as a kind of providence, that made sure that no harm was done to them. If problems occurred, the state-farm worker could readily report it to the authorities and they tried to help. This vision seems today downright unbelievable yet, perhaps, partly explains why many people in Poland are missing the past.

The inhabitants of Wroblewo are convinced that nowadays politicians *cheat* people, that they give promises but never keep them. What adds insult to injury,

is the fact that you can *buy* votes. In response to an innocent question if one of the women living in Wroblewo voted in election, the following discussion started between her and another local man: [*Do you vote in election?*] [*Ms. S.*]: *Very much so. [„Man”]: So what, they come to give each of you thirty zloty and show who you should vote for. [Ms. S.]: No, I myself go voting, I go to X (name of the place)... I voted to choose the borough leader, you know and the leader cheated us too. There was a meeting in the dairy; they brought lots of vodka, ham and appetizers. [Man]: That is how the election.... [Ms. S.]: Yeah.*

That shows what contemporary ‘local democracy’ looks like; apparently ‘close’ to the people. Because it is known that one cannot turn to *the Party* anymore, and that you cannot *count* on the contemporary authority, the inhabitants of the village are left with one of the options: working for a new owner of the old state-farm, getting benefits from the Social Welfare, or working in other towns or villages.

The first of the ways means working for a man who bought out the land and buildings that used to belong to the state farm and now runs his own farm employing a female worker living in this village (who once worked in the state farm). Asked what she did for a living she answered: *Well, what can I do here. Well, I, you know, I work “privately”, you could say – not legally, no nothing. But it is my job, I mean I look after pigs, there are a few, there are sows, piglet are there; new ones are born. But you know, I get some log wood, a pig from time to time, sometimes he pays my electricity bill; here, look Wiesiek also paid me all the summer. It’s an electricity bill... that’s how you live. Be it some carrot, or potatoes. „Cause you know, this boss of ours...; he runs such things. You know, you don’t buy potatoes, you don’t buy carrot, onion you don’t buy... Meat – from time to time a pig is killed so be it. A bill is paid. And some money. So where should I go then?*

The new owner’s farm follows traditional rules that immediately bring to mind pre-industrial economy and the old manor order. The work is not documented; it is based on an oral agreement between the owner and the people who work for him. One of the women workers living in Wroblewo earns PLN 800 but she gets extra her bills paid and a range of payment in kind, including coal, vegetables or meat. Then, there is some money you can get extra, when her son goes to a holiday camp (PLN 400) or when the animals are *well tended*. The main problem, however is the lack of registration, i.e. making the employment legal, since the woman needs for years of documented working period to get her retirement benefit. That is why she tried to get a legal job. She eventually found it, thanks to the local Job Office. It was cleaning the station in Cechanow. The woman, however, never started the job because she had no money to buy the monthly travel card to get to the town – the ticket cost around PLN 250 at that time. She also stopped going to the Job Office to sign the necessary documents. As a result she has no social insurance. That is mainly why working for the local owner is so important

to her. Besides, the woman likes her job and is ready to do it whether she gets paid or not. When asked if she would like to do something else, she said: *I would prefer working on a farm and... that is why..., as I go there with pleasure. It is not that I go there because I „have to”. When he doesn't pay me this week or for two weeks, I don't go for a day or two or whatever; I don't go until he comes and pays. But I go with pleasure. When the right time comes, he will find the money and will pay me. I am not like that...*

The material gathered in Wroblewo allows us to draw a few conclusions about the tactics of the villagers. First of all, the work is very traditional and is based on an informal agreement between the employer and the employee. The remuneration, often long overdue, is paid out in two ways: in money or in kind. An important element of the loyalty towards the employer results not only from the ethical norms but also from a simple calculation that any form of *cheating doesn't work*. This also shows that there is no tacit approval in the village for peddling the stolen goods. Such deeds immediately become commonly known. Probably out of pure spite the local farmers will immediately make the information public. The old institution of denunciation is at play, and that constitutes an effective way of exercising social control.

The interviews also offer an invaluable knowledge about how the traditional farm is managed, namely by carrot and stick (rewarding and punishing). Punishments, as one of the interviewees implies are traditional that is 'corporal', whereas the rewards are various 'goods' like extra money, or a pig for Christmas. Possibly, one of the tactics of the inhabitants of Wroblewo is working out some skilful ways of dealing with the employer by weighing up what may *pay* and what should rather be avoided. It is no good cheating, whereas good honest work will usually be appreciated. Such a situation clearly shows that there exist the forms of living out of any control – whether by the 'market' or 'the state'. In difficult situations people themselves, that is without any institutional forms, work out the rules of regulation that they later observe.

Another way to survive or improve their material situation that the people of Wroblewo use is gathering the 'goods' offered by the forest. This phenomenon is not new, either. Rakowski described it in his work *Łowcy, zbieracze, praktycy niemocy: etnografia człowieka zdegradowanego* (Rakowski 2009). It turns out that gathering brings the villagers relatively considerable profits. The inhabitants of Wroblewo also benefit from the Social Welfare. Some of them manage to find a job away from the village; people work in chicken farms in the Białystok area, they lay sett stone or clear snow off roofs in Warsaw. Very often fathers take their sons to work alongside. The tactics also include finding ways to survive without a job. Sometimes, as it turns out, people can rely on their family.

It is undeniable that Wroblewo constitutes an interesting, and somewhat odd, micro-world governed by its own rules. One, where different orders (the one of the 'manor', 'state-farm' and 'modern') co-exist. They comprise the 'pre-indus-

trial economy working system' like in the manor; state-care, the Party and fixing problems - like in state farm period, as well as 'running after money' which appears necessary to survive in contemporary world. One can also leave it to a chance or a blind fortune and simply buy a lottery ticket that offers a hope for a better life. That is what a woman, living in a small Mazovian village, has been doing for some time. She apparently hopes that one day a miracle will happen and her life will change.

Using the state aid

In Grabowo and its surroundings, like in many other places in Poland, there is a group of people, who do not work – for different reasons. There are people who do not want to work illegally, some do not accept a job for PLN 1500 a month, because they think it is too little. Not only the inhabitants of Grabowo but also those living in other nearby villages realize it very well. They emphasize that in the past people would want to work but today they do not. The interviewees stress that there is something in contemporary reality that does not encourage people from the lower layers of society to be more active. In the previous system, all the people not only had to, but also wanted to work which, as we can conclude, was not solely because of the legal regulations *ordering people to have a job* but also because of the different atmosphere in the Polish countryside. In the past a village *bustled with life* and now it is *ghostlike*.

The inhabitants of Grabowo and Wroblewo admit that they see a lot of people around who could easily earn a living but who simply do not want to do so. The main reason behind it is the change connected with a different way of remunerating people. In the past – both in the manor and in the state-farm – people did not earn a lot, yet they would receive part of their wages in kind (Polish: *deputat*); many useful goods, necessary for life; they also had their rent paid. It is, therefore, probable that the problems with money-spending diagnosed by social workers, are rooted in this very mechanism – the model of 'pre-industrial economy' that descends from one generation to another. The benefits or low salaries that the people receive are spent on the goods seen by others as simply unnecessary. They include *plants, photo frames, elephant figurines, sheer curtains, serviettes* as well as kitchen staff, like *spoons, little pots or plates* – all in excess. The phenomenon of buying *trifles* observed by social workers can, of course, be explained by the contemporary tendency of 'consumptionism' and a love for shopping. In many cases such an interpretation can be relevant. However, in the context of the village researched, there is plenty of evidence to the contrary. The love of 'baubles' among the people of Grabowo and the nearby villages is nothing new. It is deceptively similar to the stories of the women enthralled by

the ‘pins’ and ‘baubles’ brought to the manor by Jews in the past. That culture could not be labelled as a ‘consumptionist’ one. Perhaps, the phenomenon can be explained by the desire for a touch of luxury; some acting and thinking which can help us take your minds off the drab, mundane everyday reality filled with determinisms and necessities – as P. Bourdieu put it. Bourdieu claims that people with the *folk background* are frequently left with only the choice of “necessities” and, like a *magnetized* “needle” they instinctively and unconsciously turn towards what “is for them”. It may then turn out that the irrational or reckless behaviour of many ‘poor’ and ‘weak’ people – usually read as the symptom of thoughtless wastefulness and recklessness – can be interpreted as the need to ‘get away’ or ‘escape’ from the systemic limitations; as a kind of poor substitute for ‘luxury’. And, at the same time, as one of many, perhaps unconscious tactics allowing them to survive in the overwhelming reality.

In Grabowo as well as in the neighbouring places one can meet the people who can, quite effectively, get public money. Their attitudes do not, however, find approval on the part of other members of the community who, on many occasions, openly admit that they do not like scroungers, slobs and studs (Polish: *darmozjady*, *nieroby* and *dziecioroby*). The tactics relying on using systematic benefits have their limitations. The workers of the institutions distributing them as well as the inhabitants of the village themselves – tired from work – make hard efforts to eliminate or, at least, to limit such unwelcome practices. The inhabitants of Grabowo feel the need to tighten the distribution of public resources to which, in their opinion, they themselves contribute.

Young people: in search of ‘better’ future

The lives of young inhabitants of Grabowo form a few characteristic patterns. Some young people, after graduating from junior high school, (Polish: *gimnazjum*) do not continue their education which is caused, among others, by their material situation. They simply cannot afford to cover the commuting costs and cannot count on their parents’ support. These young people usually look for some short-term part-time jobs, for example working on construction sites, removing snow from roads and roofs or fruit-picking. It is a tactic that is imposed by structural determinisms and consists in living from one day to another, with no plans for future. Putting plans into effect might take too much time turn out impossible. The young people leading such lives do not write in the mainstream at all; they live on its margins filling in the social and cultural gaps. For the inhabitants of Grabowo it is fairly obvious that the life of young people is largely dependent on their parents’ support – both financial as well as emotional. Quite often, however, young people who try to improve their situation by finding a job or getting edu-

cation not only cannot expect support from their parents' but they even get discouraged. Other people born in Grabowo choose the tactics which rely on getting a university education, finding a job somewhere nearby, and settling down in the area, yet not in the estate where they were brought up. A strong control exercised by the community, especially by its older female part, is a sufficient reason to look for one's place away from Grabowo.

The village is also inhabited by the young people who decided to settle down in the estate which was once built for the state-owned farm workers. They treat it, nonetheless, as a temporary situation and as soon as an opportunity emerges they plan to move out and live in another nearby village or town. There are many flats for sale in the estate. One of the reasons, apart from numerous neighbourly conflicts and lack of privacy, is the difficulty with taking children to school or extra-curricular classes in the nearby town. The young people who decide to stay and in Grabowo often live in difficult conditions and, practically, cannot cope without their parents' help. The situation becomes even harder when their children are born. Then – as one of the interviewed men said – *everything is subordinated to money*. Both the older and younger inhabitants of Grabowo agree that in the past life was easier, that *it used to be better*.

Another category are the people who decided to resort to the tactic of symbolic 'escape', made an attempt at cutting off the roots, separating from the neighbours and the too 'stuffy' atmosphere or 'mundane' everyday humdrum. It can be stated that the difficulties these people face and the solutions they choose are quite universal and have already been well researched for example by Chałasiński (1938, 1964) in Poland as well as more contemporarily by Bourdieu (2005, 2006, 2007, 2008, 2009). The choice of the 'social advance', transgressing the structural conditioning, inevitably leads to a sort of dilemma which was called by Bourdieu 'habitus split'? This phenomenon can be observed in the opinions of the young people from Grabowo who have already had a chance to know the world: *I think there are no opportunities for young people in here. You just have to get away from here, to start something new. Like me, I just moved to Siedlce, 'cause I saw my passion there – languages – it is something I like; so I just left. I come here as often as I can and I am happy that I can spend some time with my family. You now, life is... But passion and achieving your goal is number one for me*. The content functioning within the mainstream – as the scholars in *Cultural History* point, including Ginzburg or Chartier (Ginzburg 1989; Chartier 1993) – is not in vain, but overlaps with the knowledge acquired within the primary socialisation. The functioning of this system can be also observed in the attitudes of the young people from Grabowo. Although they painfully feel the limitations resulting from living in a small, hermetic community, they have no knowledge that would support their practical sense and that would allow them to function well in a more anonymous, fraught with danger world of the city. The material gathered shows that the people brought

up in small and relatively closed environments have major difficulties adapting to life in the places organized in a different way. Even a superficial contact with a city causes fear, sense of threat or helplessness. Not everyone realises that the sense of getting lost at the Central Railway Station in Warsaw may be a sufficient reason to make a decision to study in a different city or to quit the idea of studying whatsoever. Apparently unimportant events and situations may have an essential influence on people's choices. There is no doubt at all that the life of the people coming from small places is not easy and that it entails huge costs; material and – first of all – mental. Not everyone is capable of bearing them. If moving around the station is a problem, then obviously it may be difficult to cope in the sphere of interpersonal relations in the environment of the people who often have much bigger 'capital' of all kind – *financial, cultural, social* or 'symbolic'. Sometimes, an ordinary and seemingly innocent look from the colleagues may make the person realise the painful truth about the social 'distinction' and difference between people.

In the statements for the young people, also in the one quoted above, there is perceptible a kind of rip involving the attachment to the family, the sense of security in a local group and strong, limiting and irritating control. This phenomenon may be interpreted as a tension between two different orders of thought – the 'traditional' and the nowadays popular 'individualistic' one. The speaker (woman) was brought up in a relatively closed environment, where one could observe specific ways of thinking connected with a particular lifestyle. Leaving the 'locality' is connected with huge emotional costs which translate into a sense of fear, uncertainty and helplessness. Apart from the influences of the local environment the thinking of the people is also affected by the messages of the mainstream which promote 'being active', 'freedom' and 'self-fulfilment'. Much of the disappointment at not accomplishing the passions, as the woman from Grabowo claims, is the result of the thinking that *passions* should be crucial in the life of a modern emancipated person. A large part is also played by the liberation content in the public discourse which remains in opposition to the inhibitions imposed by the local environment that constantly exercises control over its members. This control, deemed in the past as an obvious element of life in a small group, today – perceived from a new individualistic perspective – is becoming particularly severe and makes all the advantages of living in a world that was once close, safe and familiar appear meaningless. People who left the village some time ago see this world with a kind of distance which allows them to see clearly not only its bright but also dark sides. This view is therefore tainted by the perspective of an 'alien', 'citizen of the great world' (Waldenfels 2002). Thus the sense of strangeness starts to accompany the young people of Grabowo not only in the outside world but also in the so far their own 'locality'. This 'locality' perceived from a new perspective slowly becomes less attractive, too monotonous and irritating because of its excessive literality.

Recapitulation

It has to be stressed that the article presents a study of two selected Polish villages, therefore the final conclusions are limited just to them. It cannot be excluded, however, that other inhabitants of Polish villages use similar tactics. Despite many difficulties the inhabitants of Grabowo and Wroblewo try, in many ways, to cope with the changing reality. Their tactics can be divided into three main groups. The first one includes desperate attempts at *adapting*, writing into the order predominant at a particular time. The second involves *resisting* this order, whereas the third one is an unclear form of staying in limbo, in the space between conforming and resisting. The tactics the people use can be analysed with reference to two different systems – local and non-local. It is only one of the ways of attempting to categorise the tactics of the villages in question following the selected classification.

The tactics used by most elderly people are living in accordance with the local order and opposing the ‘individualistic’ non-local one. Young people, in turn, who have contacted the outside world, with some quandaries, dissociate themselves from the traditional values of the group accepting what is connected with the ‘city’ or the ‘world’. These are the tactics of the middle-aged people once working in the state-owned farms, also of their children some of whom leave to study in another town and of some new arrivals in the village. Despite a large number of people who have started to identify themselves with the *mainstream* there are people in Grabowo who, for different reasons, cannot or do not want to accept and implement the ‘individualistic’ patterns. This category includes the elderly inhabitants of the village who defend the old ‘good’ world, the young people who cannot or do not want to leave in order to seek their fortune in a city. It also includes, the benefit-takers from the welfare system, shameless enough to have learnt to use the rules of the present system for their particular ends and ignoring the fact of being unable to live in accordance with the ‘individualistic’ patterns. Furthermore, there are also the jobless who do not want to work illegally and – as they say – prefer spending their time hanging around the local shop and drinking beer. It turns out, that on the outskirts of the contemporary order there is a significant number of people belonging to different categories.

From de Certeau’s point of view the most interesting are the attitudes of the people who ‘flirt’ both with the local and non-local order. The practices of these people, however well suited to contemporary conditions, are not in accordance with the ways of people’s thinking. In their views, the characteristics of individualistic culture are unambiguously negative. Such kinds of tactics can be observed among the higher position ex-workers of the state farm who approach reality in a reflective way. Although, they cope quite well in the contemporary world, they are not enthusiastic about it. These tactics mainly include

the conscious and reflective living, whose important part is ‘reading’ the rules hidden under the surface of the social life and using them to achieve their own, mainly material, ends. Such an ambivalent approach, in which the thinking and practices are carefully separated from one another, allows a ‘tactical’ behaviour, which relies on harmonious co-existence of the conviction that the contemporary world is not good, and involves acting so that you can use the existing system to achieve your own goals. The attitude that comprises such tactics is far from a real involvement, from internalising the values and assumptions of the mainstream. It is a kind of ‘play on the system’, ‘pretending’ that you accept the existing order when, in fact, you do not.

The most general conclusions from the so-far considerations let us determine the conditions which need to be fulfilled by a person included in the category of ‘the weak’ to cope in the contemporary world. First of all, one has to know the real, not the declared, rules of the system. The messages functioning in the public circulation, Barthes’ *myths*, not always contain the truth about how to be successful. Most often, they are targeted at the people who might believe in them, that is at the people who are least reflective and have the weakest skills of observing and following what is happening around them. Once you manage to learn something about the world, you transcend the clichés; it is good to get some distance to the world and look at everything from the point of view of an ‘external observer’. Then, you have to find a space for yourself; a space where you can learn to use the systemic conditioning for your own purposes. At the same time you have to observe the most important rule – do not get involved, do not allow a situation in which you take seriously the judgement offered by the system, including – above all – one concerning yourself. If that happens and somebody becomes ashamed of their difficult situation (of being a ‘loser’), they are not able to use any tactics at all. Then, one becomes too ‘vulnerable’ to muster any activity and, like the inhabitants of Grabowo ‘aspiring’ to live in the ‘city’, they will conclude that they *have no strength* to try anymore. The basic rule of successful tactics is that you cannot get involved, as this involvement, sooner or later, will turn into disillusionment and apathy. The last rule is: with all the complications that life offers, especially the life of the weak, you must have an idea for yourself and try to carry it out, despite any adversities. It is worth stressing that it must be your ‘own’ idea. Paradoxically, ‘the culture of individualism’ makes people conform. To fulfil the *canon* of values they must not only subject themselves to the external control, but also to the oppressive self-control which, as Elias said (Elias 2011: 508), does not have good effects for human “psyche”. Furthermore, it is easy to see that the most effective tactics – in de Certeau’s view – involve playing on the system; seemingly “being on good terms with the system” but, in fact, outsmarting it. This was the way the Indians, referred to in the Introduction, acted; they could use the mainstream messages for their own purposes.

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Sylwia Michalska, PhD

Institute of Rural and Agricultural Development
Polish Academy of Sciences

EVOLUTION OF THE SOCIAL ROLES OF RURAL WOMEN IN POLAND: FACILITATING AND CONSTRAINING FACTORS

Introduction

The term “role” borrowed from the field of drama, is the key term of various theoretical perspectives. Although it may refer to the macro level of sociological analysis, its most common use is that of micro level. For a long time, women did not have much influence on how to perform a role assigned to them. The scenarios of the role were not flexible, the rules were set by outside authorities, and the way the roles were performed was a matter of social control. In many studies on the social situation of women, the main focus is put on gender inequality and inferior status of women, visible in almost every culture. According to Giddens (2004), in almost every society the male social roles are considered more valuable than the female ones, and the awards for good performance are also higher. It turns out that those inequalities are a consequence of the fact that the responsibility for the housework and raising the children rests almost exclusively with women. Female social roles are considered by the members of the society to be different from the male ones, and women are exposed to a more severe social control regarding the way they perform their roles. The patterns of social roles change with time, depending also on the value system currently in force, the age when the women happen to live, dominating religion, political system and particular local conditions (cf. Kotlarska-Michalska 2011). Evolution of social roles is a slow, lengthy process, which sometimes can be accelerated by some events, resulting in changes of social order. There were many such changes in 20th century Poland, and there were many economic, social, and cultural factors affecting the social position and status of the women. In this context, I will focus mainly on the changes regarding family, professional, and social roles of the rural women.

In 1918, Poland regained independence after 123-year period of Partitions. On establishing the Polish country anew, it was decided that, in the legal system

of the new state, the rights of women have to be equal to those of men¹. However, despite the fact that it was a time of equal rights, the opportunities provided by the society were not necessarily so equal. The differences in this area were particularly visible in rural communities, being quite a big part of Polish society: even in 1931, 23 million of people, that is 70% of the whole population of the Second Polish Republic, were living in villages (among them 11,860,000 women) (cf. Mędrzecki 2000). Another important event which accelerated the evolution of female roles was the Second World War with all the political consequences of Poland becoming one of the countries under the political influence of USSR.

The 60s provided another breakthrough, starting the process of profound social changes in the western countries. In sociology, those changes were described with the use of various terms: “post-industrial society” (Bell 1994), “information age” (Toffler 1998), “late modernity” (Giddens 2004), or “postmodernity” (Bauman, 2000). The changes took place in many different fields simultaneously – technological, social, economic and cultural. The most important processes that are indicated to take place at the time, are individualization, emancipation, liberalization and social differentiation, phenomena that have not lead to peace and self-realisation of the individual, but resulted in chaos, unpredictability and growing uncertainty (cf. Kudlińska 2011). The above processes were delayed in Poland, hence the time of acceleration began with the transformation of 1989. The last 25 years was for a Poland a time of profound social, economic and cultural changes. Those events have also had a great impact in the changes in defining and performing social roles by the rural women.

The main goal of this chapter is to show the changes of the roles performed by the rural women living in Poland. An attempt will also be made to answer the question about the factors facilitating and constraining the undertaking of new tasks and changing the way the traditional social roles are performed. Analysis of the changes of female roles will be performed on the basis of literature, personal documents (women’s diaries and memoirs, acquired as a result of various competitions organized in Poland to gather such materials since the Interwar period), as well as results of various, recent and past, research projects on the activity of the women in different areas of life. The analysis of the changes of roles performed by rural women in Poland makes it possible to observe the changes that have taken place in the village communities. Women, being a half of the residents

¹ In Poland, women gained voting rights after regaining the independence in 1918, i.e. on the 28th of November 1918, by the Decree of Józef Piłsudski, the Provisional Chief of State. According to the Decree of the Chief of State regarding law governing the elections to the Legislative Sejm (lower chamber of Parliament in Poland), “Every citizen of Poland, regardless of the sex, has the right to vote in the Sejm elections” and “All citizens that have the right to be elected, can be elected to the Sejm, regardless of sex”; this decision remained in force according to the March Constitution of Poland of 1921.

of rural areas², are an important element of the rural communities, and their opportunities, regarding making their own decisions about the kind of performed roles and the way they are performed, are growing. The aspirations, endeavours and values of the women have a real influence on the direction of the development of rural areas in Poland.

Social roles

Social role can be defined as a field of activity specified by the society, as a sequence of behaviours and acts performed by a person having a specific social status (Rybicki 1979: 462). Znaniecki defines social role as “the whole body of responsibilities, the fulfillment of which the social milieu expects from the individual because of the status of this individual” (Znaniecki 2001: 72). An individual is a member of many social groups at the same time, having many different social relations and performing different social roles (*ibidem*: 561). According to Merton, the basic feature of the social structure is the fact that there is not only one, but many social roles related with a particular social status. This structural phenomenon is called a “role set”, which is a set of “dependencies within roles assigned to the individual because of its social status” (Merton 2005: 142–143).

According to Szczepański, the main idea of social role is based on the assumption that every person has a particular position in different social groups and there are some behaviour patterns related with this position. The group expects its members, having specific positions, to act according to this pattern, which identifies proper behaviour. “Social role is a relatively fixed and coherent system of behaviours (actions), which are reactions to the behaviour of other people, formed in more or less clearly established pattern, expected by the group from its members” (Szczepański 1963: 76). Social role is not only a specific pattern describing the sequence of acts performed by an actor playing a role, but it includes also the very acts that form such a pattern. We can therefore assume the possibility of different interpretations of the same role, as well as the fact that the actor can change the role and make it more individual with his or her own individual preferences (Rybicki 1979: 463). The process of performing a role is influenced by a number of different factors: biogenic and psychogenic components of the individual; the personality pattern, specifying the set of ideal features which the individual performing particular role should have; definition of the role in a particular social group; the structure of the group, its cohesion,

² As indicated by the results of the Polish National Census of 2011, there are 15,332,000 people living in rural areas, i.e. 39.8% of the whole society. 50.25% of this group are women.

system of rewards and penalties which the group can impose on its members, as well as the extent to which the individual identifies him-/herself with the group (Szczepański 1963: 77).

When defining social role, Parsons refers to the social structure, based on a set of relatively fixed patterns of relationships between its particular components. What is the distinctive feature of social action is that the majority of social relations do not engage the actor totally, but engage only a part of his or her action – this particular part is called a “role”, which links the actor with the social structure (Parsons 1972: 306). Social roles define interests, norms and values, stimulating but at the same time also constricting the action of the individual.

The analysis of the social role includes two levels: structurally imposed orders of the role, understood as social provisions, demands referring to actions and behaviours of the individual, and personality role definition that denotes those role requirements which have been internalized by the individual. Structurally imposed orders are elements of the social structure, whereas the idea of personality role definition means that the role is a component of the personality of the individual performing this role. Structurally imposed orders consist of two substructures: the substructure of role facilitation which is a set of cultural factors making some specific role orders especially authorized by the structure of the group, and the role dilemmas related with those role orders which result in divergent interpretations due to imprecise formulation or because of their inconsistency with other orders of the role. The personality definition of the role includes two substructures as well – the idea of the role which is a set of those structurally imposed role orders which have been internalized by the individual, and the performance of the role which denotes behaviour of the individual that is determined or conditioned by the idea of the role or by structurally imposed orders of the role (Szmatka 2000: 323).

One of important elements of processes and behaviours related with performing the social role is the ability of an individual to gain autonomy against structures defining such roles and controlling the way they are performed. The level of the actor’s autonomy is considered to be increasing with the complexity of the set of roles performed by the individuals. What seems to be especially interesting is the observation of the changes in the way the roles are defined in periods of rapid changes, and this is exactly what is occurring in rural areas of Poland: we can observe women go beyond their family roles assigned by the tradition and take action in new areas. Moreover, even traditional family roles are performed in a new way, often never seen before and not always accepted.

Multitude of roles performed, membership of a social actor in many different social groups or performing many roles within one group, may result in conflicts caused by different means of evaluating the way the role is performed by different people, based on different reference systems, or by the fact that some roles performed at the same time by the actor clash with each other or even are contradictory to each other. A role conflict occurs when the individual is incapable of performing

at the same time all the roles related with his or her social status or with the multitude of different positions. A real role conflict is a situation when the individual has to take action which is evaluated or regulated differently in different groups of which the individual is a member. In such a situation, the conflict is accompanied by differences among the systems of value and behavioural patterns accepted by these groups (Turowski 2001: 135). The changes in rural economy, social structure and value system of rural areas result in new definitions of traditional women roles and make the new women roles emerge. The women themselves are active participants of this process, often without institutional or social support, deprived of acceptance of friends and family members, which may bring about serious difficulties in coping with demands of different social roles at the same time.

As mentioned above, each social position is related with some rights and responsibilities, which are however not specified or fixed once and for all. Moreover, different groups to which the individual belongs may have different expectations regarding the way in which the role should be performed. The changing circumstances influence changes in the content and form of performed social roles. This undoubtedly is the case of the division of social roles between genders: we can observe a kind of evolution or even revolution of female and male roles. Since the Second World War there have been significant changes in European societies, including also the roles related with gender. However, the second wave of feminism (Gardner 2006), which defined professional and gender roles anew, was not clearly visible in the post-war Poland. Of course, mass movement of women to the labour market has been reported in the roles and professions which had not been available for the women before, but it was a response to the needs of the state and not the will to support personal needs of women. However, after the system transformation, we have been witnessing an increased discussion of a new definition of gender roles. The features of the new social reality, to which Bauman (Bauman 2000) refers to as “liquid reality”, make it difficult to find fixed behaviour patterns, facilitating the performance of unambiguous and safe social roles. Uncertainty, relativism and individualism placing the self-realization and needs of the individual over the common good begins to reach even such traditional communities as the rural ones, changing their norms, expectations, aspirations and behaviour patterns.

According to Sztompka, a society diverse in terms of social status is the area of conflict between different positions (or rather, of conflict between social roles assigned to these positions) (2002: 118). Apart from the conflict between positions (role conflict), which is actually a conflict resulting from incompatibility of expectations related with different positions occupied by one individual at the same time, Sztompka brings our attention to the conflict between different elements of one social status. This type of conflict is based on inconsistencies of expectations of different interaction partners, and anyone who occupies a particular social position is prone to have a set of different interaction partners (2002: 132). In the postmodern world, the tension between the roles is constantly growing – indi-

viduals belong to an increasing number of social groups and their membership is limited by time, financial resources, and by the possibilities of balancing different responsibilities.

The level of identification with a group decreases with the number of groups of which the individual is a member. In the traditional society, the number of groups of which individuals could be members was limited. There were also internalized rules indicating which roles are crucial and which are less important, it was easier to find common norms regarding the proper way of understanding the provisions of the role and the proper way of performing it. In the traditional society, people were feeling safe and being embedded in a larger whole, to the extent which would be difficult to acquire in postmodern society, which on one hand appreciates diversity and individualism, but on the other hand leaves the individual with a multitude of different norms and opinions. Postmodern individual compares himself or herself to others, having a plenty of available choices, but deprived of certainty about which is the right one.

In the traditional societies it was easier for women to find stability and safety because social roles, clearly defined and performed in a proper way, made it possible to acquire and maintain particular social position. However, opportunities to fulfill individual needs, aspirations and life plans were limited; in some cases, it was even impossible to follow them without leaving the group. One change in today's society is that new roles emerge for us to be performed (women are more and more eager to take the roles involving political, social or professional activity). Another is that even the traditional roles are becoming ambiguous: new ways of performing them are emerging, and the way the same person is perceived by members of different social milieus can be completely different (e.g. different ways of performing traditional female roles – maternal, protective, etc.). The results of the research conducted in Poland make it possible to say that the current population of women living in Polish village is taking the chances created by new socio-economic conditions.

We know that the women living in rural areas have to a large extent taken their chances to improve the level of education and they are better educated than men, but it is not reflected by increased opportunities in the job market or any significant increase in the female presence in the public sphere, e.g. in politics. In the subsequent parts of the chapter, we will analyse the way the family, professional and social roles of women living in rural communities have been changing.

Family roles

In a traditional rural family, the process of performing a social role was based on clear and understandable criteria; the personal patterns of a woman (as a daughter, wife and mother) and a man (as a son, husband and father) were clearly defined.

The proper structure of the family was defined as clearly as the roles of man and woman, it was cohesive, and the identification of an individual with the family was complete (cf. Piłat-Borcuch 2013). In traditional rural communities, the roles of the women were clearly related with the sphere of the home, vicinity of the farm, and with family functions, related mostly with the roles of wife, mother and housewife.

Even now, the research indicates that family is the most important area in the life of the Poles (Boguszewski 2013). The above is also visible in the declarations of the female residents of the village, who believe that it is the family that the other areas of life have to be subordinate to. The women say that, among the values that govern their life, the most important are those related with family, including the good of the family, its integrity, maintenance of the loved ones, as well as the emotional ties binding the members of the family³. Despite the fact, that the birth rate is slowly growing, there is still a serious population decline in Poland. For dozens of years we used to believe that Polish rural family is a large one, with many children. However, important changes have taken place there, as described by Jaguś (2002) or Podogrodzka (2011, 2012). Although the birth rate is still growing in the rural areas, the differences between the village and the town in that respect, that used to be profound, are now rather small. The above is indicated by the results of 2013 research, when the birth rate in Poland equalled 9.6‰ (96 births per every 10,000 people), whereas at the beginning of the 90s it was over 140 (and in 1983 – almost 200). The birth rate in the village equalled 10.2‰ in the village and 9.2‰ in the town⁴. The difference between the fertility rate of rural women and fertility rate of the total population of Polish women declined: in 1990, the rate was higher c. 30% higher in case of the former, whereas in 2012 it was only c. 10% higher. As it was in the case of the birth rate, also the total fertility rate decreased in 1990–2003 (from 1,99 to 1,22 among the whole population of Polish women and from 2,68 to 1,42 among rural women). Later, since 2008, the rate indicated an upward tendency (up to 1,31 and 1,53, respectively), and since 2012 the rate decreased again, to 1.30 in the whole population and 1,43 in the village⁵. The rate is now among the lowest both in the European Union and in the whole world⁶. Hence, the number of birth in Poland is not high enough to

³ Cf., among others, *Sytuacja kobiet w rolnictwie i na obszarach wiejskich* report, a scholarly publication issued on the order of the Ministry of Agriculture and Rural Development, consortium including: Konsorcjum Badawcze FOCUS GROUP Albert Terelak and Centrum Rozwoju Społeczno-Gospodarczego Sp. z o.o., 2012.

⁴ *Podstawowe dane demograficzne o dzieciach w Polsce*, GUS Departament Badań Demograficznych i Rynku Pracy, notice for a press conference on 30 May 2014.

⁵ *Raport o stanie wsi. Polska wieś 2014*, FDPA 2014.

⁶ Source: Eurostat, <http://epp.eurostat.ec.europa.eu/tgm/table.do?tab=table&init=1&language=en&pcode=tsdde220&plugin=0> Within the European Union, as in 2011, the two countries with fertility rates lower than Poland were Hungary (1.23) and Romania (1.25).

sustain population levels⁷. We can assume that currently some processes of cultural change take place in the rural areas, which result in the decreasing difference between the village and the town with regard to parenthood planning.

The role of the mother in traditional peasant communities was always subordinate to the interests of household and family. Memories regarding pregnancy and the period of early motherhood were compiled in the form of the memoirs of rural women, edited by Gałaj (1985). According to the relations of the women, the fact that a woman was pregnant did not waive the usual housework obligations. This kind of tasks was considered feminine (Szpak 2013) and men did not undertake to perform any of them, therefore the woman could not count on the support of the man. As the sources indicate, help and support regarding babysitting was sometimes provided by the maternal grandmother of the child. However, it was difficult to count on any help or support from the in-laws, including mother-in-law and sister-in-law, both at the time of childbirth and during several days following the event. Hence the appreciation of healthcare provided in the Interwar period. Staying in hospital made for the women an occasion to rest and escape from the usual hard labour in the household, providing the feeling of safety. The maternity ward was considered not only a quite comfortable place, but also a place where both village and town women have an opportunity to meet and exchange cultural patterns between the two groups. The memoirs edited by Gałaj express the loneliness of the mother, during the period of pregnancy, when giving birth and taking care of the new-born child.

We could have expected that the modernization of the methods of production in agriculture would result in the diminished importance of physical strength, which in turn would allow for the liberation of women from the roles imposed by the mere biological differences. However, the changes resulting from mechanisation of agriculture and labour-saving innovations involved mostly the ones that made it easier for men to perform their social roles and the process of change in the field of female roles was rather slow. Modernisation, electrification of the village and technological innovations – all of this should have resulted in some new solutions making the life of rural women easier, however it was not always the case. The implementation of innovations in the village household coincided with the more and more widespread phenomenon of part-time farming of men, whose wives had to take over some of the duties involved in working on the farm. Making life easier in one area of life resulted in new responsibilities. Apart from the obligations regarding running the household and taking care of the whole family, women began performing new tasks and roles, what resulted in a serious overload of work (Tryfan 1968; Wawrychowska-Wierciochowa 1961; Turowski

⁷ Which would be the case when the fertility rate equals between 2.1 and 2.15 (i.e. average 210–215 per 100 women in the age between 15 and 49 years old).

1964). However, there were some changes in the model of family: the traditional authoritarian model was still visible, but the number of families organized according to such principles was definitely lower than it used to. The division of power in the families began to change. The status of wife and children in worker-peasant families started upgrading. According to research, despite the fact that the official status of mother and wife remained still within the borders set up by tradition and culture, her real position was higher – it was the result of her being in charge of economic and financial resources, which in turn provided her with a significant share in the system of power within the family. According to Nowak, women regarded those responsibilities as a mere burden because it was difficult for them to meet the demands of modernity (Nowak 2003).

Culture norms are another set of factors influencing the readiness of the women to take on maternity roles. According to those norms, women are supposed to perform a significant part of work involved in running a household, including both housework and babysitting. As research results show, the resistance of women against those conditions is growing. According to *O roli kobiet w rodzinie* [*The Role of Women in Family*] report compiled by CBOS⁸, although the majority of the examined women declared that the family model based on equality and partnership⁹ is the most preferable, the model existing in their own families is rather a traditional one¹⁰.

Rural women in the labour market

In the interwar period, the topic of rural women was presented, if at all, as a problem, as a factor dilatory to the changes of the village due to deficiencies in women's education, their attachment to the old behaviour patterns, influencing the men in a negative way (Chomicki 1938). Researchers and activists were advocating the introduction of programs aimed especially at women living in rural areas, so that they would be able to participate more fully in the social life. In the interwar period, the emphasis was put also on the search for female stereotypes which fulfilled the goals considered by the authors at the time to be the key ones.

⁸ *O roli kobiet w rodzinie*, CBOS, March 2013, http://www.cbos.pl/SPISKOM.POL/2013/K_030_13.pdf [date of access 12.01.2015].

⁹ Model based on equality and partnership – a model of family, in case of which the husband (male partner) and the wife (female partner) spend more or less the same amount of time on professional career and both of them equally take care of the household and children.

¹⁰ Traditional model – a model of family, in case of which only the husband (or male partner) works for money, earning an amount sufficient to satisfy the needs of the family, while the wife (female partner) takes care of running the household, raising children etc.

Such ideal women would be bringing the children up in the patriotic spirit, undertaking actions for the benefit of the society and improving their households. Women of this kind were presented as role models for other women. As we can see, the activity pattern of these women go hand in hand with the traditional female role models: those of good mothers, housewives and local female activists. One of important problems, mentioned by researchers at the time, was the issue of unpaid women's work for their families and households, life-long and very hard. According to the results of research projects of that time, the estimated time of female work in the household was about 500 hours longer than in the case of men (Curzytek 1935), and female work was often considered to be less important, unappreciated and despised. It was observed that rural women strived strongly for migration (see e.g. Duda-Dziewierz 1938), with destinations in towns or foreign countries. It was a pursuit for upward social mobility; however, women were rarely successful, because of the lack of workplaces available for them (as a result of fixed social structure and deficiencies of Polish economy).

In Communist countries, the rights and privileges of women were a result of the Marxist ideology. Equality between men and women was expected to be a result of defeating capitalism and it was not considered to be a possible effect of the activity of women emancipation movements, which, according to the ideologists at the time, were only drawing women away from changing the world in a more reasonable way. The Constitution of PRL (Polish People's Republic) of 1952 declared all the citizens equal, regardless of gender. War damages, losses in male population in the whole Europe, fast industrialization resulting in women beginning to work in manufacturing industry, forced states to let women enter the labour market and adjust the law to the changing reality. The post-war industrialization process in Poland, engaging men in jobs outside their farms, was the reason of the feminization of the farming profession. Another result of such processes was the fact that a new professional category emerged – “blue collar farmer” (chłoporobotnik) (Błąd 2011). For the pre-war peasant women and female factory workers, PRL was actually a real chance of improving social and professional status. New legislative solutions improved the access of women to the welfare services, education, and the facilities fulfilling most basic needs (e.g. hospitals and maternal care). Unfortunately, equality set up in the provisions of law was not accompanied by changes in social norms. Men were not encouraged to take care of their children so that they could help women with the housework. Performing female tasks in traditional village communities was considered to be humiliating (Szpak 2013).

New division of duties, forced by the conditions under which the family operates, made the labour market positions of women and men living in the village more equal, however it did not result in any significant change of the division of the burden of household duties. In Poland, the division of the above still is not equal with regard to sex, especially in the village, and in the majority of cases the

women are responsible for performing those duties (Titkow, Duch-Krzysztozek, Budrowska 2007). According to research, there is a high workload imposed on rural women with regard to household duties including taking care of the family members and running the households (Auleytner 2007: 114). The process of changes in this field, involving the creation of new family, household, and family-professional relations in village families, is a slow, lengthy and difficult one. It seems that, at least for the time being, the changes involve mainly increasing range of female responsibilities, without really relieving the burden of duties the women used to perform or dividing the babysitting and housework duties between the men and the women. Actually, the accessibility of some spheres of life increases and new possibilities open up for women, however sometimes a huge burden of those duties makes it difficult for them to take those chances as easily as men. As a result, women are less active than men on the labour market. In 2009, professional activity rate (share of professionally active and unemployed in the population of more than 15 years old) of the rural women equalled 46.4%, whereas the same rate for men equalled 64.4%; employment rate (share of employed people in the population of more than 15 years old) of the rural women equalled 42.2%, and the same rate for men equalled 59.8%; the unemployment rate (share of the unemployed in the population of people professionally active) of the women equalled 9.1% and in case of men 7.2%. In worse situation found themselves landless women, who do not possess a farm – the professional activity rate in this group equals 37.8% and the employment rate 32.9% (*Obszary wiejskie w Polsce* 2011).

Professional activity of women involves the necessity of combining professional and family roles, and the possibility of accomplishing this task successfully depends mainly on structural and cultural factors (Kotowska 2009). Structural factors include institutional solutions, facilitating employment of women (e.g. the way the institutional care is organised or employment policy involving solutions such as flexible working time, possibility of part-time work or family benefits). Cultural factors include the way the male and female social roles are perceived, how men and women are perceived as employers and family members, how the representatives of both sexes participate in taking care of the children, elderly people or how the household duties are distributed. Due to the fact that the functions related with taking care are ascribed to women, they are considered to be responsible for this kind of duties in the family, and their usefulness as employers is assessed from the perspective of their family duties rather than on the basis of their competence, experience or other individual features.

The incompatibility of the institutional solutions with the employment of women creates so-called structural conflict, and the attitude towards male and female social roles, especially with regard to the relation between career and family, results in the escalation of so-called cultural conflict (Kotowska 2009). In Poland, especially in the village, we can observe two kinds of conflict. Structural conflict is a result of the lack of proper structural solutions that could help

women in taking on new possible activities outside home: lack of infrastructure including nurseries, kindergartens or day care centres for elderly people, result in a situation where this kind of duties related with taking care need to be performed within the family. What is more, the expectations of the members of society that those duties will be performed by women result in the escalation of the cultural conflict. Another problem is the fact that the rural labour market is incompatible with increasing education level of village woman, who have no possibility of finding in the village a job that would be suitable with their education. The obstacles related with poor road and rail infrastructure (bus and train connections are being cancelled) make it difficult to search for a job outside the closest vicinity of one's residence.

Women social roles

The person responsible for representing the family in the public sphere used to be the man, acting on behalf of the rest of the members. The role of the women was limited to the tasks related with home and family. Civic involvement of rural women increased in the Interwar period. Under circumstances of the Polish state enjoying newly acquired independence, women living in rural areas were considered to be responsible not only for maintaining proper hygiene and nourishment standards in rural households, but also for the socialization of future generations of the residents of rural areas in the patriotic spirit. In the Second Republic of Poland, women from rural areas, together with all Polish women, obtained both active and passive voting rights. There was many actors who wanted to influence rural women: among them were members of national movement, peasant and Sanation activists, as well as representatives of the Catholic Church (Józefowicz 2011, as cited in Matysiak 2014b). Matysiak (Matysiak 2014b) notes, that young women were involved in village youth organizations, running cultural and self-education projects. Moreover, many educational initiatives were addressed to women living in rural areas, among others special schools for rural girls (Mędrzecki 1992, as cited in Matysiak 2014b). The main structures activating adult women living in the villages were Koło Gospodyń Wiejskich associations (Rural Women Association, KGW), in which women were acquiring a plenty of practical skills related with running a household, and were developing the cooperative movement in villages (Mędrzecki 2000, as cited in Matysiak 2014b). First rural women took the positions of sołtys [the elected head of a rural "gmina"] or councillors and became members of local governments. However, the total share of the women in local authorities was still symbolic because local government activity was still perceived to be a masculine sphere (Wawrzykowska-Wierciochowa 1961, as cited in Matysiak 2014b).

It was after the Second World War, when the changes taking place in the village were accompanied by the increasing possibilities of performing such roles in a different way and together with the political transformation, that new roles emerged: social, professional and other, available for women to various extent, depending on different rural milieus. The process of adopting new roles, involving participation in the public sphere, was a gradual one and it had its own distinct features depending on the set of political, economic and cultural factors of a specific historic period. In the times of PRL, the social and political activity of women living in rural areas was to be one of the “tools” of the modernization of villages, according to the vision of the authorities of that time. After the Polish October¹¹ (1956), associations of *Koło Gospodyń Wiejskich* became the main structures engaging rural women. In 1989, just before the political system transformation, there were over 35,000 KGW associations with over 1,000,000 female members (Marczakiewicz et al. 1992: 27, as cited in Matysiak 2014b). KGWs were a part of the structure of farming associations and (since 1966) a collective member of Polish Women League. KGWs performed many useful tasks for people living in rural areas, for example they organized care for children during time-consuming farming activities, courses of sewing, baking and cooking, promoted traditional handcraft and folk culture, and at the end of the PRL era also farm tourism and village entrepreneurship (Grzebisz-Nowicka 1998, as cited in Matysiak 2014b). The focus on the practical, “girlie” issues had been on one hand protecting KGWs against excessive politicization, but on the other hand, they failed to have any positive impact on strengthening the status of women as an interest group or breaking new ground for social roles of the women (Siemieńska 2005, as cited in Matysiak 2014b). There were also social organizations, like Rural Youth Union (*Związek Młodzieży Wiejskiej*) where young girls were getting involved in, but the share of the women living in rural areas and performing local public functions was still low. For example, at the end of the 1960s, the percentage of women at *sołtys* positions was only 2.8%. The percentage of women among the councillors of rural National Councils and the heads of *gminas* was also low (Matysiak 2014a, 2014b).

Matysiak (2014b) underlines that the range of public roles considered to be proper for women living in the villages was relatively narrow, but the change of political, economic and institutional conditions caused by political system transformation process which begun in 1989, resulted in a diversification of the types of local structures within which rural women can perform public functions and engage in civic activities. One of the most popular organizations are still KGWs and they perform more innovative actions apart from rather traditional ones which used to be their key activities in the past, but the women living in a village often act also within structures related with school, Church and local parish. They also

¹¹ A change in the politics of Poland in the second half of 1956, connected with change of political leadership inside the communist party and liberalization of political system.

engage in the activities of organizations relatively new in the local milieu, such as local associations (e.g. those running so-called “small schools” [small non-public primary schools]), Odnowa Wsi associations (“Village Revival”) or Lokalne Grupy Działania (“Local Action Groups”), and sometimes even in traditionally masculine OSPs (“Volunteer Fire Department”).

The level of engagement of rural women in the area of social and civic activity is growing. However, the women’s share in making the decisions at the local government level is still very low. If women participate in any kind of social activity, they prefer rather informal ways, often involving acting for the benefit of local community. The reason for this may be related with the fact that in the majority of cases the seat of the organizations is located in towns and cities (48%), whereas in the rural gminas 30% of organization seats are located, and in urban-rural gminas there are 22% of seats (Herbst, Przewłocka 2011). Unfortunately, there is no data on the share of village women in non-government organizations – all we know is that, according to the recent report of Stowarzyszenie Klon/Jawor (Herbst, Przewłocka 2011), 60% of the total population of members of organizations of any kind are men, and there is average 58% of them in the authorities of the organizations. It is quite the opposite in case of volunteers and employers of the organizations, 60% of them being women.

More and more women living in rural areas acquire positions in the local government. In the last local government term of office, women constituted c. 25% of gmina councillors and slightly over 35% of sołtyses in Poland (Matysiak 2014b). The representation of the women in every level of local authorities is low. The share of women equals 25.4% of councillors in rural gminas and 24.9% in urban-rural gminas (in case of urban gminas – 26.6%), and the smallest share of women can be found among the members of the District Council – 18.7%; 23.6% of the councillors of regional parliament of the province are women (unfortunately, we do not know, how many of them come from the rural areas) (*Sytuacja kobiet w rolnictwie* 2012). The women living in the village talk about barriers that make it difficult for them to take on some kind of social or political activity – the reason of this lack of participation that was indicated most often is the lack of time (over 70% of choices), which in turn is often a result of too much work and too many housework responsibilities. Other indicated problems included economic or cultural barriers, as well as those related with long distance from town, and stereotypes related with sex and gender discrimination. We should take into account the high level of social control in the village, which is often mentioned as one of the cultural barriers, as well as the stigmatisation of those actions and behaviour that are considered to be inconsistent with the social norms. In some milieus, the latter include women acting as politicians (Walczak-Duraj 2008). As we see, the above obstacles are more difficult to deal with for women than for men living in the village, which is one of the reasons of often emphasised (sometimes also criticised) low share of rural women participating in official and organised social activity.

Conclusions

We are currently witnessing rapid changes in the way female social roles are perceived. The phenomenon is especially visible in rural areas because the traditional divisions with regard of gender roles survived there much longer. As we see, rural women are more and more eager to reach for the new possibilities created by social and cultural changes.

Sometimes the opportunity to take the chances resulting from the changes taking place in Poland is limited both by external factors, related with traditional mind-set and by the features of a particular milieu. What is a problem of many rural areas is a structural exclusion involving, among other factors, poor technological infrastructure, including housing (sewer systems, gas-lines etc.), commuting (bad condition of roads, poorly managed and unprofitable public transport, and in some cases even a total lack of it) or no poor access to the Internet. Social infrastructure is also insufficient, as the access to healthcare, educational and cultural facilities is more difficult in the village than it is in town. Whereas poor technological infrastructure affects both men and women more or less equally, the lack of proper social infrastructure is a more serious problem for women because, according to the traditional social norms, it is their responsibility to perform duties involving babysitting or taking care of elderly, ill members of their families. Moreover, the income level of the rural household is lower than it is in the case of the urban one, so is the level of education, and the level of unemployment is also higher in the village – especially among rural women.

Traditional patterns of social roles and division of labour, still present in the rural community, tend to prepare women for the roles involving taking care and rising children, as well as for household chores performed in a farm setting rather than for performing independent professional roles or participating in activities of social or political sphere. We do not have enough research that would make it possible to find out whether the traditional idea of the social role of rural woman is changing in the rural community.

Usually, women are eager to take on activities of the new roles – especially when both the women and their social milieu consider the roles to be desirable and acceptable. One of the examples may be the raising level of education of rural women (they have taken part in an incredible educational boom, compensating in quite a short time the delays and shortcomings of the past – they are now even better educated than the men living in rural areas).

Unfortunately, the increasing level of education still does not result in any immediate improvement of the situation of women on the labour market. Female residents of the village still find it difficult to find a job matching their level of expertise. Moreover, the increasing variety of roles performed by the rural women is not accompanied in changes in the field of traditional roles. Although, accord-

ing to research, they claim they would like to have a new, more equal division of responsibilities, it is still their responsibility to run the house, take care of the members of the family and perform other duties set up by traditional female roles. There are more and more female residents of the village, whose ways become different from those of a traditional model. However, those different roles are still regarded as a mere adaptation to some peculiar, difficult circumstances rather than an equally suitable alternative model of new kind of activity. It will be impossible to overcome the above barriers without changing the attitude of people living in the village and improving the infrastructure and institutional environment which would help the rural women make their dreams and ambitions come true.

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Ilona Matysiak, PhD

Maria Grzegorzewska University

**THE DETERMINANTS OF WOMEN'S PARTICIPATION
IN THE SUBCOMMUNAL SELF-GOVERNMENT
IN RURAL AREAS IN POLAND – THE CASE
OF VILLAGE REPRESENTATIVE (SOŁTYS)**

Introduction

The function of a village representative (sołtys) in Poland is as liaison between the residents of a rural subcommune (sołectwo) and the local authorities at the superior levels. In the last few decades the number of rural women serving as village representatives has increased significantly. In 1958, the percentage of female village representatives in Poland amounted only to 0.8%, whereas in 2013, this percentage reached 35.5%. The share of women among village representatives is higher than among the elected members of the legislative bodies at all levels of the local self-government (25% in 2010) or among mayors and city presidents (not exceeding 10% in 2010) (Niżyńska 2013: 44; *Monitoring list wyborczych...*). This increase provokes questions about the possible reasons of this process.

The aim of this article is to analyze the determinants, which are decisive for the growing share of women among the village representatives in Poland. According to the political elites recruitment theories, assuming of public functions is conditioned by factors associated directly with individuals themselves and by features of political roles and structures. On the one hand, we will thus examine the socio-demographic characteristics and motivations of female and male village representatives; on the other hand, we will analyze the social perception of the village representative function itself. The available public statistics indicate that the share of women among village representatives is visibly higher in some regions of Poland than in others. As a result, the analyses presented in the text will be partially focused on the impact of contextual factors.

This chapter is based on a qualitative empirical study that covered ten communes located in different regions of Poland. First, details about the function of the village representative and rural women's participation in the subcommunal self-government will be provided. The following section discusses the metho-

dology of the analysis. The subsequent parts of this article are devoted to the presentation of the empirical data. This chapter is a review of selected topics, discussed in detail also in other publications of the author¹.

Rural subcommunal self-government: the village representative

The institution of the village representative (*sołtys*) has a long and well-established tradition in Poland. It is rooted in the processes of settlement under German law in the Medieval Age. In the following periods, the obligations of village representatives and the nature of their role kept changing depending on political and economic conditions.

According to the legal regulations introduced in 1990, which recreated the local self-government in Poland after decades of state centralization under the communist regime, the institutions of the rural subcommunal self-government operate in the frame of a rural subcommune (*sołectwo*) being the auxiliary structure for the commune (*gmina*). In terms of territory, rural subcommunes are the administrative units located within communes. The area of a rural subcommune usually covers one village or, less frequently, two or more small villages or a part of a bigger village. Currently, there are 40 583 rural subcommunes in Poland (Central Statistical Office 2014: 39). In terms of the structure of power, rural subcommunes are dependent both financially and institutionally on a communal self-government – they have neither their own full legal identity nor an independent budget². Today, a village representative is the executive officer of a rural subcommune (*sołectwo*), which functions as the auxiliary structure for the commune (*gmina*). The institutions of rural subcommune also include a village assembly (*zebranie wiejskie*) – the legislative body – and a village council (*rada sołecka*) – the advisory body to the village representative. Their position within the structure of the Polish local self-government is presented in Table 1.

¹ Articles discussing the issue of the structure of social capital of female and male village representatives (Matysiak 2013a), the motives to perform the village representative function, presented by women and by men, as well as various benefits of this function (Matysiak 2013b), “feminization” of the village representative function (Matysiak 2014a). The complex analysis of the mentioned threads as well as other relevant topics not elaborated in this article are provided in the book on the role of female and male village representatives in rural communities in today’s Poland (Matysiak 2014b).

² Since year 2009 the commune councils can create a village fund (*fundusz sołecki*), used to provide financial support for the rural subcommunes. However, it should be noted that some communes implement their own mechanisms of providing financial support for their rural subcommunes, independent of the village fund (Lachiewicz 2013).

Table 1. The organs of local self-government entities in Poland in year 2013

Entities	Executive bodies	Legislative bodies
16 provinces (województwa)	province executive board (zarząd województwa) chaired by province marshal (marszałek)	province regional assembly (sejmik wojewódzki)
314 districts (powiaty) 66 cities with district status (miasta na prawach powiatu)	district executive board (zarząd powiatu) chaired by starost (starosta) city president (prezydent miasta)	district council (rada powiatu) city council (rada miasta)
2 479 communes (gminy)	mayor (wójt/burmistrz)	commune council (rada gminy)
40 583 rural subcommunes (sołectwa)	village representative (sołtys) supported by village council (rada sołecka)	village assembly (zebranie wiejskie)

Source: Central Statistical Office (2014: 38–39).

Village representatives embody the interests of the residents and are expected to manage the daily problems of a given rural subcommune, such as those associated with the local infrastructure. They also perform administrative tasks, such as informing the residents about the communal authorities' plans and decisions or organizing village assemblies, and they are expected to mobilize the residents for collective initiatives. Village representatives and members of the village council, as their advisory body, are elected by the residents of rural subcommunes. The election involves a secret, direct voting method, which mostly takes place at the village assembly. Residents of the rural subcommune can present themselves as a candidate. The term of office for the village representative is usually four years.

According to the principle of subsidiarity, the local authorities of each commune are free to decide what range of responsibilities should be passed to the rural subcommunes' self-government within their administrative territory. However, often, communal authorities do not bother to precisely define the competences of village representatives. This lack of action is because they are not eager to pass any significant tasks to rural subcommunes or they perceive the scope of duties of village representatives to be common knowledge and not requiring specification. As a result, the activities of the village representatives become determined by the expectations of the residents, attitudes of particular commune authorities, and intentions of village representatives themselves. It has to be noted that village representatives can participate in commune council meetings, but they do not retain the right to vote. Therefore, the impact of the village representative on local decision-making processes consists of "back-stage" negotiations or exerting informal

influence over the local authorities. The position of the village representative is perceived as unpaid, voluntary work. However, four times a year, many village representatives collect local taxes from the rural subcommune residents on behalf of the local authorities and receive the equivalent of a small percentage of the collected sum as the gratuity for their efforts. The local authorities may also assign to their village representatives a remuneration for participating in the commune council meetings (Matysiak 2014a: 702–703). However, usually, the amounts of money received by village representatives are perceived as rather symbolic.

Women's participation in the rural subcommunal self-government

Polish women officially acquired the right to run in elections at all levels in year 1918. However, women living in rural areas were not expected to even take part in village assemblies, as the role of representing the voice of a given family was traditionally prescribed to men. According to the existing literature, women were not really present in the structures of rural subcommunal self-government neither before the World War II nor shortly after (Jakubczak 1976). However, the available data indicate a significant and stable increase in the percentage of women among village representatives in Poland in recent decades. In 1958, the share of women performing this function amounted only to 0.8%; however, in 1967, the percentage reached 2.8%. The survey of a national sample of Polish villages, conducted in the mid-1990s, showed that the share of women among village representatives was 11.0% (Ostrowski 1995). Currently, at the end of 2013, the percentage has amounted to 35.5% (Table 2).

Table 2. The share of women village representatives, years 1958, 1967, 2009, 2013

Year	Village representatives (total number)	Women village representatives (total number)	Share of women among village representatives (%)
1958	40,589	317	0.8
1967	39,822	1,099	2.8
2009	40,254	12,144	30.2
2013	40,382	14,322	35.5

Source: Central Statistical Office (1968), Local Data Bank, www.stat.gov.pl [date of access 9.10.2015].

The analyses of data, conducted by the author, pertaining to the share of women among village representatives in years 1990–2007 in 172 rural and rural-urban

communes, located within the selected nine subregions³ showed that stable, linear growth in the number of women among village representatives in this period was particularly visible during the last two terms of office of the rural subcommunal self-government (see Matysiak 2014b: 81).

Interestingly, in the case of some Polish regions, the share of women among village representatives is significantly higher in comparison with the other parts of the country. The similar pattern is observed in case of women among commune councilors. The percentages of women village representatives and communal councilors are visibly higher mostly in the areas added to the Polish territory after the World War II (marked in a lighter grey color) and lower in the areas of the South-East Poland (marked in a darker grey color) (Table 3).

Table 3. The share of women among commune councilors and village representatives in rural and urban-rural communes by provinces in 2013

Provinces	Share of women among council members	Share of women among village representatives
Zachodniopomorskie	32.2	47.4
Dolnośląskie	32.0	42.9
Warmińsko-Mazurskie	31.5	40.7
Lubuskie	30.1	42.5
Pomorskie	27.7	39.4
Opolskie	27.3	42.5
Łódzkie	27.3	36.1
Śląskie	26.5	36.5
Mazowieckie	25.9	36.6
Kujawsko-Pomorskie	25.6	35.9
Wielkopolskie	23.4	30.6
Małopolskie	23.1	30.9
Świętokrzyskie	23.1	38.4
Lubelskie	21.3	34.2
Podlaskie	20.8	24.8
Podkarpackie	18.3	20.7

Source: own calculations, Central Statistical Office, Local Data Bank, www.stat.gov.pl [date of access 9.10.2015].

³ The data were obtained via e-mail directly from the communal offices on the basis of the request for access to public information.

These observations indicate that also the contextual factors must be taken into account while analyzing the determinants underlying the increase of women among village representatives. Differences between Polish regions, which historically belonged to different powers after the partitions and territorial redistribution following the World War II, pertain to many aspects of life, including the degree of urbanization, demographic structure, access to communication infrastructure, voting preferences and economic performance (Nowak et al. 2000; Żukowski 2004; Zarycki 2007).

Theories of the political elite recruitment and own research assumptions

The concept of recruitment of political elites has its roots in the classical theory of elites of Mosca, Pareto and Michels, developed by the subsequent researchers, e.g. in the dimension of the government elites and the functioning of elites in the democratic system. Putnam defined the political elite as those, who, in a given society, occupy the highest positions in terms of political interests, involvement and influence (1971: 651). We can also speak of local political elites, that is, persons, who occupy key positions in the formal structure of authority and/or are perceived as people having power, or playing substantial roles in the course of the real political processes at the local or regional level (Bartkowski 1996).

Membership in political elites at various levels is conditioned by the political recruitment mechanisms. According to Schwartz (1969: 552), political recruitment has been conceptualized “as a process by which individuals possessing certain personality traits and occupying specified social positions [...] are screened by political institutions for elective office”. The personality traits as well as the individual’s expectations or predispositions about politics constitute the motivations, which, also, tend to be regularly associated with specified social backgrounds and positions providing visibility, social prestige and valuable experiences. Those individual’s motivations and social resources meet the preferences of the screening institutions, for example political party recruiters (*ibidem*). According to Prewitt (1970), the recruitment process can be compared with a Chinese box puzzle, which serves as a metaphor of gradual and continuous selection and elimination which reduces the population to the few who eventually get into the political positions.

According to the political recruitment theories, this process can be analyzed in two dimensions: “Studies of selection will mainly concentrate on those who select candidates, the demand side of recruitment, while studies of self-selection will mainly focus on features of the individual candidates, the supply side of recruitment” (Aars, Offerdal 1998: 210–211). The dimension of „supply” can be ascribed the social and the individual aspect. The former encompasses social and

demographic characteristics of individuals. As it has been noted by Gąciarz and Bartkowski (2012: 143), "In the perspective of the local politics, significant for the politician are such resources as education, a profession, which gives them social recognition (doctor or teacher), social origin and – very significant for the local communities – the place of birth". Great importance is also attached to social and political activity experience within the framework of various types of local structures (Bartkowski 1996). The latter refers to individual preferences, mainly psychological, including motivation and interest in politics (Jasiewicz-Betkiewicz, Betkiewicz 2012: 256). The dimension of "demand" is ascribed an organizational aspect, that is, political structures and institutions, which "attract" specific individuals (*ibidem*). According to Harasymiw (1984: 17–25), the nature of political roles as such and the preferences of the "political selectors" are of significance here. At the same time, the analysis drawing at the political recruitment approach should combine both perspectives in order to avoid being too institutional or too individual (Fowler 1993: 42).

The assumptions of theories of political elite recruitment are inspiring in the context of analysis pertaining to female and male village representatives. First of all, the function of a village representative is subject to election – thus, it can be expected that the elections are usually accompanied by political behaviors, associated with building of support among the inhabitants or election competition. Secondly, female and male village representatives, should cooperate with the local authorities and officials as well as other actors of the local public scene, convince them of the rightness of what they plan to do, build alliances and coalitions. Thus, it can be stated that the position of a village representative is a social and a political one. On the one hand, it assumes the voluntary commitment of the village representative to the local public affairs; on the other hand, it is associated with representation and activity within the framework of the local politics.

What are the determinants, which are decisive for women currently becoming village representatives much more frequently than in the past? Should the reasons be sought in the structure of social resources of women, their individual motivations or the character of the function itself? Searching for an answer to these questions, first, we will analyze the social and demographic resources as well as motivations of female village representatives in comparison with men, performing the same function. Secondly, we will analyze the social perception of the village representative function itself. In the light of research conducted by Fuszara (2006), this function is not perceived as attractive and prestigious, which may result in its greater "availability" for women. Thirdly, we will examine the importance of the specific nature of the local context.

The chapter is based on an analysis of qualitative data collected from ten communes located in different regions of Poland. Due to the goals of my doctoral thesis, the communes were chosen because of their different proportions of women serving as village representatives and commune councilors. Two communes

– “feminized” and “masculinized” – were examined in each of five chosen regions of Poland (Table 4). The former was understood as the percentage of women among village representatives and commune councilors, which was close to 50%, and the latter represented communes where the percentage of women village representatives and commune councilors did not exceed 30%.

Table 4. Characteristics of communes subject to research, year 2009

Province	Zachodnio-pomorskie		Mazowieckie		Lubelskie		Wielkopolskie		Podkarpackie	
Commune	Dobra Szczeńska	Mielno	Kałużyn	Wyszogród	Serniki	Ryki	Murowana Goślina	Czerwonak	Lu-towska	Łańcut
Type	rural	rural	urban-rural	urban-rural	rural	urban-rural	urban-rural	rural	rural	rural
Population	15,569	4,935	6,086	5,939	4,876	20,505	16,248	25,300	2,195	20,849
Share of women among commune councilors	53.3	33.3	53.3	6.7	40.0	19.0	53.3	28.6	13.3	9.5
Share of women among village representatives	66.7	12.5	75.0	11.8	46.2	23.3	25.0	36.4	66.7	11.1

Source: Central Statistical Office, Bank Danych Lokalnych, www.stat.gov.pl [date of access 15.03.2011].

Fieldwork was completed between November 2008 and December 2010⁴. In total, 108 individual in-depth interviews were conducted in all ten communes. The interviewees consisted of 51 women and men village representatives and 57 persons from local authorities, public institutions and organizations. The positional-reputational method was used for recruitment of the research participants. The qualitative data gathered provided exhaustive information on 62 rural subcommunes.

Own research results: age, education and origins

Both women and men village representatives were mostly between 41 and 70 years of age. Average age among women was 49, and men – 51. A decisive majority of the participants were married while research was conducted, and

⁴ Research was conducted within a research project financed by the Ministry of Science and Higher Education (N N116 433 237).

they had children (most often – two or three), in many cases, fully grown-up. However, the age structure of female and male interviewees also revealed some differences; women prevailed in the “younger” age categories (between 31 and 40 years). In the case of the youngest female representatives, they were often able to assume the function thanks to support in childcare, offered by their closest relatives.

A large number of female village representatives had completed vocational secondary education, whereas most of the male respondents had completed up to vocational secondary and a basic vocational level of education. Only a few had university education, and one – a PhD degree (Table 5).

Table 5. Level of education of the village representatives according to gender

Education	Women (N = 28)	Men (N = 23)
PhD	–	1
Higher	2	4
Secondary (including vocational secondary)	19	7
Basic vocational	5	6
Elementary	–	2
No data available	2	3

Source: own research.

The increased share of women among village representatives may be associated with overall improvement in the structure of education of female rural population in the recent decades, which has resulted in an increase in the level of their competences and life aspirations. In 1970, 5.7% women and 4.9% men living in the rural areas had secondary education, and 0.2% women and 0.6% men – tertiary education (Central Statistical Office 1981: 45). In year 2011, 25.6% rural women had secondary education (including vocational schools), in comparison with 22.2% men, while 12.1% women and 7.7% men living in the rural areas had university education (Central Statistical Office 2013: 106). It should be noted, however, that women and men with university education become village representatives less often.

In the literature on the subject, being „from here” is one of the main decisive factors in joining the local political elites (Bartkowski 1996; Pańków 2006; Bartkowski, Gąciarz 2012). One half of the females and two thirds of all interviewees were “from here”, which means: from the village, in which they are currently the representatives, or – possibly – from another village, located in the same commune (Table 6).

Table 6. The place of origin of female and male village representatives examined

Place of origin	Women (N = 28)	Men (N = 23)
„Own” village	12	12
A village in the same commune	2	4
The same region (district, province)	8	3
A different province	5	2
No data available	1	2

Source: own research.

As it was noted by one of the male village representatives examined, during the local election, a candidate “from here” has greater possibilities of mobilizing support within the framework of the family and neighborhood networks. Moreover, the chances for winning the post can be increased by being a member of a respected, committed family, recognized as such in the local community: *Well, my dad is in the village council. Earlier... he was a president of a farmers’ organization (kółko rolnicze). My mom is currently a member of the rural women’s organization (koło gospodyń wiejskich) [W.MG.8_m.v]*⁵. Five female and two male village representatives mentioned that they „inherited” this function directly in the family, most often from the father: *Perhaps it’s just going like this, generation to generation – before, it was my father, and now, there’s me... there was no competition. When people knew I would run in the election, nobody else would try [M.K.2_f.v]*.

On the other hand, in the case of one half of the women examined, coming „from somewhere else” did not make it difficult for them to become village representatives. Some of them stated they were perceived as warrantors of neutrality in the local conflicts. At the same time, due to lack of familiarity with relationships between the inhabitants and with the interest groups in the community, a “new-comer” may be more susceptible to manipulation by various “coteries”.

In the light of the above data, assuming of the function of a village representative is made easier by limitation of family duties due to age, or, in the case of younger women, getting some family support in childcare. Female rural inhabi-

⁵ Marking of interviews: the first letter means the province (Z – zachodniopomorskie, M – mazowieckie, L – lubelskie, W – wielkopolskie, P – podkarpackie), the second letter refers to the first letter(s) in the name of the commune, letters ‘f’ or ‘m’ refer to the respondent being female or male, the last letters indicate the category of the respondent – ‘v’ means village representative, ‘l’ means local leader, ‘c’ means commune councilor and ‘o’ means public official or a representative of another local institution.

tants are increasingly well-educated, which determines their life aspirations. The role of the origins is not clear – slightly more often, the village representative function was assumed to females from “elsewhere” in comparison to men.

Professional experience and social activity

The majority of the interviewed village representatives were farmers or beneficiaries of old-age or disability pensions (Table 7). Thus, they were able to manage their time more flexibly than people employed outside the agricultural sector, spending most of their time at their place of residence. This is of significance when taking into account the typical tasks of village representatives described earlier.

Table 7. The village representatives’ status on the labor market according to gender

Status on the labor market	Women (N = 28)	Men (N = 23)
Working at a farm	6	4
Employed outside agricultural sector	5	3
Self-employed outside agriculture	3	2
Old age pension (including farm retirement)	9	6
Disability pension	2	4
Not employed*	3	1
No data available	–	3

*In case of women “not employed” meant housewife or being unpaid helper in a family farm.

Source: own research.

However, most of the female and male village representatives examined had some experience in professional work outside agriculture. In the case of women, the scope of activity included: business activity (managing of canteen, milk purchase, agro-tourism, parking lots for tourists), working as a salesperson at the local store, a caregiver, local official, chief accountant, zoology technician, vacation center manager. Men mentioned such professions and activities as: business activity (managing of slaughterhouse, agro-tourism), mechanic, forester, academic teacher, assembler of airplane engines, jobs in the farmers’ organization, at the railway or the post office. Some of the interviewees – men slightly more often than women – pointed out they had been elected as village representatives mainly thanks to their professional experience, which warranted

them “visibility” in the local community and extensive possibilities of establishing relationships with people: *I have lots of contacts with people, as I purchased milk from them for so many years [L.S.1_f.v]; many workers were people, who used to work at the State Agricultural Farms⁶, so I know them directly, because they either reported to me, or their worked in mechanics, and I also knew them, if they worked at the cow houses and piggeries, I knew them all the same [W.Cz.1_m.v].*

At the same time, the most frequently indicated source of support and trust of the village inhabitants were the social activity experiences. 14 women and 13 men pointed to various forms of involvement before they became village representatives. Activity within formal structures was more typical among men than among women; there was also a trend of segregation of activity types of the interviewees depending on their gender (Table 8).

Table 8. The previous social activity of men and women village representatives

Type of experience	Female Village Representatives (N = 14)*	Type of experience	Male Village Representatives (N = 13)*
Rural women’s organization	6	Voluntary fire service	4
Parents’ committee	5	Village council	3
Informal activity	5	Sports organization	3
Youth organization	5	Informal activity	3
Church organization	2	Commune council	2
Participation in village assemblies	2	Social committee on local investments	2
Voluntary fire service	2	Hobby organization	1
Trade union	1	Trade union	1
Commune council	1	Farmers’ organization	1
Sports organization	1	Political party	1
Farmers’ organization	1	Youth organization	1
Village council	1		

* Most respondents pointed to more than one type of social activity.

Source: own research.

⁶ A State Agricultural Farm (Państwowe Gospodarstwo Rolne – PGR) was a form of collective farming created by the communist government in the Polish People’s Republic. The great majority of them have been resolved after 1989 due to political reasons.

In the case of female village representatives, the dominant structures and types of activity were those perceived as „feminine”, that is, engagement in parental committees and councils of parents at local schools, rural women's organizations and informal activities, e.g. helping the local inhabitants in dealing with local authorities and officials, organizing of food collections for the needy etc.: *It all started with the rural women's organization, and in the schools... I was in the [parents'] committee, or in the class committee, and lately in the parents council... it's all combined with one another* [L.R.6_f.v]. Interestingly enough, more women than men pointed to involvement in various youth organizations, such as the Rural Youth Association, the Association for Socialist Polish Youth, the scouting movement or the school self-government. This may mean that women, who started their „training” of participation in the local public life early, established a greater number of valuable contacts, and they were more widely accepted as the appropriate candidates for activity of this type.

A comparison of experience of social involvement of female and male village representatives with the generation of their parents indicates a visible increase in differentiation of the possible types of activity of women. 13 females and 15 males examined spoke of the broadly understood social or public activity among their close relatives. More often, these referred to the fathers – council members in the period of the Polish People's Republic⁷, village representatives and members of village councils, involved in the farmers' organizations, voluntary fire services (ochotnicze straże pożarne), folk ensembles and theaters; some interviewees also mentioned their grandparents and uncles, active in the prewar period or earlier (council member, people's movement activist, village representative). Active mothers or mothers-in-law were mentioned less often: mostly, they were involved in the rural women's organizations; several persons spoke of female council members, village representatives or librarians.

Thus, professional experience and social involvement contributes to becoming a village representative among women as well as men. However, the former, in the case of women, turned out to be slightly more differentiated than in the case of men. A similar phenomenon was observed with regard to the types of social activity undertaken by women, the scope of which has increased substantially in comparison with the experiences of the older generation. It should be noted, however, that the structure of professional experience and social involvement of the female and male village representatives has turned out to be strongly differentiated according to gender. It proves that women are able to make use of these experiences, even though they are less often connected to the local power structures.

⁷ The Polish People's Republic (Polska Rzeczpospolita Ludowa – PRL) was the official name of Poland since the early postwar years till 1989.

Individual motivations

Motivations to participate in the election for a village representative, referred to most often, included: willingness to do something for the village and its residents, a need to introduce changes, in many cases, due to lack of activity of the previous village representative, as well as satisfying of the need to get the feeling of causation and impact on the local affairs and being socially active. Money was rarely mentioned as associated with becoming a village representative candidate.

In the case of persons, who used to work outside the agriculture – both women and men – one of the impulses, accompanying the decision to become a village representative, was the need to remain active after becoming an old age or disability pensioner: *I had always worked with people, and I felt bad when I retired [L.S.12_f.v]; I am getting a disability pension, because I had a car accident... I'd sit at home, I couldn't work, my leg is causing problems. To find something to do for myself, well, that was one of the reasons to become a village representative [L.R.7_m.v].*

At the same time, the motivations typical only for women were identified in the frame of the study. One of the most active, and – at the same time – the eldest of the female village representatives examined (69 years of age) pointed to the „therapeutic” function of this position in the situation of the “empty nest syndrome”: *I am lonely now, because I've been a widow for 14 years, and I have plenty of free time. So I do my best to dedicate this time... to work on behalf of my village, and its residents, and thanks to it I escape from apathy, from feeling empty inside [Z.D.1_f.v].* For these women, who have never worked outside their household, becoming a village representative was the way to go beyond their previous family roles, and for those involved solely in agriculture – the possibility of gather new experiences: *I had not worked anywhere, I stayed at home, you know how it is, the children, the monotony of it all... and now there are meetings with different people, also other village representatives [P.L.3_f.v].*

The structure of motivations behind assumption of the village representative function by women and men thus differs in the context of “masculine” and “feminine” social roles. In the case of men, being a village representative compensates mainly their finished or discontinued professional activity; in the case of women, it also provides the opportunity to try a new role – that of an active member of local public life.

Social perception of the function of village representative

Most of the interviewees from all the communes, both village representatives and those belonging to other categories, expressed a general decrease in the significance of the position of village representative because of the current status of

rural subcommunes in the structure of local self-government: *In fact, there are many tasks assigned to the village representative, but the village representative can't do much. [...] The ideas have to be presented to the commune's authorities to convince the councilors to vote for a given investment to be carried out in this year and not in two or three years* [Z.D.10_f.v].

In the opinion of my interviewees, the function of a village representative was more significant and “attractive” before year 1989. During the period of state socialism, village representatives could access limited resources, such as fertilizers, construction materials, and farming machines, more easily than ordinary residents: *In the past... it was hard to get anything, under the communist rule, and this function allowed us to deal with the matters more easily.* [M.W.6_m.c]; *there were the allotments... fertilizers or something* [L.S.6_m.v]. It seems that, back then, the function of the village representative was more strictly associated with politics in terms of relations to local administration and the ability to benefit from those relations.

On the other hand, my interviewees pointed to the increasing social expectations with regard to activity of female and male village representatives. First of all, the demands of rural inhabitants are growing – they expect a high standard of the local infrastructure and quick solving of the problems reported. In particular, the female village representatives indicated being treated by the inhabitants as a 24-hour “emergency service for everything”. Moreover, the village representatives are increasingly often expected to act as local leaders, who build the social capital in the village and commit the people to participate in joint projects of local development: *there is demand rather for an activist, a leader* [L.R.4_m.c]. The growing social expectations are also due to the village fund mechanism. According to the Act on the Village Fund, which came into force in 2009, the communal councils can earmark funds from their budgets to support financially the initiatives or projects, which are collectively chosen by the residents of rural subcommunes located within their administrative area: *And wherever there are young women, village representatives, it really works well. And when you have a 70-year-old male village representative with 40 years of experience... such person will not be able to deal with the village fund* [L.S.10_m.o].

According to the interviews, the position of village representative requires a lot of time and commitment without bringing substantial financial or material benefits. Some interviewees claimed that these lack of benefits are part of the reason why the position no longer attracts men, particularly younger men who are more focused on paid work: *I think that men just don't feel like getting engaged in this. It's like a voluntary social work. They have other things to do* [L.S.1_f.v] (cf. Matysiak 2014a: 712–713).

The significance of the contextual factors

As it was mentioned before, the percentages of women village representatives are visibly higher in the areas added to the Polish territory after the World War II. Their primary inhabitants were forced to leave shortly after the war or fled before it ended. Afterwards, these territories were settled by people from different parts of prewar Poland. According to the literature, the new post-migration local communities created in this area are more willing to accept social innovations, such as women in local power positions, than other communities (Gorzelać and Jałowicki 1998; Bartkowski 2003). In comparison, the percentages of women village representatives are visibly lower in the southern and eastern regions of Poland, where local communities are characterized by the preserved continuity of traditions, which contribute to more conservative attitudes (Bartkowski 2003). Spatial diversity of the share of women in the commune councils are of a similar nature (see Table 3) (cf. also Pieśniewska 2005).

In the light of the qualitative research of the author, quoted here, the interviewees from “feminized” communes (with greater share of women in the local public sphere) much more often expressed positive opinions on the social roles of women and men, as well as women performing the local public functions. They tended to point out changes in the general way of thinking about the equality of men and women: *it seems to me that the social awareness has increased [...] women no longer fit this stereotype of only taking care of the house, children, cleaning, cooking [L.S.8_f.1]*. Apart from that, the “gender-specific traits”, such as sensitivity, scrupulosity, calmness and self-composure as well as a sense of responsibility and discipline, were acknowledged here as particularly useful in performing the functions of the village representative or council member. According to the interviewees, women were more sensitive than men regarding social problems, for example, related to children in deprived families. Emphasis was also put on the greater readiness of women to cooperate with local organizations and engage in activities on behalf of the common good: *they are more committed, more willing to cooperate. And men tend to go their own ways. Unless they're party members already [...] and they know there are benefits in it. Women are more focused on cooperation, on giving [Z.D.6_f.c]*. In those communes, women performing the services of a village representative or a commune councilor were perceived as competent and well-prepared for such tasks. In the “masculinized” communes, the majority of interviewees, including women, tended to declare that women were not interested in public positions because they focused on the home and family. Some of them suggested that it is a strong fear of failure and humiliation, which prevent local women from having public commitments. In the male-dominated communes, the particular “attributes”, described by interviewees as “female” ones, were, in many cases, the same as previously mentioned. How-

ever, they were more often assessed negatively or vaguely by men and women (cf. Matysiak 2014a: 711–712).

The differences identified between the „feminized” and „masculinized” communes indicate also the significance of the type and “density” of the local structures. Interestingly, in the “masculinized” communes, the local male-dominated structures and organizations, mainly voluntary fire service teams, sports clubs and political parties, were listed as the most active and visible in the local public sphere. This decreases the chances of women gaining social support and different experiences, which could strengthen their position in the local community: *No women can be seen. The trainers, men only, are at school, it is about the youth. They are already showing like this [Z.M.11_f.v]; women never meet, really. Perhaps at the school [...] only there, well, it's mommies who usually attend the parents' meetings. And men are like [...] there's a fire service team meeting – they go, a rural assembly – usually men go, and also that PPP (Polish People's Party)⁸ meetings [M.W.8_f.c].* In contrast, in the “feminized” communes, the number of active local organizations, including male-dominated ones, is smaller, in general. Thus, it can be expected that the lower density of social capital, especially in terms of “masculinized” local structures, contributes to greater openness of the local public sphere for women (cf. Matysiak 2014b: 180–182).

The above analyses indicate that the historic conditions, regional differences in continuity and migratory origins of the local communities as well as dominant types of local organizational structures largely shape the scale of participation of women among village representatives (and, to a lesser extent, the commune councils), as well as attitudes towards female and male social roles. The greater participation of women in the local public sphere, the positive assessment of women in the public roles and lesser „density” of local structures, particularly those, which are traditionally perceived as being „male”, seems to contribute to assumption of the village representative function by women.

Conclusions

Increase in the number of women among village representatives is conditioned by a number of social, individual and organizational factors. On the one hand, rural women are increasingly well educated, they earn diversified professional and social experience, thanks to which they become visible in the local community and they are able to win trust of the inhabitants. Those experiences, however, are different in comparison with men, as usually they encompass profes-

⁸ The Polish People's Party (Polskie Stronnictwo Ludowe – PSL) is an agrarian and Christian democratic political party characterized by relatively strong and numerous local structures.

sions and forms of activity perceived as “female”. Assumption of the village representative function by women, particularly those not working outside agriculture or focused mainly on family and home life, is usually accompanied by a specific motivation – perception of being such representative as the possibility to get new experience and “go beyond” the previous roles, associated with family and the farm. On the other hand, the village representative function itself, although often perceived as requiring time and effort and bringing no visible, calculable benefits, is becoming increasingly “available” to women. Men prefer to invest their energy in different areas – in professional activity or in competing for more prestigious positions, associated with a greater scope of formal authority (e.g. a function in the local self-government at the commune or higher level).

The universal tendencies, depicted above, are strengthened or blocked by contextual factors. At the regional level, these include the historically shaped attitudes of conservatism toward traditional gender roles conditioned by the level of continuity of the local communities and their migratory origins. The differences in the historic background overlap with effects of the subsequent social and economic development process and the specific nature of particular localities, which “deform” the pattern of regional diversity.

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Magdalena Dej, PhD

Institute of Urban Development in Krakow

**COMPANY RELOCATION TO RURAL AREAS
IN LARGE METROPOLITAN REGIONS IN POLAND
– SCALE AND KEY CHARACTERISTICS**

Introduction

Plant relocation has been a subject of interest to researchers for decades and the debate in the research literature remains lively. Business enterprises are forced to constantly respond to new events in the marketplace, changes in consumer trends, environmental regulations, technological processes, and many other factors. In many cases, the response to such events and factors takes on a spatial dimension. Location can become an issue when a company's local environment changes and relocation to another geographic area may become necessary. In other cases, a company's needs change over time and relocation may become necessary in order to grow or change in some other meaningful way (Pellenbarg, Wissen, Dijk 2002).

The spatial dimension of plant relocation and its significance in various spatial dimensions changes over time. Relocation on a global scale is currently a mainstream issue in the research literature. Plant relocation on a local or domestic scale is less often debated in the literature. However, it is relocation at the lowest spatial scale that appears to be especially interesting in terms of real processes occurring in each affected area or the real effects of plant relocation on local and regional communities.

The scale of economic activity is largest in major metropolitan areas, which often concentrate economic potential on a domestic and international scale. However, it is also true that many different factors are pushing businesses enterprises outside of city limits and often beyond the boundaries of entire metropolitan areas. The factors that drive this new change vary from place to place and include both push and pull characteristics.

The determination of the distance of plant relocation is significant in the creation of a theoretical basis used to analyze this process. Two distinct ways of approaching this subject need to be considered depending on the distance associated with a given plant relocation. Pellenbarg (2010) suggests that long-distance relocations tend to be associated with large companies, often global companies, and need to be analyzed using Myrdal's theory of cumulative causation. This theory

assumes that assets or resources are shifted away from less developed geographic areas to more developed geographic areas and tend to concentrate there.

On the other hand, short-distance relocations tend to be associated with smaller companies and need to be analyzed in terms of the incubator hypothesis and its later modifications (Hoover, Vernon 1962; Leone, Struyck 1976). Thus far, no one has attempted to test this hypothesis with relation to events and processes occurring in Poland. The purpose of this paper is to determine the scale and key characteristics of plant relocation in major metropolitan areas in Poland with particular emphasis on fringe areas of metropolitan areas – especially rural communities. It is important to note that major metropolitan areas in Poland include very large areas still considered to be rural. The results of the research study made it possible to test some of the key assumptions behind the incubator hypothesis.

Research methods

There are several different ways in which a company may change its location, one of which may also lead to a change in corporate status. The spectrum of change does include many different options such as corporate mergers, hostile takeovers, branch establishment, and migration of an entire company or its headquarters to a new site. This type of relocation does not presuppose a change in corporate status, as would be the case with a merger or takeover. This paper focuses solely on companies that do move to a new location, but do not change corporate status.

The research was conducted in several stages:

a) Identification of all companies doing business in five major metropolitan areas

The first stage of the analysis focused on fringe townships¹ located across five major metropolitan areas² in Poland³: Krakow, Lodz, Poznan, Warsaw, Wro-

¹ Township – a basic (local) administrative unit in Poland. The Township Governance Act of March 8, 1990 (“Journal of Laws of the Republic of Poland” 1990, No. 16, Item 95) defines the township as a governed community as well as a specific territory. Three different types of townships have been designated by Poland’s government: rural townships, urban townships, urban-rural townships. Rural townships feature only villages or traditional European rural communities. Urban townships feature only cities. Urban-rural townships feature villages and at least one officially designated city.

² Experts from the Polish academic community including geographers, economists, and architects have defined the metropolitan area as “a major urban system that may be either monocentric or polycentric (multiple communities and other highly urbanized areas within a single system) and includes an area characterized by daily commutes to and from work as well as areas characterized by potential urban development and an adequate concentration of business and government functions supplementing those of the core city – along with substantial internal functional integration and a well-developed transportation network” (Markowski, Marszał 2006: 15).

³ Two major metropolitan areas were omitted: Upper Silesia, Tricity – Gdansk, Gdynia, Sopot. Both metropolitan areas are polycentric in nature, which makes it impossible to make good comparisons with monocentric metropolitan areas.

claw⁴ (Figure 1). This key step consisted of the identification of all operating business enterprises employing at least 10 workers, which had changed their plant or office location in the past. A similar type of identification was made in three core cities – Krakow, Wroclaw, and Poznan – with the key difference being that the companies had to employ 50 or more workers⁵. The latter identification process was facilitated via the use of a commercially available database – Hoppenstadt Bonnier Information – HBI, currently known as Bisnode Polska. The database contains telephone and address data for companies, which makes it possible to assign each company to a specific geographic area.

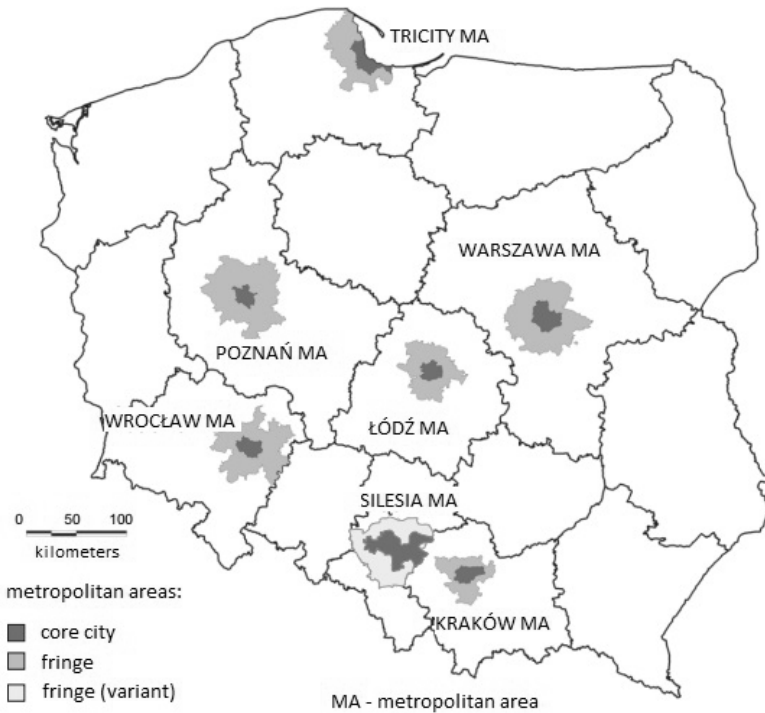


Figure 1. Major designated metropolitan areas in Poland in 2006

Source: Smętkowski, Jałowiecki, Gorzelak 2008

⁴ Metropolitan area delimitation by Smętkowski, Jałowiecki, and Gorzelak (2008).

⁵ Only three core urban areas were analyzed and only companies with fifty or more employees were analyzed due to the immense quantity of data associated with such analysis and the time constraints associated with this research study. Krakow, Poznan, and Wroclaw are treated as case studies of core cities located in major metropolitan areas in Poland.

A total of 6,240 companies⁶ were identified in the study area, which had fulfilled criteria described earlier. It is important to note that all designated metropolitan areas in Poland are covered by this study. This study is entirely focused on areas designated “metropolitan areas” by Smętkowski, Jałowicki, and Gorzelak (2008). This designation is quasi-official designation created in Poland for a variety of administrative purposes.

The HBI database is characterized by certain gaps in data. This basic problem was mitigated by also acquiring data from Poland’s REGON business register⁷ – data such as the number of companies based on size and geographic location (township). The use of both HBI and REGON data made it possible to show what percentage of registered companies in each studied township were identified in the study.

b) Scale of plant or headquarters relocation

The next step consisted of the acquisition of current and past business address data from Poland’s National Court Register (Polish acronym: KRS). Each of the 6,240 firms studied is registered with KRS⁸. Two relocation categories were selected – internal and external. The former applies to relocation within a township. The latter applies to relocation to another township. While both internal and external relocations were studied, the focus of the paper is on external relocations. This method was used to help identify companies that have moved from one township to another in five major metropolitan area in Poland. A total of 2,155 companies were identified that had at some point relocated to a different site and 1,158 of these had relocated to a different township.

The relocation analysis in this paper covers the period 2001–2013. The start date is also the date of the establishment of Poland’s National Court Register. The only data source that provided the most complete picture of company relocation in Poland was the Court Register. No other data source listed all address changes for all the studied firms. Hence, the paper analyzes address changes that have occurred since the Court Register began functioning in 2001, although many of

⁶ There does not exist a more complete source of business telephone and address data in Poland for a large number of administrative units. This type of data are available at local offices of the Ministry of the Treasury, but these data are usually not made available to researchers. In addition, each office is an independent entity and a permission to access data would need to be obtained from each office separately in order to cover a larger geographic area.

⁷ The REGON registry is a national business registration system in Poland. Its full name is equivalent to the National Business Registry and it is run by the President of the Central Statistical Office of Poland. The registry is constantly updated with new business registrations by a centralized computer system in Warsaw and regional computer systems in each of Poland’s 16 provinces (voivodeships).

⁸ The National Court Register (KRS), based on the Act of August 20, 1997 (“Journal of Laws” 2001, No. 17, Item 209 with amendments), is a mandatory registration system for business owners run by Poland’s Ministry of Justice and selected district courts. It serves as a national database of firms involved in economic activity in Poland.

the companies studied have a much longer history. In effect, all address changes for companies established in 2001 or later are analyzed in the paper, which also analyzes address changes for firms that had registered prior to 2001. However, the 2001 cutoff date means that some address changes are omitted in the case of companies with a longer history of operation.

c) Measuring company relocation distance

GIS software⁹ was used to map all address changes and calculate relocation distances.

d) Analysis of changes in the number of companies in fringe areas of major metropolitan regions

Changes in the number of companies in each studied township in the period 2002–2014 were used to supplement other data used to analyze plant relocation in fringe areas in major metropolitan regions in Poland. REGON data available on the website of the so-called Local Database managed by Poland's Central Statistical Office (Polish acronym: GUS) were used for this purpose. These data were obtained for the 2002–2014 period, as this is the only period they were available for.

Existing company relocation research on the local and regional scale

Plant relocation research has a relatively long history reaching the late 1940s. The history of this research field has been compiled in detail by Pellenbarg, Wissen, and van Dijk (2002) who provide a research timeline that begins with McLaughlin and Robock (1949) as well as Garwood (1953) and ends with fairly recent work by Louv (1996) and Pen (2000). The first papers on this subject focused on external problems such as labor costs, market size, and availability of raw materials (McLaughlin and Robock 1949; Garwood 1953).

Researchers later began to focus on key internal factors related to plant relocation (Luttrell 1962; Cameron and Clark 1966; Keeble 1968; Townroe 1972). Some work was also done on the effects of plant relocation on local and regional economies primarily in the United States and the United Kingdom. Data availability was one key factor in the research process in these two countries.

In the last twenty years, researchers have focused on so-called regional funding provided by the European Union and other large organizations and designed to be a political instrument whose purpose is to influence corporate geography. Research has also shown that sector-related issues prompt companies to relocate.

⁹ GIS – Geographic Information System – computer system used to enter, store, process, and visualize spatial data.

This is true most of all in the manufacturing sector, business services sector, and sales. Firms in these sectors tend to leave core cities and establish themselves in areas characterized by less intensive land use. Research has shown that manufacturing is one of the most mobile of sectors and tends to shift to urban fringes and suburban areas (Pellenbarg, Wissen, van Dijk 2002).

Researchers have also pursued analysis of long-distance and short-distance plant relocation as well as “mobility analysis” related to plant relocation or the effects of plant relocation (van Wee 1997; Broersma, Van Dijk 2001a, b; Ekamper, van Wissen 2000). More recent research has delved into issues such as decision-making processes, push factors, pull factors, and keep factors (Louw 1996; Pen 1999, 2000).

The most recent research on local and regional plant relocation is focused on issues such as the availability of jobs and the mismatch hypothesis (Fernandez 2008) as well as regional policy in relation to plant relocation (Ulltveit-Moe 2006) and innovation strategies of business enterprises (Sharif, Huang 2012). Some researchers also focus on the characteristics of the relocation of specific types of companies including R&D firms (Erken, Gilsing 2005). Some papers also cover plant relocation in the context of the ownership structure including companies operating in the public sector (Bárcena-Ruiz, Garzón 2009). However, the majority of research papers focus on international company relocation, which is not the subject of this study.

Older publications worth noting include those on the incubator hypothesis initially described by Hoover and Vernon (1962) and further developed by Leon and Struyk (1976). This hypothesis described the relationship between company characteristics and company tendency to relocate. The following are three main assumptions behind the incubator hypothesis: (1) younger companies tend to relocate shorter distances, (2) younger companies are more likely to relocate than older companies, (3) dynamic companies are more likely to decentralize than less dynamic ones (Leon, Struyk 1976; Pellenbarg 2010).

Also worth noting are factors mentioned by Pellenbarg, Wissen, and Van Dijk (2002) who suggest that certain company characteristics may be quite relevant in the plant relocation decision process and the distance of the relocation. Their research suggests that the manufacturing sector is less likely to relocate than the service sector due to higher sunk costs¹⁰. On the other hand, long-distance relocation may prove too costly for service companies who are likely to lose most of their employees. Labor costs are relevant in the plant relocation process. The paper also underscores the relationship between company size and its willingness to relocate. This relationship is accurate in the case of companies with less than ten employees, but does not appear to apply to larger companies.

¹⁰ Sunk costs are costs associated with a company's entry into a new market and may be described as barriers to entry. These include costs of permits and licenses, training costs, market research costs, costs of local agreements, and other irrecoverable costs linked with potential market exit.

Table 1. Basic plant relocation data for major metropolitan areas in Poland

Metropolitan area	Number of companies using REGON data		Number of companies based on HBI		Share of companies based on HBI data among companies by REGON data (%)		All relocated companies		External relocated companies		Share of relocated companies among all companies based on HBI (%)		Share of external relocated companies among all companies based on HBI (%)	
	10-49	50+	10-49	50+	10-49	50+	10-49	50+	10-49	50+	10-49	50+	10-49	50+
Krakow metro	1,321	255	198	131	15.0	56.0	64	47	37	42	32.3	35.9	18.7	35.9
Krakow city	4,685	1,114		892		80.1		333		86		37.3		37.3
Lodz metro	1,387	289	236	149	17.0	56.9	65	35	43	24	27.5	23.5	18.2	23.5
Poznan metro	1,953	466	553	330	28.3	12.9	197	109	139	84	35.6	33.0	25.1	33.0
Poznan city	3,925	883		754		85.4		232		63		30.8		30.8
Warsaw metro	4,515	907	1,113	606	24.7	13.7	388	176	278	137	34.9	29.0	25.0	29.0
Wroclaw metro	1,170	289	263	210	22.5	19.5	100	92	75	66	38.0	43.8	28.5	43.8
Wroclaw city	3,054	823		805		97.8		317		84		39.4		39.4

Note: In the case of central cities (Krakow, Poznan, Wroclaw), only companies with fifty or more employees were considered; in other geographic areas, companies with ten or more employees were considered in the study.

Company relocation in major metropolitan areas in Poland – scale and key characteristics

Company telephone and address information was compared with the number of companies registered in the REGON system in order to determine the level of data completeness for the studied sample. Many more companies were identified in the “50 or more” employee category than in other employment categories. In core cities, this category consisted of 52.7% of companies. The city of Wrocław set a record with 97.8% company address availability (Table 1). Values for Poznań and Kraków also exceeded 80%. Company address availability for the fringes of major metropolitan areas was poor and did not exceed 13% for the Poznań Metropolitan Area.

Data for smaller companies – those with 10 to 49 employees – were collected by omitting core cities. The results were much less satisfactory than in the case of larger companies – mean of only 21.4%. This means that plant relocation could be analyzed and described only with respect to about one fifth of smaller companies and one half of larger companies (50 or more workers) based on REGON data.

Companies located in major metropolitan areas in Poland are quite mobile. Of the 6,240 companies studied, as many as 2,155 or one third had moved to a different site at some point in the past. More than half of the companies – 1,158 companies – that had relocated had moved to a different township.

Plant relocation patterns vary spatially in terms of the number of migrating firms as well as their share in the general population of firms. The record breaker in this sense is the Wrocław Metropolitan Area, where as much as 43.8% of companies with fifty or more employees were found to have relocated from one township to another in the study period. The dominant pattern in inter-township relocation is that larger companies are much more likely to relocate than smaller companies. This is true in all the areas studied as part of this research effort.

This pattern holds true for all five studied major metropolitan areas, but it is the most vivid in the Kraków Metropolitan Area, where differences in plant relocation rates for companies with fifty or more employees and companies with fewer than fifty employees are significant at 17.2 percentage points. On the other hand, the most “embedded” firms are found in the Łódź Metropolitan Area, where the percentage of relocating firms (external relocations) is the smallest among the metropolitan areas studied. This statement applies to firms in both size categories – 18.2% of companies with fewer than fifty workers and 23.5% of companies with fifty or more workers.

A significant percentage of companies relocate more than once – 30% of all the studied companies found in fringe areas of major metropolitan regions in Poland had relocated more than once in the study period. Some companies relocated as many as five times or more in the study period (Figure 2). The highest

percentage of companies that relocated more than once were noted in the Wrocław Metropolitan Area, which suggests high business mobility in the region. The opposite trend was noted in the Kraków Metropolitan Area – 80% of the companies relocating in this area have only changed their location once in the study period.

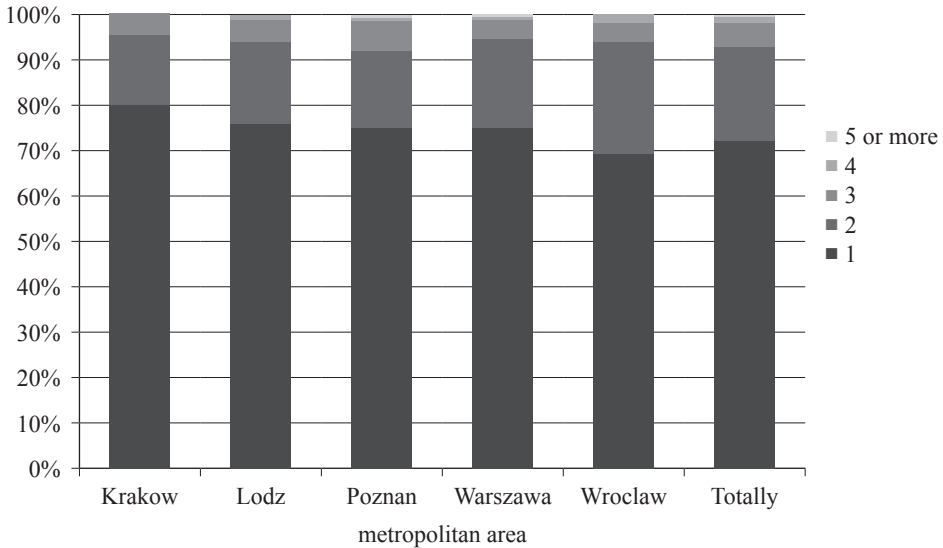


Figure 2. Percentage of companies based on their number of relocations in major metropolitan areas, analyzed without core cities

Note: relocation data for the years 2001–2013 only due to data availability issues

A company’s willingness to relocate depends on the nature of its business. Table 2 shows all business sectors versus “relocating” business sectors. The largest number of relocating companies belong to Sector G (sales), which also happens to be the largest sector. Despite this rather skewed pattern, it is still possible to infer that sales organizations are still more likely to relocate (25.1% overall, 29.3% of relocating companies) than other types of business organizations. Sector C companies were also found to be quite willing to relocate (industrial processing companies).

Their share in the study area is 27.9%, but their share among relocating firms is 30.5% (Table 2). One crucial explanation for this pattern is the specific conditions needed by these types of companies in terms of physical space as well as technical infrastructure. At the same time, the trend described by Pellenbarg, Wissen, and Van Dijk (2002) does not seem to hold in our study. The hypothesis put forth in this case was that service companies have lower sunk costs, and therefore, are more likely to relocate than manufacturing companies. Our research does not confirm this.

Table 2. Business sectors in the study area versus external company relocation

PKD section	Share of firms (%)	
	firms in the study area (in general)	firms after relocation/s
A and B	1.66	1.32
C	27.90	30.50
D and E	2.03	1.14
F	10.89	9.15
G	25.14	29.30
H	4.09	5.45
I, J, K, L	11.06	8.53
M	6.19	5.10
N, O, P, Q, R, S	7.42	4.75
Total	100.00	100.00

Note: relocation data for the years 2001–2013 only due to data availability issues.

According to the dynamic version of the incubator theory developed by Leon and Struyk (1976), as companies develop, they become increasingly less dependent on “incubation areas” and are able to meet their own needs. This decreasing reliance on the incubation area is paired with a growing need for physical space, which often determines a relocation to an area with a smaller population density. According to Leon and Struyk (1976), companies need to “rest” after one or two years of business operations (since establishment). Once this rest period is over, relocation becomes an attractive option. Younger companies are more eager to relocate, which is observed in the period between five and ten years following establishment.

Our research confirms this pattern of development. This is shown by the mean number of relocations by companies depending on their age (Figure 3) and the business sectors present in the study area in relation with year of establishment and the fact of relocation or no relocation (Figure 4). Both indicators confirm that the companies most likely to relocate are those established in the years 2000–2004 or less than ten years after the year of establishment – mean of 1.42 times; more than 20% of companies established at the time have relocated. Relocation is less likely among older firms and the youngest of firms, especially those established after 2010. This trend is consistent with the incubator hypothesis, as these youngest of companies have not yet reached a level of development that would allow them to relocate profitably.

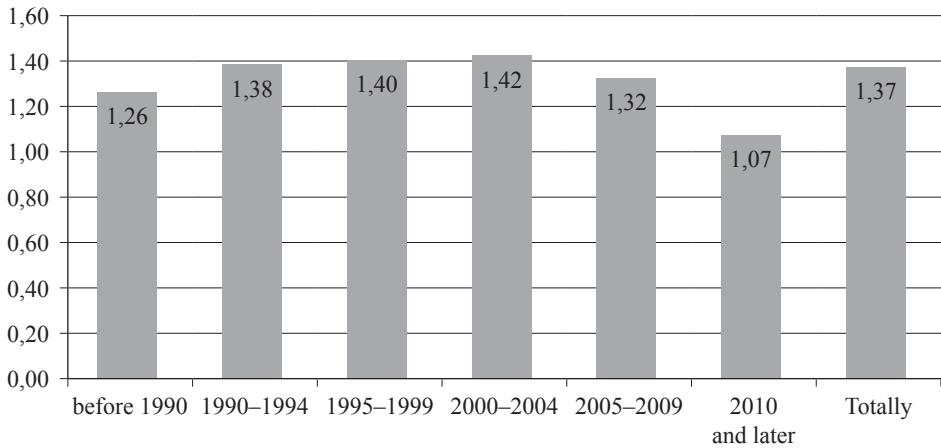


Figure 3. Mean number of relocations versus year of company establishment

Note: relocation data for the years 2001-2013 only due to data availability issues

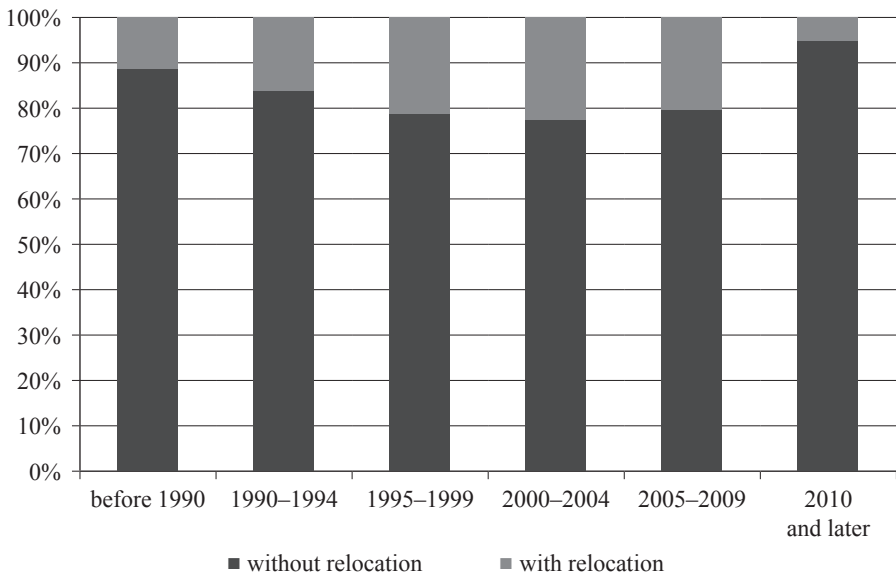


Figure 4. Business sectors by year of company establishment and external relocation

Note: relocation data for the years 2001-2013 only due to data availability issues

Another assumption behind the incubator hypothesis states that younger companies are more likely to relocate only over a short distance, which is designed to minimize risk and maintain existing business contacts despite the move to a brand new location. Familiarity with the local and regional environment is considered a valuable asset by many companies. This explanation is essentially

a behavioral analysis of company relocation based on the psychological notion that decision-makers wish to reduce risk by selecting familiar geographic regions for their economic activity (Lloyd, Dicken 1972: 157).

In order to test this assumption, the average relocation distance for every firm moving to a different township was calculated in this study. In the case of companies relocating more than once, mean relocation distance was calculated by dividing the total relocation distance by the number of relocations. Distances were calculated very accurately using GPS tools that make it possible to determine addresses with a high degree of accuracy. Next, the results were added and mean distances were calculated and placed into categories based on a company’s year of establishment (Figure 5).

This is a direct contradiction of one assumption of the incubator hypothesis. Research has shown that the younger the company, the larger the relocation distance. The oldest privately-owned companies in modern Poland whose history reaches the 1980s (some even older) relocated an average distance of 36 km. The next four groups of younger companies relocated increasingly farther distances: 51 km, 57 km, 61 km, 68 km. The most surprising finding was that the youngest companies (est. 2010 or later) tended to relocate over the largest distances – an average of 146 km¹¹. These can be classified as inter-regional relocations, which contradicts the general hypothesis stating that young companies seek out locations close to their site of establishment.

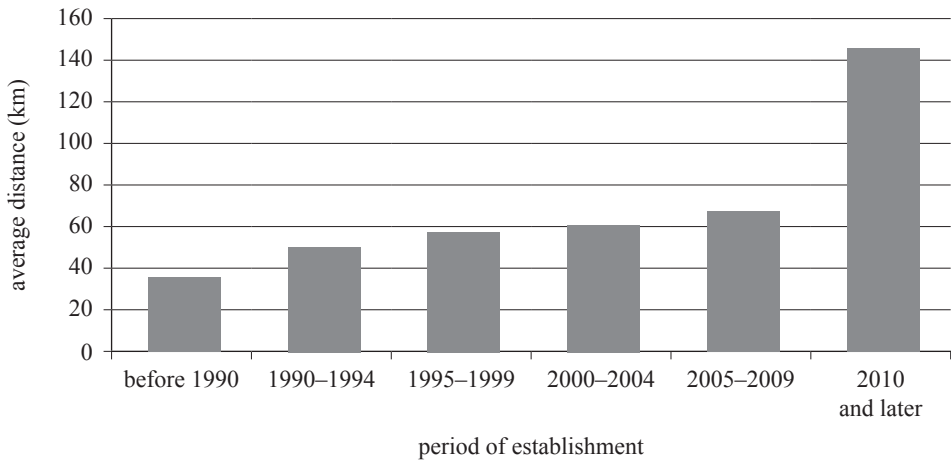


Figure 5. Mean company relocation distance versus year of company establishment

Note: relocation data for the years 2001–2013 only due to data availability issues

¹¹ This result does not constitute an error due to outliers. The largest relocation distance in the sample was 539 km and was associated with a company in a different age group. The standard deviations for each group shown in Figure 4 vary. The lowest value was 55.44 for the “before 1990” group. The highest value was 115.65 for the “2010 and later” group.

Relocation of companies to rural areas

Rural areas, especially those located near larger urban centers, possess certain key characteristics that attract investors. Theoretical approaches to business relocation in the context of the urban-rural continuum have touched upon various characteristics of rural areas and their ability to attract business enterprises.

Some of the relevant factors include behavioral issues (Törnqvist 1968; Lloyd, Dicken 1972: 157) that focus on familiarity with a given location as well as other issues analyzed in recent years – including the theory of flexible specialization and production and the associated “regulation theory” as well as the innovative milieu concept, network concept, and the concept of windows of locational opportunity. In addition, older theories pointing to the disadvantages of agglomeration and factors that work against agglomeration are also worth noting in this case. The latter can be described in terms of more space for investment purposes and lower land prices in areas situated away from the urban core of major metropolitan areas.

The number of companies in fringe areas of major metropolitan regions is on the rise in Poland regardless of the interpretation method adopted to analyze them. This is especially true of rural areas located in close proximity to major urban centers. The increase in the number of companies can be tracked using publicly available data.

REGON data for the 2002–2013 period show that the rate of change in the number of companies varied for different types of townships in major metropolitan areas in Poland (Figure 6). The rate of change for all five metropolitan areas was the largest in rural townships. This is especially true of businesses with fifty or more workers. The number of companies in this size category increased more than 70% in rural townships located across the Krakow and Wroclaw metropolitan areas in the study period.

A growth rate this high was not noted in any other group of townships in the study area except urban-rural townships in the Lodz Metropolitan Area. Stagnation and even decline in the number of companies were noted in large cities in the study area during the same period of time. All the studied cities except Warsaw lost companies in either one or both size categories. The city of Lodz is in the worst situation, losing about 17% of its large companies in the study period. Urban townships located in the fringe areas of major metropolitan regions experienced either stagnation or a small increase in the number of companies.

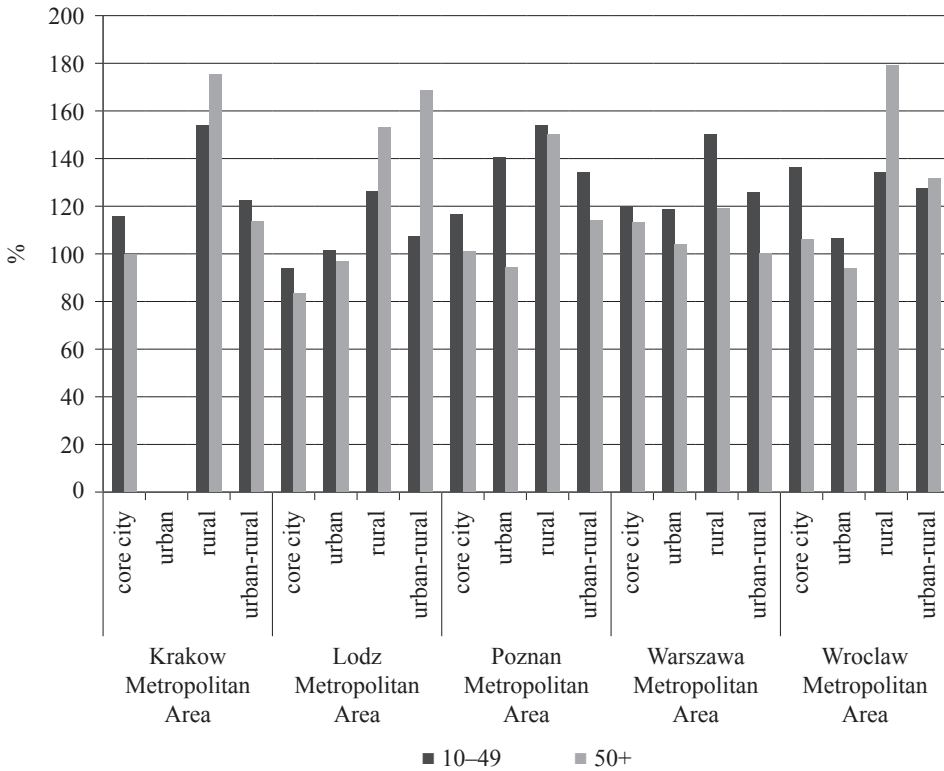


Figure 6. Rate of change in the number of companies registered in the REGON system in the period 2002–2013 in five metropolitan areas in Poland by township type

Source: author’s own work based on the Local Database of the Central Statistical Office of Poland

Table 3 and Figure 6 both clearly suggest a relationship between growth in the number of companies and the relocation of companies. The highest percentage of relocated companies was identified in rural areas in major metropolitan regions in Poland. The one exception is the Poznan Metropolitan Area. In the extreme case, relocated companies constitute more than 45% of all companies doing business in the Wroclaw Metropolitan Area (Figure 7).

This tends to undermine some of the assumptions behind earlier interpretations of company relocation within the urban-rural continuum, which had suggested that companies appearing in rural areas are not the same companies disappearing from urban core areas. The old interpretation stated that the migration of companies from urban to rural areas is mostly the result of spatial differentiation in industry, local changes in industry, plant relocation, as well as differences in the way businesses are established in rural and urban areas (Grzeszczak 1998, after Healey, Ilbery 1985).

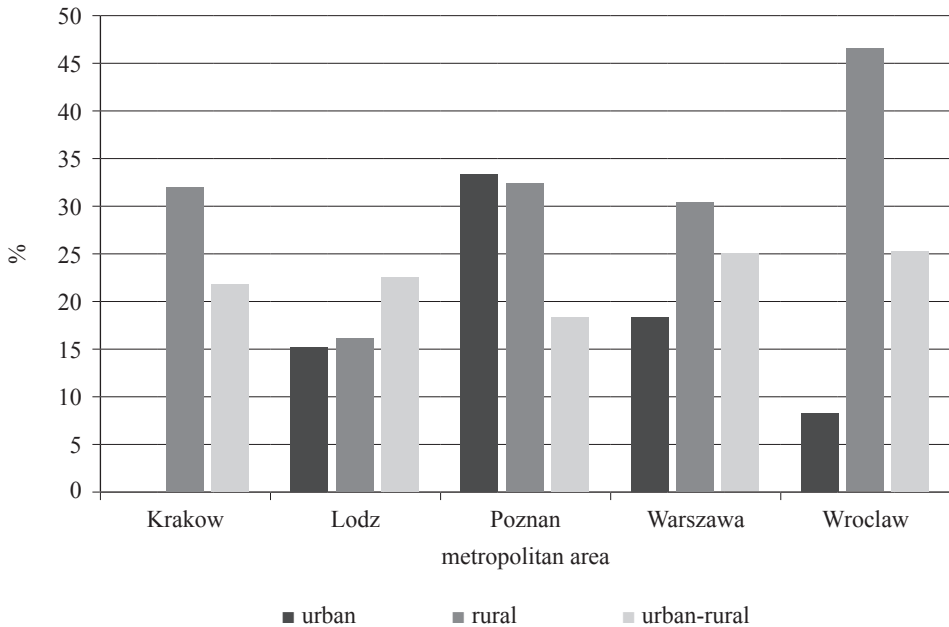


Figure 7. Share of companies relocating from one township to another in fringe areas of major metropolitan regions versus all existing local companies, by township type

Note: relocation data for the years 2001–2013 only due to data availability issues

Company relocation is traditionally not a spontaneous process, which tends to involve well-thought out decisions regarding plant site selection. Despite limits on economic information, company owners make decisions using mostly rational bases for relocation. This explains why some locations are more popular than others and distance itself tends to be of secondary importance. Figure 8 illustrates this point very well. It shows which locations within major metropolitan areas are deemed desirable by most companies wishing to relocate. An analysis of the characteristics of attractive rural townships makes it possible to evaluate local resources and their attractiveness to potential investors.

Special economic zones¹² are one local feature that makes some townships more attractive than others. In some cases, these are also called business activity zones. The Krakow suburbs of Zielonki, Liszki, and Zabierzow are examples of such zones. The city of Wroclaw also has its own suburban zones: Kobierzyce, Siechnice, Olawa. The city of Poznan also has a special suburban economic zone:

¹² Special economic zone (SEZ) – administratively distinct geographic area in a given country where business activity may occur under preferential conditions and any companies granted permission to operate in such a zone receive government assistance in the form of a tax break.

Tarnowo Podgorne. Some small towns in major metropolitan areas also offer tax breaks to potential investors: Katy Wroclawskie, Niepołomice, Konstanytown Lodzki. Features such as tax breaks, tax free periods, and technical infrastructure make special economic zones attractive to investors. As a result, more than half the companies in some townships are non-local companies. This is a reference to companies with ten or more workers.

New research has shown that the findings of Pellenbarg, Wissen, and van Dijk (2002) are quite accurate, as the business services sector is highly likely to relocate, especially to suburban areas and compact zones known as office corridors along key thoroughfares leading to cities. One example of this type of development is that of the rural township of Zabierzow located just west of Krakow.

In most townships that do not provide special incentives to investors, lower real estate prices in suburban areas represent a pull factor, as does investment land availability, good road access, and good transportation links with the urban core as well as other places important to business enterprises. Every studied area includes transportation links as an important factor, but the Warsaw Metropolitan Area is one example where this factor is extremely important. For example, four national roads intersect in Ozarow Mazowiecki Township, an urban-rural township near Warsaw. Another example is rural Raszyn Township, which lies at the intersection of national roads linking Warsaw with Krakow and Katowice.

In addition to the above key factors, company relocation is also aided by the investment climate in each given township, which evolves based on multiple factors such as macroeconomic conditions, national laws and regulations, national tax law, local economic considerations, local technical infrastructure, as well as institutional support (Investment 2004).

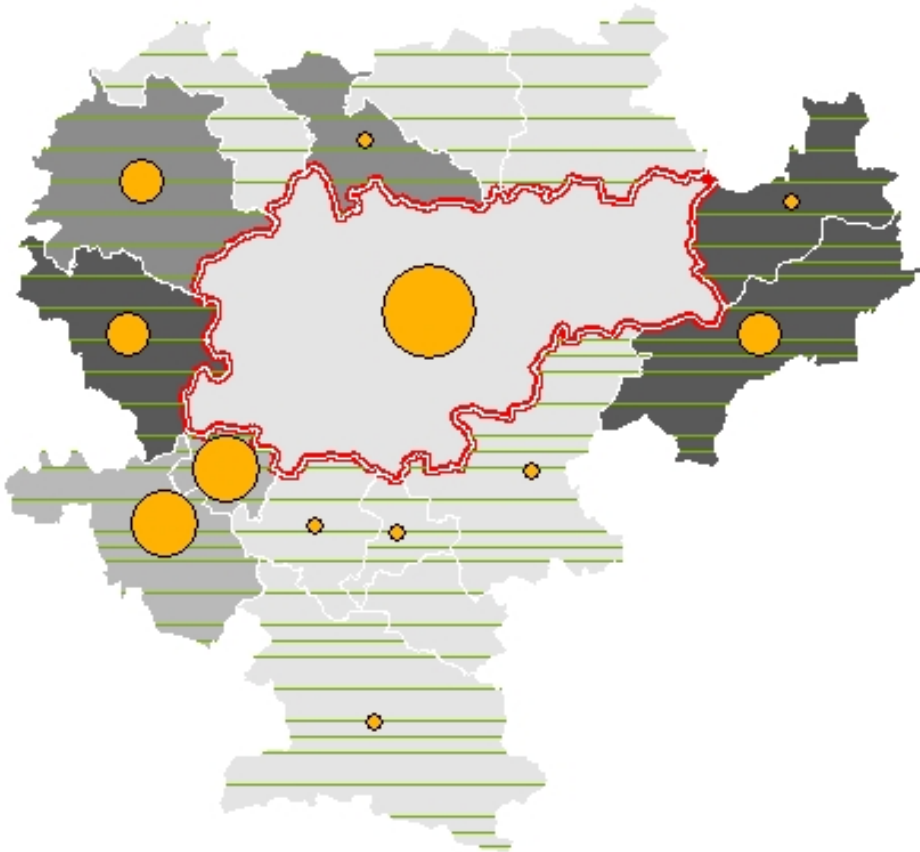
The newest publication on the investment climate in Małopolskie Voivodeship (Guzik, Gwosdz, Działek 2013) evaluates elements such as human capital, the labor market, transportation links, institutions, market potential, level of entrepreneurship, foreign investment, smaller firms that serve as direct or indirect suppliers to larger firms, residential attractiveness, the region's investment offering, and pro-investment efforts by local government officials. The publication ranked areas in the voivodeship in terms of ability to attract investors and the results were the following: (1) Krakow, (2) Skawina, (3) Zielonki, (4) Zabierzow. The latter two are suburban townships with a higher than average share of non-local companies – according to our research.

The investment climate can sometimes also make it fashionable to invest in a particular area and yields a copycat effect that reinforces existing investment areas. Yet another factor in company relocation is personal preferences – a factor that may not always be rational in nature, but can affect the decision-making process in some cases.

Table 3. Companies relocating from one township to another versus all companies in major metropolitan areas

Metropolitan area*	Central city of metro area			Fringe area of metropolitan area						Total					
	number of relocated companies	total number of companies	share of relocated companies (%)	urban townships			urban-rural townships			rural townships					
				number of relocated companies	total number of companies	share of relocated companies (%)	number of relocated companies	total number of companies	share of relocated companies (%)	number of relocated companies	total number of companies	share of relocated companies (%)			
Krakow external				0	0	0	56	257	21.79	23	72	31.94	329	79	24.01
Krakow city	86	892	9.64										892	86	9.64
Lodz external				33	218	15.14	25	111	22.52	9	56	16.07	385	67	17.40
Lodz city															
Poznan external				18	54	33.33	82	449	18.26	123	380	32.37	883	223	25.25
Poznan city	63	754	8.36										754	63	8.36
Warsaw external				104	569	18.28	175	701	24.96	136	448	30.36	1,719	415	24.14
Warsaw city															
Wroclaw external				7	85	8.24	55	218	25.23	79	170	46.47	473	141	29.81
Wroclaw city	84	806	10.42										805	84	10.43
Total	233	2,452	9.50	162	926	17.49	393	1,736	22.64	370	1,126	32.86	6,240	1,158	18.56

* In the case of central cities (Krakow, Poznan, Wroclaw), only companies with fifty or more employees were considered; in other geographic areas, companies with ten or more employees were considered in the study.



relocation of firms

number of relocations

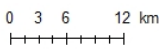
- ◊ 1-5
- 6-20
- 21-45
- 46-86

share of relocated firms (%)

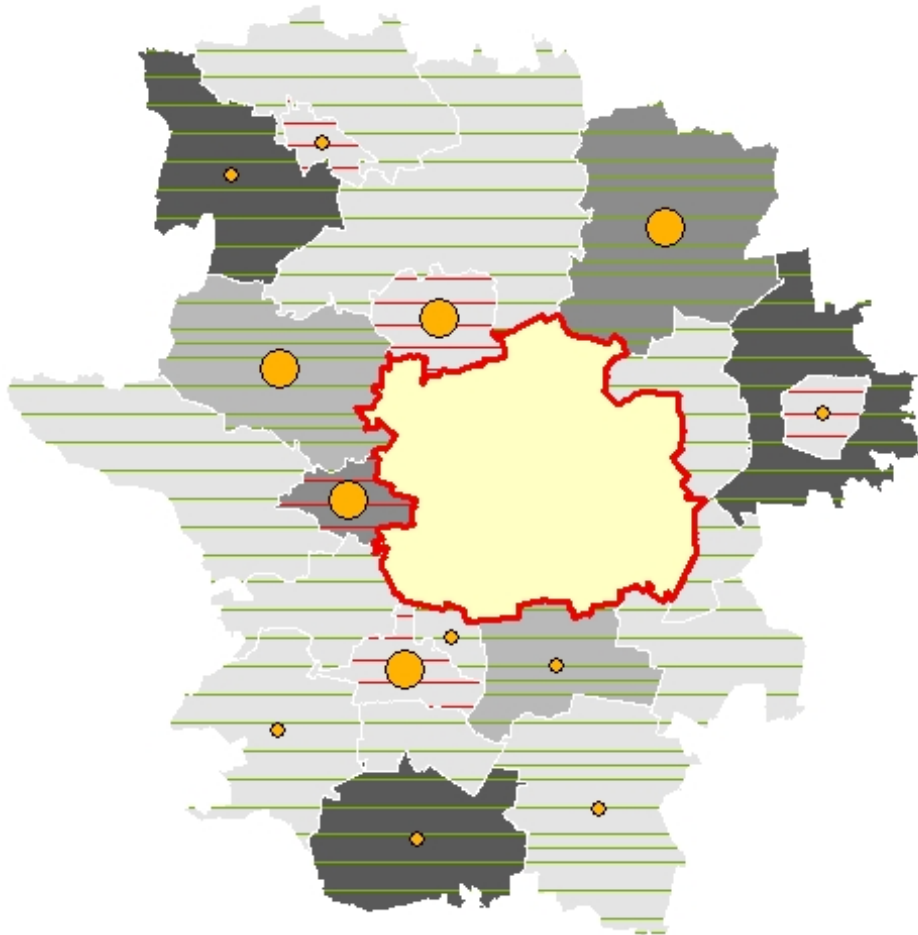
- ◻ < 15
- ◻ 15,1-30
- ◻ 30,1-45
- ◻ > 45

type of municipality

- ◻ core city
- urban
- urban-rural
- rural

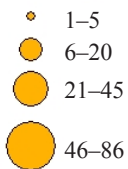


A. Krakow Metropolitan Area

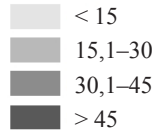


relocation of firms

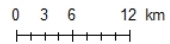
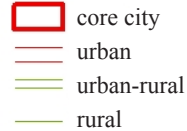
number of relocations



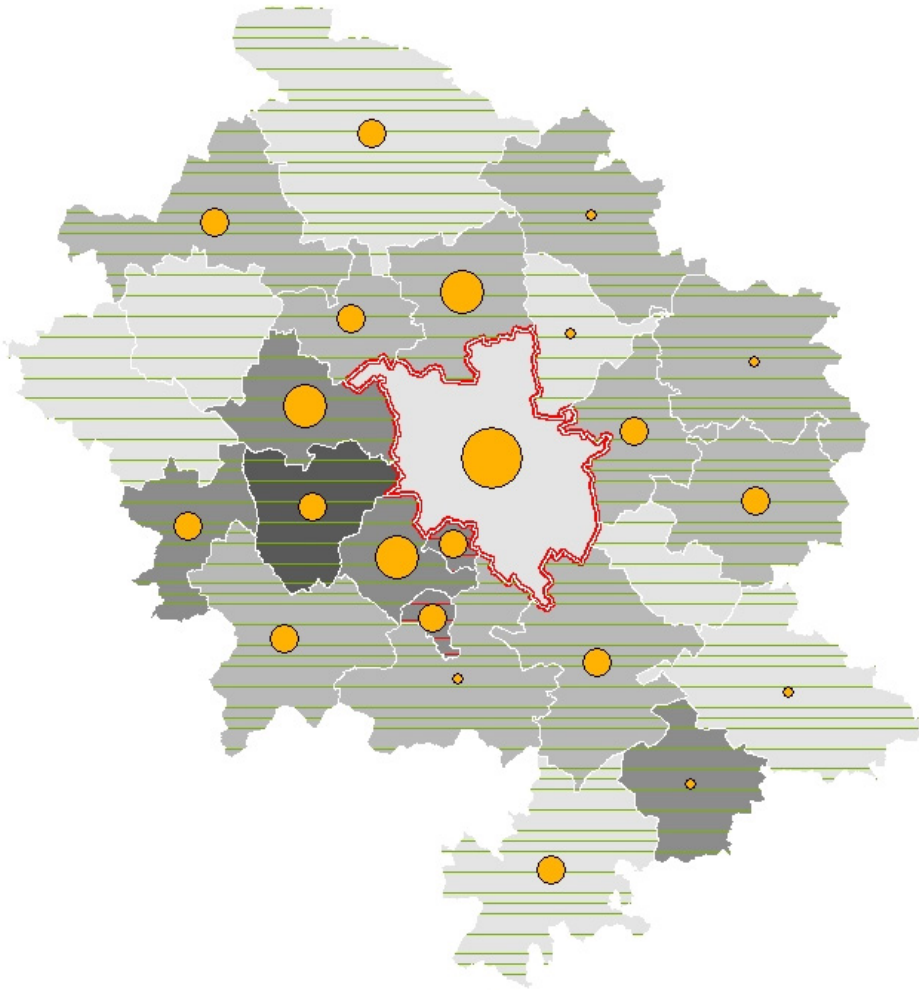
share of relocated firms (%)



type of municipality

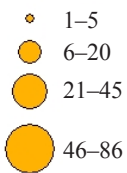


B. Lodz Metropolitan Area

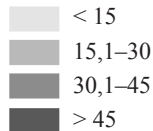


relocation of firms

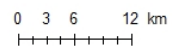
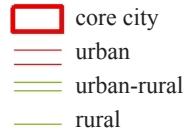
number of relocations



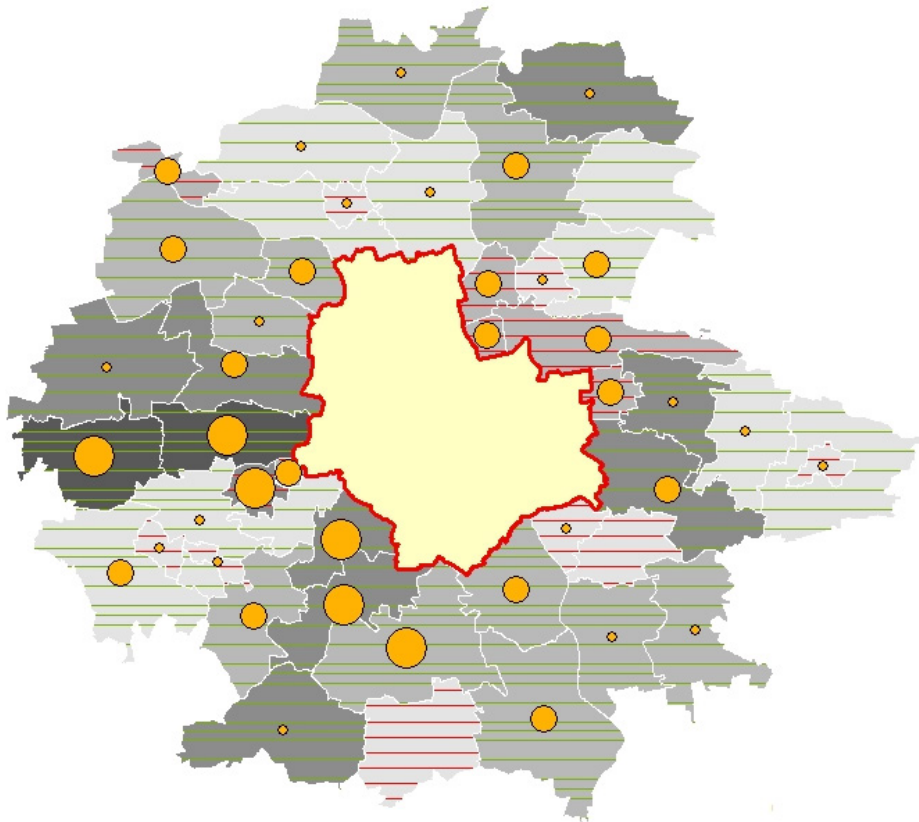
share of relocated firms (%)



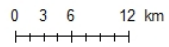
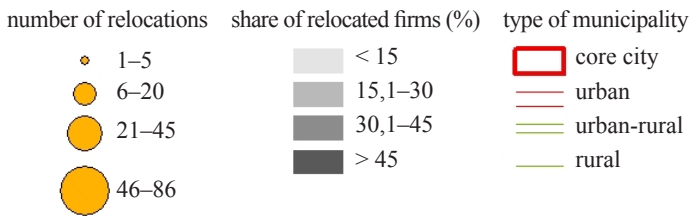
type of municipality



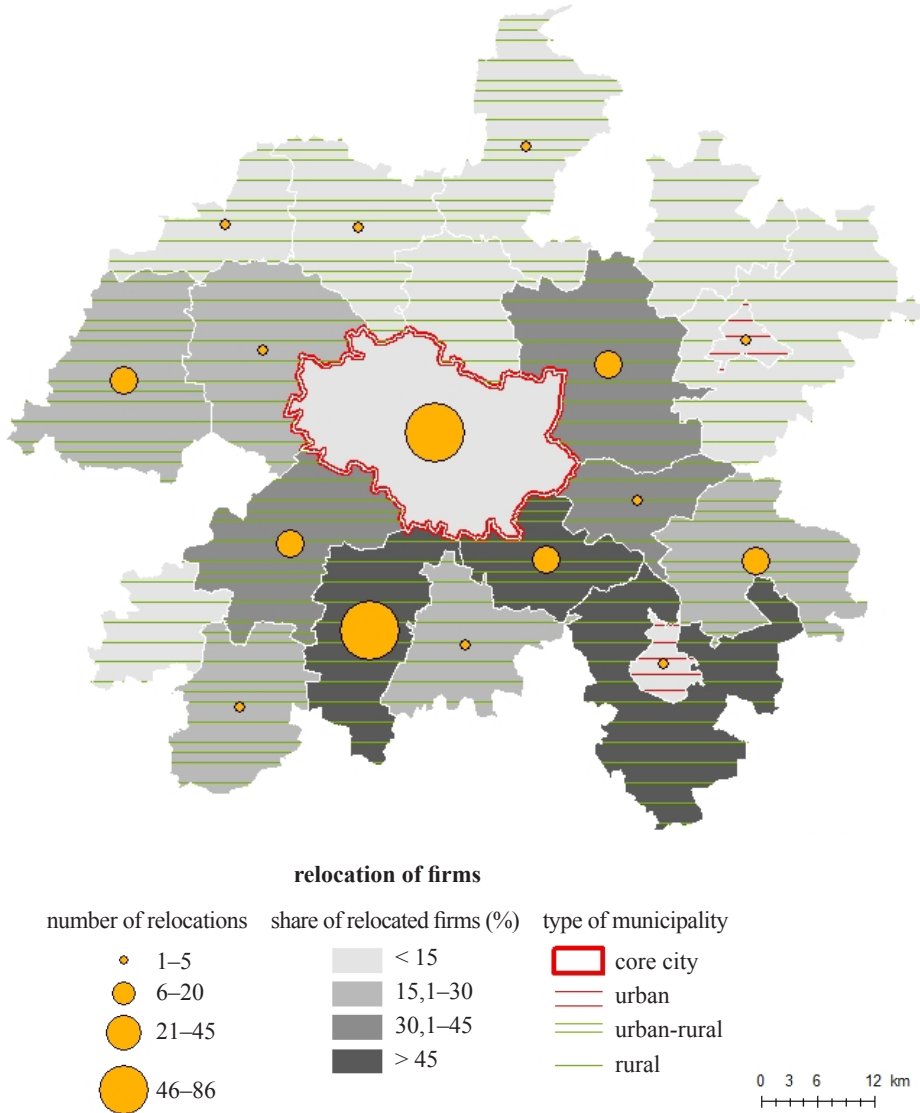
C. Poznan Metropolitan Area



relocation of firms



D. Warsaw Metropolitan Area



E. Wrocław Metropolitan Area

Figure 8. Number of relocated companies (external relocations) and their share in the total number of companies, by township type, in the following metropolitan areas:

A – Krakow, B – Poznan, C – Lodz, D – Warsaw, E – Wrocław

Conclusions

The relocation of business enterprises on a local, regional, and national scale is rarely discussed in the Polish research literature, and marginalized in the non-Polish research literature. Most research publications focus on global business relocations and most theoretical frameworks are developed for this type of shift. Concepts that describe company relocation on the lowest level such as the incubator hypothesis of Leon and Struyk (1976) are still invoked by some researchers (Pellenbarg, Wissen, van Dijk 2002), but this is not really part of mainstream work in economic geography.

Company relocation most often occurs in or near major metropolitan areas, which serve as excellent study areas for the analysis of the scale and pace of business relocation. Rural areas located in major metropolitan areas feel pressured to attract investors and experience significant change in terms of functional infrastructure. The pressure of suburban investment may be likened to the pressure exerted by suburban residential development.

The analysis of company relocation in all key monocentric metropolitan areas in Poland suggests that this process is very intensive and its intensity varies strongly from area to area. The influx of new companies in relation to existing companies is especially strong in fringe areas of major metropolitan areas. The case of the Wroclaw Metropolitan Area illustrates this point very well – nearly half of all companies with fifty or more employees in this area are relocated companies. At the township level, this share can be even higher, reaching 100% in some cases, which means that all the companies in a given size category are relocated companies and not new companies.

Research has also shown that it is larger companies (50 or more employees) that are more likely to relocate than smaller companies, which essentially contradicts one of the ideas conveyed by Pellenbarg, Wissen, and Van Dijk (2002: 29). Their research had suggested that companies with ten or more workers are either almost equally likely to relocate or smaller companies are more likely to relocate thanks to lower relocation costs (Caves 1998).

Research has also shown that the mobility of companies varies, as measured by the number of relocations per company, and this characteristic varies spatially. Companies least likely to relocate are those found in the Krakow Metropolitan Area, where only one out of five companies have relocated more than once. On the other hand, the most mobile companies can be found in the Wroclaw Metropolitan Area, where almost one out of three companies have relocated at least twice.

Company relocation depends on the sector of the economy. Some sectors are more likely to relocate than others. This is especially true of sales organizations and the processing industry. These sectors possess the largest share of relocating firms. There are two basic reasons for this: (1) the two sectors are heavily re-

presented in the overall economy of the studied regions, (2) the two sectors are above-average in the area of company relocation due to a strong drive to relocate. Companies in the C and G economic classification categories (sales and processing) constitute 60% of all firms relocating in the study area.

The study made it possible to evaluate two assumptions behind the incubator hypothesis (Leon, Struyk 1976). The hypothesis that the tendency to relocate is linked with company age has been confirmed, with the strongest drive to relocate associated with companies several years past their date of establishment. The largest share of companies relocating to a different place in major metropolitan areas in Poland (over 20%) has been noted among companies established in the years 2000–2004. The share for both younger and older companies was markedly lower, which confirms the hypothesis that relocation decisions are made several years following company establishment when the business has achieved a certain level of stability, but at the same time needs to find the right conditions to accelerate growth.

However, our research did not confirm the second assumption behind the incubator hypothesis, which states that relocation distance is linked with company age (young companies relocate over short distances). Our research has shown that the youngest companies are relocating the largest distances and mean relocation distance declines with company age.

Research has shown that the highest rates of change in economic activity are noted in fringe areas of major metropolitan areas in Poland. This is especially true of rural townships, which have experienced a large number of business registrations in recent years. Some of these new businesses are new companies, but most are firms relocating from other parts of the metropolitan area including the urban core. Hence, urban core regions are currently experiencing stagnation, and in some cases decline, as is the case with the city of Lodz. The attractiveness of rural townships located in close proximity to major urban areas results from a combination of different factors.

Some of these factors are the same for all townships and include lower than in core cities real estate prices, higher availability of land for investment purposes, and less human impact on existing infrastructure. Some factors are specific to some townships and include special economic zones and special business zones as well as location in areas close to major highways, airports, and metropolitan ring roads.

In addition, some townships attempt to attract investors using frequently difficult to evaluate incentives such as special contacts in local government, reduced paperwork, and image-generating marketing programs. All of these “soft” incentives produce a positive investment climate in a given township. The accumulation of certain aspects of pro-investment policy in townships such as Zabierzow and Zielonki near Krakow, Tarnowo Podgorne near Poznan, as well as Kobierzyce near Wroclaw yields robust economic zones that no longer resemble the formerly rural character of each area.

Our research suggests that a company's decision to relocate is most often based on internal factors such as company size, sector of the general economy, and phase of the company lifecycle, but also external factors associated with the general business environment (e.g. push factors and pull factors linked with potential new locations). However, more qualitative research is needed in order to properly analyze motives behind the relocation of the studied companies. This new research work is already underway.

Acknowledgment

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Adam Czarnecki, PhD

Institute of Rural and Agricultural Development

THE CHANGING ROLE OF SMALL TOWNS AS SALES AND SUPPLY MARKETS FOR RURAL HINTERLAND

Introduction

The role of small towns as a development facilitator for rural areas has been under constant change, with the deepest and most far-reaching having been observed over the past three decades (Allen & Weber 2007; Mitchell 2008; Besser 2009; Halseth & Meiklejohn 2009). Similarly to metropolitan or rural areas, small towns are influenced by globalisation, outsourcing of service and manufacturing jobs to low-wage countries, industrialisation of agriculture, large-scale economic and functional changes, increasing social inequalities, service restructuring and negative demographic tendencies (Kresl & Singh 1999; Falk & Lobao 2003; Jazewicz 2006; Halseth & Ryser 2007; Besser 2009) as well as threats stemming from the deterioration of the natural environment and landscape changes, although the latter are usually not so intense as in heavily urbanised regions. Many small towns have successfully adapted to the ongoing socio-economic transformations, taken on new challenges and assumed new roles (Brennan et al. 2005), whereas others are in crisis, being unable to take advantage of the new opportunities, experiencing absolute decline and relegation to "ghost town" status (Mattson 1997; Collits 2000; Nel et al. 2011). Unfortunately, unlike rural and metropolitan areas, small towns are often not considered a policy issue by decision-makers, and so they are not regarded as a priority concern in national and regional policies and development strategies (Simon 1992; Harrison-Mayfield 1996; Collits 2000). In the traditional view, decision-makers and politicians commonly trivialise the multi-directional and multi-faceted relationships between small urban centres and neighbouring rural areas, assuming that these only concern production and trade. According to Lindley, "policy recognition for this 'middle ground' between the sparsely populated rural agenda and that of the city/metro region has been insufficiently developed to date" (Lindley 2009: 4).

Hence there is a pressing need to support the socio-economic revival of struggling small towns through local empowerment, reinforcement of endoge-

nous small-town resources, social capital and civic engagement and, as a result, to enhance linkages between them and their rural hinterland. There are a number of reasons to strengthen the external functions of small towns, among which the following should be mentioned: the maintenance of cultural identity, protection of the agricultural sector (or primary activities in general) as well as the integration and coherence of local systems in various aspects (Vaishar 2004; Heffner 2005; Bole & Nared 2009; Zamfir et al. 2009). At the same time, the aim of building “strong, coherent local communities”, which often comes up in the present debate on the future of rural areas (Barker & Selman 1990; Morris et al. 2001), must take into consideration the complexity of relationships between the social, economic and environmental spheres. This could definitely foster the introduction and fulfilment of the idea of sustainable development of small towns and their rural hinterland. With decent institutional support, the new way of thinking about towns (including the redefinition and reconfiguration of local resources) as well as the regeneration of distinctive values and characteristics that they still retain (local jobs, the low level of deterioration of the natural environment, often good access to open and green spaces, and, at the same time, the opportunity for a tranquil and non-stressful life) (Paquette & Domon 2003; Aguiar et al. 2005; Heffner 2005; Heffner & Solga 2006; Spasić & Petrić 2006; Borcz et al. 2009), may turn out to be the main factor that attracts both external investors and new inhabitants, and in the longer perspective could become a solid foundation for the revival of small urban centres.

In light of the above, the main objective of the paper was to assess the significance of small towns as sales and supply markets for rural businesses. It was a qualitative study merely of the existing economic linkages established by rural enterprises (excluding farms) and their counterparts as well as public institutions, farms and individual consumers from small towns. The main source of statistical data was statements and opinions provided by rural business owners in direct interviews.

Economic linkages between small towns and the rural hinterland

Small towns have traditionally been seen as an integral part of a well-functioning agricultural sector, and more generally of the rural economy (Heffner 2005; Li & An 2009; Mayfield et al. 2005; Zamfir et al. 2009). They constituted an important source of inputs for agriculture and (because of the nearby location and relevant facilities) the primary “natural” place for processing agricultural output as well as the place for rural households to purchase everyday consumer goods and basic services. There is therefore no doubt that urban-rural (small town-rural hinterland) relationships have not been one-way (entirely from towns towards the surrounding countryside), but have been based on the two-way flows of human, material and immaterial resources.

Small towns can still play a role of “transmitters” at least for some rural products (raw materials, agricultural produce, other goods and services offered by farms and rural enterprises) which eventually reach external markets – regional, national and international. At the same time, services and processed goods, including imported products, are distributed in the opposite direction. These flows also include population movements, either daily commuting (to work, school and of other purposes, i.e. less frequently use of services and related facilities) or permanent or temporary migrations. Flows of information mainly include the data on job offers/opportunities in a small town and also market tendencies, ranging from changes in the prices of products and services up to consumer expenditure patterns and preferences. In turn, the components of capital flows are usually funds from/to migrants to/from their relatives living in rural areas or as a result of commercial transactions or loans and credits (financial support) to rural people from urban financial institutions. These types of relationships have their own spatial dimension and consist of overlapping mutual flows between economic sectors and distinct industries, both at the household and enterprise levels (including farms and non-agricultural businesses). The “transmitter” function also includes the spread of ideas, innovations, consumption patterns, behaviour, lifestyles and other “added” values created in urban centres/key growth poles (Hinderink & Titus 1988; Pedersen 1997). In some types of functional regions and economies, small towns constitute an important link in the diffusion of innovations, thus enabling and facilitating the dissemination of “novelties” in rural areas. One can therefore regard a small town as a “meeting place” of rural and urban/metropolitan economic activities (usually from outside the region) (Xuza 2006).

According to many researchers, small towns are still a significant labour market for the rural non-farm population (Rondinelli 1988; Gaile 1992), or act as its services centres, thereby reducing the dynamics of rural exodus (depopulation) and alleviating its negative socio-demographic effects (Hinderink & Titus 1988; Ebrahimzadeh et al. 2012). The concept of “urban functions in the rural development” (Rondinelli & Ruddle 1978; Belsky & Karaska 1990) has made a significant contribution to the perception of small towns as the primary places to provide services and facilities for their rural surroundings. According to this idea, the most effective and most rational spatial policy was based on the integrated and sustainable urban system as well as on the (urban) settlement hierarchy. In this approach, the urban network of small, medium-sized and large centres was described as “[...] ‘locationally efficient’ – it allows clusters of services, facilities and infrastructure that cannot be economically located in small villages to serve a widely dispersed population from an accessible central place” (Satterthwaite & Tacoli 2003: 12)¹.

¹ This view, however, has been questioned by researchers claiming that low consumption rate by farms, rural residents and enterprises is rather the result of social inequalities (disparities in income and earning ability between urban and rural people), more than of poor access to services and goods (Hardoy & Satterthwaite 1986; Pedersen 1997; Simon 1992).

Small centres can also play a significant role in boosting agricultural production, which, in consequence, leads to an increase in rural incomes associated with the primary sector. What induces the growth, efficiency and quality improvement in production is the town residents' demand for agricultural output and their supply of means of production (inputs for farming activity). At the same time, the increase of rural incomes contributes to stimulating the demand for "urban" goods and services, which in turn boosts and develops the economy of small towns. Among other symptoms, this is reflected in rising employment and income levels of town residents (Hinderink & Titus 1988; Evans 1989; Simon 1992). Another positive effect of the close economic relationships between small towns and their rural surroundings is that farmers (and their families) tend to invest income generated from the sale of agricultural produce in some non-farm activities, such as setting up their own business in the nearby small town (Van den Bos & Helmsing 1998; Hoang et al. 2008; Satterthwaite et al. 2010). Numerous advantages, including the well-developed technical infrastructure, business environment, institutional support and the size and professional quality of local labour resources as well as cooperation opportunities and many stable linkages with important urban nodes or, in general, external markets favour this as a location of economic activity.

In recent years, the scope and strength of relationships between small towns and their rural hinterland have been significantly changed by the processes of social, economic and cultural transformation on the global, regional and local scale, including the progressive decline in agricultural production together with a reduction of employment in the entire primary sector (Champion 1989; Marsden et al. 1993; Dewar 1994; Courtney et al. 2007, 2008). As an exemplification of the effects of the loss in farm production one may observe a significant decrease in the level of consumption of goods and services by the (mostly agricultural) rural population (Heffner 2005). The liberalisation of trade and production, resulting in the increased availability of cheap imported foodstuffs, has created new patterns of consumption among urban and rural populations. It has led to small family businesses using traditional, low-efficiency technologies and simple means of production being crowded out from the local market. In the opinion of some researchers, involving local economies in supply chains at the national and international levels, can in turn take place more or less spontaneously, but most often it can occur without the participation of "transmitters" – e.g. (the nearest) small town (Altman & Rosenbaum 1975; Pedersen 1997; Tacoli 1998; Owusu 2005). As a result, the "small town-rural area" relationships are weakened in favour of the direct "large city/metropolis-rural area" linkages.

Transport and communication, which were once one of the main city-forming factors, along with the development of modern information technology have enabled the new spatial mobility patterns to emerge. These consist, at least, of rural residents' increased access to some external trade and service markets

(e.g. in regional centres, central nodes, metropolitan and suburban areas). In turn, the new patterns of mobility have made it possible for rural people, who have begun to have easier access to the wider range and high quality of products and services at more competitive prices, to follow new consumption preferences. This has resulted in by-passing small towns in favour of urban nodes ranked higher in the urban hierarchy (Hinderink & Titus 2001). In addition, wholesale trade and distribution centres in major cities or in their more easily accessible surroundings create favourable conditions for the sale of agricultural produce on a larger scale (by satisfying the needs of a bigger and wealthier market). The small towns are bypassed not only by individual consumers but also by large companies, who have numerous trans-regional or trans-national linkages and are looking for locations for new branches, offices etc. (Evans 1992). The weakening of the socio-economic relationships between farming/rural and small-town communities undermines the foundations of well-functioning local systems (including small towns and their immediate rural surroundings). As a result, it threatens economic liveliness and diminishes social resilience within the local systems.

Studies on small urban centres confirm the thesis that their prosperity greatly depends on the character of the area being serviced (e.g. rural hinterland), which at the same time significantly influences the development possibilities of exogenous/supra-local functions of a small town. It is assumed that the scope of functional diversification of a small town depends on the development level and economic performance of its rural surroundings, not the reverse (Hinderink & Titus 1988; van den Bos & Helmsing 1998), and that “especially small towns, if it concerns manufacturing and services, focus mainly on meeting the needs of the surrounding countryside, rather than on the service of their own, minor communities” (Chądzyńska 2005/2006). Thus small towns’ provision of external/supra-local activities and services providers falls under the concept of exogenous or non-basic functions used in economic base theory. According to its key assumptions, urban development (including small urban centres) which is reflected in a town’s prosperity and, consequently, in boosting the development of its rural surroundings, depends on the growth and diversification of exogenous functions, although its persistence depends on endogenous/supplementary (locally oriented) economic activities.

Research concept

The research concept and its methodological framework generally refer to the UE project “The Role of Small and Medium-sized Towns in Rural Development” (MARKETOWNS) conducted partly in the Institute of Rural and Agricultural De-

velopment of the Polish Academy of Sciences from 2001 to 2004 within the 5th Framework Programme².

For obvious reasons, the scope of this study was more limited, given that the main research objective – to assess the significance of small towns³ for rural businesses – has been retained, but existing economic relationships were considered in a less comprehensive and detailed way, and examined using for simpler technique. It was a qualitative study of merely the existing economic linkages established by rural enterprises (excluding farms) and their counterparts as well as public institutions, farms and individual consumers from small towns. What is particularly important is that the attention was only on the (frequency of) incidence of individual and commercial customers/consumers from small towns in the spatial structure of trading partners, without taking into account the economic dimension of the relationships examined, i.e. in terms of the amount of money or the amount of goods or services sold/purchased.

The main source of statistical data was the statements and opinions provided by rural business owners in direct interviews. The interviewees were asked to identify places of provenance (names of towns, cities and communities) of their suppliers (enterprises supplying raw materials, commodities and means of production, or other goods and services), consumers (individual and commercial customers who bought the goods and services offered) and cooperators. Respondents aimed to indicate five locations of the main suppliers, consumers and cooperators. In this way it was possible firstly to obtain the (spatial) structure of trading partners of the enterprises surveyed, and secondly, to define the position of small towns in the network of economic relationships as well as to make an assessment of their significance for rural areas as far as sales, supply and cooperation markets are concerned.

Besides the examination of economic linkages, it was of a particular importance to demonstrate how research results (respondents' statements and views) differed/were influenced by some selected key variables, including business owners' basic socio-demographic characteristics (age, education), enterprise charac-

² “The aim of this project was to focus on the role that small and medium-sized towns play in rural development and to measure the economic linkages between such towns and the surrounding countryside, in order to assess their present and potential role as growth poles” (Mayfield et al. 2005: 1). The research project was based on identification and measurement of economic relationships in terms of flows of goods, services and labour resources between farms, non-agricultural enterprises as well as farm and non-farm households in a sample of small and medium-sized towns and their surrounding countryside. Thus it was possible to make comparisons between the degree of local economic integration of different types and size of towns, farms, firms and households located in the communities surveyed.

³ In Poland the most commonly used upper threshold value for the category of small towns is 20 000 inhabitants (Parysek 2002; Kwiatek-Sołtys 2004; Zuzañska-Żyśko 2007), although other thresholds – of 5 000 (Chojnicki & Czyż 1989; Szymańska 1992; *Kierunki Rozwoju Obszarów Wiejskich* 2010) and 10 000 people (Szlachta 1980; Bagiński 1998) – also appear in scientific papers, policies and strategic documents at various territorial levels.

teristics (size – number of employees, business industry), business location characteristics (region, administrative status of the community, size of the settlement) and other additional factors.

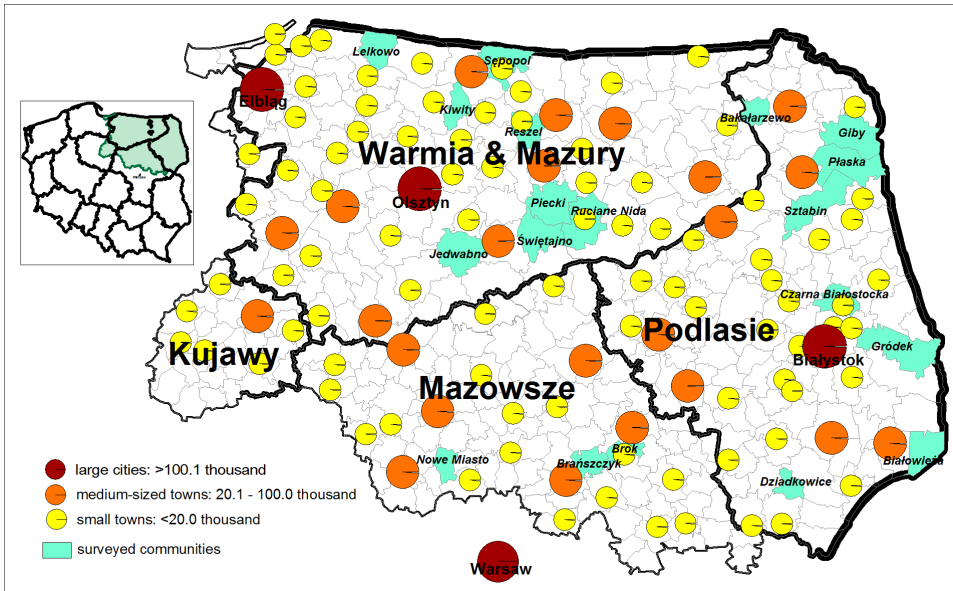


Figure 1. Spatial distribution of communities and small towns surveyed (according to size) in the “Green Lungs” region of Poland

Source: own study

The survey of 284 local entrepreneurs (owners and co-owners of non-agricultural businesses) in 19 selected communities in north-eastern Poland, in the “Green Lungs” functional region (Figure 1) was carried out in May and June 2009. The main criterion to select the population surveyed was the business/industry (according to Polish Classification of Economic Activities (PKD)), thus it was possible to apply the stratified sampling method in order to reflect the existing structure of business entities in all the communities surveyed.

Results

In light of the research outcomes, small towns considered as trading partners, were of a minor importance for rural enterprises, given that only 28.9% of the surveyed mentioned small urban centres as one of the supply, sales or cooperation markets (see Table 1). Sales of goods and services to individual and commercial

Table 1. Economic relationships between rural enterprises and their individual and commercial customers as well as suppliers and cooperation partners located in small towns

	Sales to small towns		Purchases in small towns		Cooperation with small towns		All kinds of relationships with small towns (sum of relations)	
	No.	%	No.	%	No.	%	No.	%
Enterprises in total	52	18.3	41	14.4	6	2.1	82	28.9
I. Enterprise/business location								
Administrative status	18	8.7	29	14.0	3	1.5	39	18.8
	34	44.2	12	15.6	3	3.9	43	55.8
Region	7	14.3	1	2.4	4	8.2	11	22.5
	18	15.8	18	15.8	–	–	28	24.6
	27	22.3	22	18.2	2	1.7	43	35.5
Settlement	35	21.0	15	9.0	6	3.6	49	29.3
	17	14.5	26	22.2	–	–	33	28.2
II. Enterprise characteristics								
Size (number of employees)	41	17.4	37	15.7	4	1.7	68	28.8
	11	26.8	4	9.8	2	4.9	14	34.2
	–	–	–	–	–	–	–	–
Economic profile (according to the Polish Classification of Economic Activities (PKD))	2	10.0	1	5.0	2	10.0	5	25.0
	6	16.7	7	19.4	–	–	11	30.6
	2	10.5	4	21.1	–	–	4	21.1
	25	22.3	15	13.4	2	1.8	38	33.9
	2	6.7	2	6.7	–	–	4	13.3

	Transport	2	16.7	1	8.3	1	8.3	2	16.7
	Basic social services (education, health care, finance and insurance)	3	33.3	2	22.2	-	-	4	44.4
	Other	10	21.7	9	19.6	1	2.2	14	30.4
Owner's opinion about enterprise current economic situation	Gets better	14	19.2	12	16.4	-	-	23	31.5
	Gets worse	11	11.2	10	10.2	2	2.0	21	21.4
	Stable	27	24.1	19	17.0	4	3.6	38	33.9
Main location factor (according to the owner's opinion)	Owner's permanent place of living in the same community	43	22.5	25	13.1	4	2.1	58	30.4
	High transportation accessibility	2	18.2	2	18.2	1	9.1	5	45.5
	Cheap workforce	-	-	2	28.6	1	14.2	3	42.9
	Access to the natural resources	1	9.1	-	-	-	-	2	18.2
	Other reasons	6	12.2	11	22.5	-	-	14	28.6
III. Entrepreneur's characteristics									
Age	Mobile working	19	17.4	22	20.2	2	1.8	34	31.2
	Non-mobile working	25	16.1	15	9.7	4	2.6	38	24.5
	Post-working	4	33.3	2	16.7	-	-	5	41.7
Education	Primary and basic vocational schools	16	23.9	14	20.9	1	1.5	27	40.3
	High school	22	14.7	20	13.3	3	2.0	36	24.0
	University	13	25.5	6	11.8	2	3.9	17	33.3
Runs a farm business	Yes	17	22.4	19	25.0	3	4.0	31	40.8
	No	35	16.8	22	10.6	3	1.4	51	24.5

Source: own study.

customers (e.g. enterprises, public institutions, farms etc.) were declared by only 18.3% of respondents, while supplies of raw materials, goods, technologies and services by 14.4%, and cooperation with the small towns' companies – by only 2.1% of the surveyed.

Among all types of surveyed relations, the strongest were these which, at least theoretically, have the most beneficial influence on rural enterprises and, in a wider perspective, on local economy: the flow of goods and services to the small town and the flow of funds/capital resources towards rural enterprises/areas. Thus, through providing external customers/markets with goods and services, rural businesses not only increase their income but also abilities to contribute positively (although in a more indirect way) to the local development (including rural households income and quality of life as well as socio-economic potential of the community). However, it does not change the fact that small towns' position in the hierarchy of economic relationships of surveyed enterprises was rather insignificant, and in case of a few communities – marginal or even non-existent, especially in terms of cooperation.

For the majority of respondents (65.8%) the key partners in trade exchange were commercial and individual customers from medium-sized towns and large cities. Among them, large urban centres (over 100 000 inhabitants) were the most attractive place for the surveyed in terms of supply with goods and services (51.8%), sales (23.6%) as well as cooperation with other companies (15.5%).

At the same time, stronger relationships of rural enterprises with small towns (often located nearby), rather than with the larger urban centres in the field of sales performance, make us believe that they created some kind of functioning pattern. It means, on one hand, that they supply themselves on larger urban markets that usually offer more diversified range of products and services, higher quality and competitive prices. In return, they mostly meet the local needs, selling goods and services mainly to individual and, significantly less often, to commercial customers from the same community. Thus, this scenario leads to serious negative impacts on local economy and society, including increasing development limitations for rural enterprises and consequently, for the community. Its main element is to drain and reduce local financial resources through the heavy performance and income dependence of rural businesses on the demand and acquiring ability of local people and subsequently, flow of local capital outside, towards external markets. Consequently, as they, according to the economic base theory, perform mainly basic activities which are to supply the home market, the surveyed enterprises reduce considerably development opportunities for themselves as well as for location area/community. However, it should be remembered that, at the same time, rural enterprises fulfil meaningful social task satisfying various (mostly basic) needs of rural people. Thus, especially in case of more remotely located areas, they constitute extremely important direct link of some supply chains (of goods, services, ideas and knowledge), or, in a wider perspective, act as a critical transmitter in diffusing innovations from central nodes/growth poles to rural peripheries.

The cooperation, mentioned hardly ever by rural business owners, may be considered as a distinct type of economic relationships. This may prove rather simple manufacturing processes in some of the surveyed enterprises, including technologically simple product or the possibility that all the processes were performed within the company, which, at the same time, did not require to establish cooperation links. It also seems that, at least to some extent, the business/industry sector might be decisive, since the cooperation is usually perceived as a typical, or even “natural”, for the manufacturing and processing activities, and less common for services. At the same time, in the retail trade industry such kind of relationships happens very rarely, while the wholesale and retail trade companies constituted the majority of the surveyed business owners.

However, apart from considerations above, networking capabilities as well as cooperation opportunities were significantly more advanced or even “natural” in the case of companies located in the major cities, than those from other urban centres. Hence the higher was the percentage of business owners who declared existing cooperation links with companies from cities highly ranked in the settlement hierarchy (11.3%) than from medium-sized (7.7%) or small towns (2.1%). This is due to the higher technological content and more advanced level of organization of such enterprises and consequently their high receptiveness to the cooperation activities and wider access to the worldwide channels of flows and distribution of goods, services and information. These conditions, however, reflect in their stronger linkages, at the global and regional scales, with companies from other large cities and metropolitan cores, than with rural businesses.

The strongest relationships with small towns were established by rural enterprises located in Warmia & Mazury, which was proved mainly in terms of sales (22.3%) and the sum of three types of surveyed relations (35.5%). This might result indirectly from the relatively large number and dense network of little towns as well as their even spatial distribution, and consequently high spatial and transportation accessibility to them. The scarcity of large towns and cities (considered at least as sub-regional centres) and irregularities in their geographical distribution within the region might be also of a great importance. In addition, the research outcomes might be also, to some extent, influenced by the considerable number of rural-urban communities within the surveyed as it was the case of Warmia & Mazury. The rural enterprises located in communities of a “mixed” administrative status (rural-urban) are usually very strongly linked to the neighbouring urban market as a result of various relations of administrative, functional and economic character.

What seems to be interesting, the slight differences between surveyed enterprises from Podlasie and those from Warmia & Mazury were noticed in terms of goods and services purchased in small towns (respectively 15.8% and 18.2%). It may be greatly explained by revealing the location of their key trade partners which were in both cases individual and commercial customers from me-

dium-sized towns and large cities accounted for 49.1% of enterprises from Podlasie and 46.3% of their counterparts from Warmia & Mazury. In addition, it should be highlighted that for enterprises from Warmia & Mazury medium-sized towns were more significant as a supply markets (24.8%), while for rural firm from Podlasie these were large cities (43.9%), or actually one – Białystok – the capital of the region. The weakest linkages with small towns had rural enterprises from the northern part of Mazowsze (22.5%), especially in terms of purchasing the business inputs (2.4%). Indirectly, it probably resulted from the limited number of such centres located nearby surveyed communities and at the same time, from the little distance to medium and large urban centres. The factor that made rural enterprises from Mazowsze head for Warsaw and its surrounding area was the considerable size of the supply market and its beneficial qualitative characteristics (including convenient prices and great variety of products, services and business solutions). These preconditions together with the high transportation accessibility and connectivity (international roads and railways as well as national, secondary or other alternative road connections) were crucial to create, maintain or even strengthen the economic linkages with larger urban centres, but at the same time, they weakened significantly relationships with nearby small towns leading to the disintegration of the local systems.

The administrative status of a community was one of the key factors which strongly influenced directions of flows of goods, services and capital resources from/to the surveyed enterprises. The existing economic linkages with a small town (often with the nearest one, located within the community's boundaries) were mentioned by the majority of business owners from rural-urban communities (55.8%), whereas it was highlighted only by every fifth respondent from typically rural communities. The influence of this factor was clearly visible in the case of selling goods and services to small towns (correlation +0.41 (Pearson's correlation coefficient)), which was declared by 44.2% of respondents from urban-rural communities and only by 8.7% from rural ones. However, its influence turned out to be very limited in the case of purchases (14–16% in both types of communities), which might confirm, often mentioned in the literature, an increase in the tendency to by-pass small towns. In fact, for many of rural enterprises little towns do not play the role of important or exclusive processing, production and trade centres any more. Their significance either for rural areas and the entire urban network have gradually declined since they started to lose their traditional functions in favour of some more distant urban centres ranked higher in the hierarchy of settlement system or even highly saturated with various economic activities suburban or periurban zones of large cities/metropolitan zones.

On the other hand, in light of the research outcomes, small towns can be still important for some of rural enterprises. It was proved by over 50% of business owners coming from 7 out of 19 surveyed communities (Czarna Białostocka, Brok, Reszel, Ruciane-Nida, Sępole, Dziadkowie and Kiwity), who pointed

out individual and commercial customers from small towns as the main trade partners. First five had rural-urban (semi-urban) status, which makes us believe that purchases, sales and cooperation were performed as close as possible, that is in the nearest town – the seat of the community government (local councils' office). Moreover, small towns of Reszel, Ruciane-Nida and Sępólno together with other nearby urban centres of a similar size and rank create relatively dense urban network, which facilitates trade flows. On the other hand, it seems to be natural that it may also contribute to the competition between them to gain an advantage, at least, at the local scale. Among mentioned communities the highest percentage of business owners who declared economic linkages with small towns (the sum of relationships) was observed in Dziadkowice (75.0%). It was probably caused mainly by its specific location in the triangle of three small urban centres and little distances to them. And, what is interesting, this relation was to a small extent shaped by the very high transportation accessibility of Dziadkowice from large cities (throughout the international road) and the proximity to one of the medium-sized towns. Similar reasons determined strong linkages of rural firms from Kiwity with small urban centres. Also in this case the structure of economic relationships was only to a small extent influenced by the low distance to the medium-sized town of Bartoszyce.

Small towns were also one of the directions of flows of goods and services among other (eight) surveyed communities, although in none of them did not play a significant role. It reflected in the low percentage of respondents who declared at least one type of all the examined relationships (sales or purchases or cooperation) ranging from 6.7% to 16.7%. The combination of two factors – only a few nearby small towns and the proximity of larger urban centres (usually of a medium size) was decisive for bypassing local centres. Those business owners who did not mention economic linkages with small towns were mostly from the region of Podlasie, i.e. Bakalarzewo, whose neighbouring small town is Olecko, but sub-regional centre and medium-sized town of Suwałki is just slightly farther; Białowieża, close to which there is no small town, and the nearest and the only one is medium-sized town of Hajnowka; Grodek gravitating economically towards very well-connected regional city of Białystok despite a little distance to other three local towns; Plaska, which is located nearby medium-sized town of Augustów.

Seeing that 26.8% owners of small businesses (10–49 employees) and respectively 17.4% of those who owned micro enterprises (1–9 employees) admitted to provide individual and commercial customers from small towns with goods and services, it proved that size and business sector of the surveyed enterprises had significant effect on the degree of economic integration between rural areas and small urban centres. Such linkages did not exist in the case of medium-sized enterprises, since most of them had strong relations with larger urban centres (71.4%), particularly in order to purchase business inputs.

The degree of economic integration between rural firms and small towns was the highest in the case of services such as finance, insurance, education and healthcare (almost 45% of all types of relationships, including sales, supplies and cooperation). These kinds of services are typical of towns, even small ones, which traditionally play important role as local service centres for the surrounding countryside. Relatively strong linkages with small urban centres were established by trade and manufacturing businesses (respectively 33.9% and 30.6% of sum of relationships). In addition, according to respondents' opinions, economic ties with small towns were only of a marginal importance to tourism, hospitality and catering industries (13.3% of sum of relationships). This is not surprising if we assume that such activities are of a supra-local character, thus they mostly satisfy external markets demand i.e. needs of tourists and visitors coming from further areas and large cities, and rather not from nearby small towns.

Among the location factors that were taken into consideration by respondents when choosing the business location, the crucial ones for enterprises that were the most strongly linked to the small towns were: transportation accessibility (45.5%), owner's permanent place of living in the same community or village (30.4%), cheap workforce (42.9%) and "other" factors (28.6%). For the enterprises mostly economically linked with sales and supply markets of larger urban centres (medium-sized towns and large cities), excluding the owner's place of living (68.6%), the main factors were: transportation accessibility (100%), easy access to natural resources (90.9%), proximity to large cities (85.7%), well-developed infrastructure and accessible business facilities (80.0%) and cheap workforce (71.4%). Therefore, it seems that those from the latter population, when choosing the business location, they paid more attention to specific conditions which could facilitate economic activity and be considered as a development opportunity in order to maximize the profit, fully satisfy consumers' needs and successfully operating on the market. Business owners who had stronger contacts with small towns were probably much less likely to carry out such a broad analysis of the location factors, so their scope of activity was more spatially limited.

The strongest linkages between rural areas and local towns were observed in the case of firms owned by people with basic vocational education, who sold (23.9%) as often as supplied themselves with goods and services in small urban centres (20.9%). The enterprises run by well-educated people pursued a different trade pattern since they purchased necessary business inputs mainly on large supply urban markets, bypassing small towns (11.8%) which were important destinations for their outputs (25.5%). In addition, closer relationships with smaller urban centres were declared by respondents of post-working age (41.7%) rather than by those "younger" of mobile working (31.2%) or non-mobile working age (24.5%). Although, representatives of the older generation were more likely to follow the above-described pattern of relationships performed usually by well-educated respondents, while younger (of mobile working age) they slightly more often were

purchasing business inputs in small town than selling outputs there. This may prove not so much a lack of experience in running a business, but more about the difficulties of access to further, external, large supply markets, and limited opportunities to meet the needs of the small town customers in highly competitive conditions on the part of other local companies as well as those operating at regional or global scale.

Furthermore, small towns were probably deliberately by-passed by younger entrepreneurs as sales markets. At the same time, many highly positive effects including higher incomes, lots of potential economic contacts and broader development opportunities encouraged them to establish direct relationships (excluding “transmitters” such as small towns or even some medium-sized urban centres) mainly with large urban/metropolitan markets.

Small towns were more important supply and sales markets of rural businesses whose owners were also farmers (running farm concurrently with the company) (40.8%) than of those who focused only on non-agricultural activity (24.5%), which has been proven by scientific evidence (Heffner 2005). Although, when formulating their opinions about economic linkages, it was probably quite difficult for respondents to separate both functions, thus, small towns might be regarded mainly as the nearest and the most accessible sales market for farming. In Poland, small urban centres are commonly perceived as a “natural” place to locate food processing plants or supply markets offering inputs not for enterprises, but rather for farms.

Based on the research outcomes we may also observe how economic relationships with a small town influenced (current) financial situation of an enterprise as well as its development perspectives. Small towns were considered as important supply and sales markets by respondents claiming that the financial health of an enterprise was more beneficial than some years ago (31.5%) or stable (33.9%). It is interesting that, at the same time, for businesses whose the situation has deteriorated recently, individual and commercial customers from small urban centres were significantly less attractive trade partners (21.4%). Given that enterprises located in large cities and metropolitan areas are usually strongly linked to the international markets, they have experienced the global financial crisis very profoundly. It resulted, among other things, in the weakening of their economic contacts with rural business partners. Hence, a distinctive distribution of responses were observed among the owners for which economic ties with suppliers/purchasers from large urban centers represented a significant part of business transactions.

It seems, therefore, that the economic potential of small towns regarded as both supply and sales markets is not fully recognized and used by rural enterprises. Due to the proximity, easy access, historically formed relationships, high degree of the local economic integration and often less sophisticated needs of their population, small urban centres can be still considered as a one of “natural” ways to diversify sales and supply markets for rural firms (without significant organizational effort and financial support). Additionally, as it is in a more indirect

way proved by research results, the strong and stable trade relationships with local towns can be considered as a one of the basic ways to mitigate or even avoid the negative effects of economic downturn. In other words, rural enterprises can be more resilient to market volatility, financial turmoil, economic change or other external key-factors if they maintain strong and steady relationships at the local scale. On the other hand, the regional and global linkages undoubtedly bring about potentially considerable economic benefits, but of the higher risk.

Conclusions

One of the effects of globalisation has been to shorten the supply chain by reducing the distance and time between its successive links: rural producer – processor – distributor – final consumer. At present, the last three elements are more often at the regional, national or even global levels, thus they provide the rural business owners with potentially higher income and wider development opportunities, not limited by poor absorption capacity and needs of the local market. On the other hand, along with the noticeable improvement of transportation and communication systems, this process has facilitated rural individual and commercial consumers' immediate access to "global" products. The direct effect of these changes has been the loss of small towns' traditional basic functions in servicing the surrounding countryside, and consequently, a decline in the significance of small (local) urban centres as supply, sales and cooperation markets for rural farms and enterprises.

The role of a small town as a "transmitter" between main urban nodes and (more peripheral) rural areas has been reduced in terms of social functions, given that globalisation and technological progress (IT, mass media) have facilitated flows of information, ideas, innovations, behaviour and consumption patterns, and opened new job opportunities (distance working), or, more generally, influenced people's lifestyles. In this way, the significance of small urban centres has been increasingly marginalised and they are no longer "meeting places" of the rural and urban society/economy. In effect, this "shrinking space" has to a large extent proved the competitive advantage of highly ranked urban nodes (in urban hierarchy) with regard to satisfying needs not only of rural, but also other urban people and businesses. Much more often and in a variety of aspects small towns play an important role e.g. stimulating and employing the rural workforce, and thus still remain professionally and spatially easy accessible (local) labour markets for people from the surrounding areas.

According to the study's findings, the relatively weak economic linkages between small towns and rural areas, seem to prove the popular thesis among scientific researchers that the position of small towns in the urban hierarchy has changed

considerably, since the linkages between small urban centres and their rural surroundings have been “substantially eroded through the process of socio-economic restructuring, including the transformation of agriculture and a decline in other primary industries” (Courtney et al. 2008: 356), and that they are mainly characterised by a low degree of local economic integration (Heffner 2005). Nowadays, small towns are becoming less important as sales, supply and cooperation markets for rural businesses, and hence their position in the structure of trade relations has been significantly weakened in favour of medium-sized towns, large cities and their highly urbanised neighbourhoods. In this context, it is necessary to look for new economic functions that could be successfully performed by small towns.

One way to improve the attractiveness of a small town, either for its residents or for external individual and commercial customers, may be the further diversification of the structure of its economic functions/activities, especially highly advanced/specialised services (once accessible only in larger cities), along with upgrading their quality and offering competitive prices, which is particularly important for (rural) elderly people usually with limited funds (Hoang et al. 2008; Czarnecki 2011; Kubejko-Polańska 2013). Shorter distances and travelling times and lower costs for a similar quality of goods and services (compared to those in large cities), may provide sufficient impetus for rural people and businesses to return to supplying themselves from the nearby town.

The rural businesses may somewhat reduce the risk of crisis by diversifying the structure of their economic linkages, especially if their major trading partners operate at a national or global level. This may be possible by establishing new relationships with individual and commercial customers from a small town, and making them important trading partners. On the other hand, rural firms can increase their development opportunities by opening up to other nearby but external markets. In particular, this can be critical if they have previously focused only or mainly on satisfying local demand, often characterised by limited needs and low consumer earning power. Building a dense network of economic relationships reinforces and sustains the cohesion of local systems in various aspects, while a higher degree of local integration favours socio-economic growth (Heffner & Solga 2006).

There is a vital need to foster positive relationships between small towns and their rural surroundings in order to improve the socio-economic integration of the spatial (local) systems. At the same time it is also crucial to develop and support the bottom-up activities of various groups of community stakeholders tending to improve the attractiveness of a small town for external investors (entrepreneurs and new or potential residents). According to P. Derriman (1999) success will depend on “passion and creativity” and the ability to create business development (Sørensen et al. 2010) in other words, on local resources (see Collits 2000). In this context, some important tasks should be undertaken by local authorities, assuming that they are able to appropriately identify needs and priorities of local residents and economic groups, and are willing to meet their preferences as broadly as possible. Local

decision-makers can help to avoid a weakening or even disintegration of the relationships between farming, food-processing industries and related services. One method is to reduce the distance between the successive links of the supply chain, e.g. by providing favourable conditions to locate the food-processing company in the nearest small town, thus reducing transport costs and eliminating intermediaries.

Local authorities have various instruments that can be used to attract external investors and potential/future residents, including spatial development plans, local development strategies, community master-plans, marketing and promotional activities, improving the area's infrastructure, applying for funding from external sources, reducing and postponing payments of the local tax or other local charges etc. The authorities may also negotiate and regulate the use of natural resources by local people, external investors, as well as temporary/seasonal users (tourists and second-home owners). However, while decentralisation has great potential, reflected in efficiency and delegation of tasks and responsibilities, it is often accompanied by considerable transaction costs and obstacles of a financial, environmental, social and infrastructural character. And although, with suitable resources, the municipal and town authorities can gain the opportunity to reinforce economic relationships between towns and their rural hinterland, the more general issues such as land ownership or the necessity to be consistent with the goals of regional or national development strategies, or conflicts of interest among stakeholders, seem to be curbing local initiatives to a large extent.

Transforming the research outcomes into recommendations for policies or practical solutions seem to be issues of a key importance in empowering local people and supporting rural businesses in order to drive the functional diversification of a small town mainly in the more advanced/specialised services sector. As a result, small urban centres could continue to play an important role for surrounding countryside, and at the same time prevent the brain drain of the most valuable human resources (young, well-educated and highly qualified people), who contribute considerably to the human and intellectual capital of rural communities. On one hand, they can be considered as a required "resource" to implement widespread innovations coming from the growth poles, while on the other hand, creation of new ideas and practical solutions to current problems of the local systems also largely depends on them and their particular qualities.

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Jakub Hadyński, PhD

Department of Economics and Social Sciences
Poznan University of Life Sciences

THE REGIONAL ASPECTS OF RURAL AREAS COMPETITIVENESS IN THE EU

Introduction

This article deals with the issue of regional competitiveness of rural areas. The competitiveness of rural areas constitutes the growing area of science interest. It also gathers the growing attention of the development policy, which relates to the effects of socio-economic and political changes. These observations were used to set research objectives.

The main aim of this study was to identify the competitive rural areas at the Nomenclature of Territorial Units for Statistics (NUTS) level 2 of European Union (EU) regions based on rural characteristics as well as on the Regional Index of Competitiveness (RCI), which was designated by Directorate-General Joint Research Center together with Directorate-General Regional and Urban Policy. Moreover, some other development indexes were used to indicate the level of regional competitiveness. EUROSTAT statistical data, covering 2007–2013 period, along with the American Harvard Business School (Porter 2003, Porter, Ketels, Miller, Bryden 2004) studies of rural areas competitiveness were used.

The scope of research included the classification of European Union regions at NUTS level 2 to enable statistical comparisons, the determination of characteristics of rural regions and the use of Regional Index of Competitiveness (RCI) to measure the competitiveness of designated regions.

The rural areas in the economic development

Until recently, rural development was closely related to agriculture and constituted traditional economic activities. Historically, agricultural policy was seen as synonymous with rural development policy. Although developed countries still

perceive agriculture as important factor in shaping land-use, its economic importance is declining (OECD 2003). The role of rural areas of the national economy varies and is determined by the level of a country's economic development. Rural areas on the lower level of economic development are directly related to farming and are subordinated to a primary goal of ensuring food security in the country. Having reached the stage of food security, a further increase in productivity can be noticed. It depends on the level of internal competitiveness and on the ability to sell surpluses in foreign markets. The next step of development is linked with the boost of economic growth and the prosperity of society which direct the attention to the non-productive functions of agriculture. Thus, rural development is gaining importance and further economic development is related with the separation of agricultural and non-agricultural objectives of rural development.

Rural development constitutes a very important policy area of the European Union (EU). This is due to the fact that in the 28 EU member states more than 56% of the population is living in rural areas, which occupy 91% of the territory. Meanwhile, in rural areas, the average level of income per capita is lower than in cities. People are less qualified, businesses are less competitive and service sector is less developed. On the other hand, rural areas have a lot to offer, they are used as a commodity supplier, a place for rest and recreation as well as they allow to meet aesthetic and climate needs. The enhancement of rural development policy has therefore become an overall EU priority.

The European Union has an active rural development policy in order to enable these territories to overcome their structural handicaps as well as to unlock their potential. In this regard, individual EU Member States could implement and operate completely independent rural development policies. However, this approach works poorly in practice. Not all EU countries would be able to afford the policy they need. Moreover, many of the issues raised in the context of rural development policy require cross-border solutions e.g. pollution as the preservation of the environment has become both European and international objective. In addition, rural development policy has links to a number of other policies set at EU level. The Common Agricultural Policy Reform Agenda 2000 increased the importance of rural development, including sectoral policy. Rural development, in accordance with the Lisbon / Gothenburg strategy, is designated to promote the creation of new jobs and economic growth in rural areas in a sustainable way.

Therefore, the EU has a common rural development policy, which however gives individual Member States and regions a significant control. This policy is partially funded from the EU budget, and partially from national or regional budgets of individual Member States. The basic rules for the rural development policy for the period 2007–2020, as well as the policy measures available to Member States and regions, are set in the Council Regulation (EC) No 1698/2005.

According to the assumptions set in Art. 4 of Regulation 1698/2005 (DU (EC) 2005 L 277) the activities offered under the Rural Development Programme

2007–2013 were related to three areas, namely economic, environmental and territorial as well as grouped under 4 axes to point out the priority directions of EU rural support:

- Axis 1. (economic): The improvement of agricultural and forestry sector competitiveness.
- Axis 2. (environmental): The improvement of the environment of rural areas.
- Axis 3. (social): The Quality of life in rural areas and the diversification of the rural economy.
- Axis 4. LEADER.

In order to ensure a balanced approach, Member States and regions were obliged to distribute their rural development funding between all three thematic axes. Furthermore, one of the requirements stated that a part of the funding must support projects based on experiences gained from the implementation of the Community Initiative LEADER. The LEADER approach to rural development involves highly individual projects designed and executed by local partnerships to address specific local needs. In the period 2007–2013, a great emphasis on the implementation of a coherent strategy for rural development in the EU was put. In this context, the national strategic plans, which were based on the strategic guidelines of the EU were implemented. It was assumed that this approach should help (EC 2015):

- to identify the areas where the use of EU support for rural development adds the most value at EU level;
- to make the link with the main EU priorities (for example, those set out under the Lisbon and Gothenburg Agendas);
- to ensure consistency with other EU policies, in particular those for economic cohesion and the environment;
- to assist the implementation of the new market-oriented CAP and the necessary restructuring it will entail in the old and new Member States.

The competitiveness of rural areas

The increase of the competitiveness is the development success indicator of rural development. The issue of competitiveness is understood as an attempt to gain an advantage with respect to other participants in the market and is driven by both supply and demand. Nowadays, rural development has become more closely associated with the competitiveness. The process of rural areas competitiveness increase is very complex and multi-layered. This issue rises some questions, what determines the competitiveness of rural areas and what factors influence it?

Rural competitiveness depends on the specific characteristics of the region, which is affected by natural conditions, historical context and socio-economic

phenomena. The competitiveness of the area, including its nature, dynamics and forms are determined by many factors. These factors can be classified in different ways. The basic division is related to their origin and relate to exogenous and endogenous factors consisting of issues such as: economic growth (including the creation of new jobs and the real income increase), the preservation of the environment, the improvement of living conditions in rural areas, the protection and enhancement of cultural heritage (Wilkin 2000). Endogenous factors are all own resources of the area. These are internal factors that can be affected to some extent by the area (their number, potential). Their origins can be found in the economic and social potential, they also relate to the spatial qualities, the availability of resources and the activity of the administrative authorities, organizations and local institutions. They often have a specific character corresponding to a region and produced by him. Exogenous factors are associated with the development of the national economy and have macroeconomic character. This means that they are external to the area, and that in spite of their impact on the economic situation and the choice of endogenous factors, the region has no ability to influence the direction and strength of their interactions (Korenik 2003). The examples of such factors are the phenomenon of globalization, the EU integration process, macroeconomic fluctuations, political changes (e.g. the decentralization of the state), the changes of economic situation, the objectives and scope of intraregional policy applied by the State, the competitiveness of the surrounding regions etc. Furthermore, another factor affecting the development of rural areas is a mechanism that determines the endogenous response, the ability to respond to macro-environment changes, as the effect of an exogenous factor, or adaptability abilities, adapting socio-economic structure to the changing conditions.

While developing the competitiveness of rural areas a multi-sectoral approach is being used, which involves a number of issues of demographic, economic, social and environmental impacts. At the same time, this process is changing rapidly, as it also includes new phenomena associated with change and adaptation, e.g. the issues of technology and ecology, economy and society (UNECE 2007).

The increase of the competitiveness of rural areas is related to the demographic and employment policies, job creation and prosperity. The competitiveness of rural areas also includes a sphere beyond economic issues, which are related to public goods such as clean environment, attractive landscapes and cultural heritage (OECD 2001). There are several factors that contribute to the competitiveness in relation to private enterprises in rural areas. They include: the ethos of the economy, a low crime rate, a high ecological quality, the low price of land, low and stable wages and the weak role of trade unions (Stawasz, Stawasz, 1995). The important issues of the competitiveness of rural areas are related to the processes of migration and mobility of people. These are the factors determining the inflow or outflow of people (also in terms of migration timescales), as the main factor for which and through which the development occurs.

Nowadays, another important group of development factors are modern technical and technological solutions, including communication. They address differences and eliminate a distinct boundary linking the residence with the workplace and occurring relationships, they also result in a high growth and the high quality of life. Rapidly changing technologies and the increasing importance and the effects of globalization make the education and skills necessary actions to ensure their livelihoods and the competitiveness of the economy, including the rural economy.

In spite of the factors of rural areas development the attention should also be drawn to other factors characterizing areas with the high rate of economic growth. Their observation leads to the conclusion that these areas are usually characterized by one of the three features:

- specific natural resources, including an attractive landscape, a clean natural environment,
- urban neighborhood,
- the network of retail and financial services/nodes (individual growth centers scattered throughout the country),
- the functioning of the economic centers, e.g. in the form of a large company,
- a well-functioning of local authorities.

Noteworthy is also the important role of public authorities in creating development and the emergence of new opportunities for stimulating rural areas development. One such factor is the creation and development of endogenous resources based on public funds. This argument is undoubtedly important for the consideration of external factors. The initialization of development based on external funds is encouraging development of rural areas, while more advanced projects (e.g. relating to the implementation of the LEADER) need to have adequate resources factors, such as properly educated staff and technological resources.

It can be assumed that the competitiveness of rural areas depends on taking into account at least four basic assumptions (Giessen, Böcher 2008):

- rural areas are diversified in terms of regional characteristics and existing problems,
- the use of the strengths and the ability to overcome the weaknesses of the region determines its development potential,
- each region has its own individual strengths that can serve as the basis for the future development,
- based on the analysis of human resources in the region one can recognize the strengths of the region and the possibilities for the future development.

The competitiveness factors of rural areas are in line with the factors of regional competitiveness, while the problems of rural areas of highly developed countries differ, but they still reveal some common features. The factors mentioned derive from the significant features of rural areas, which can be used to identify common characteristics and should guide the rural development policy (OECD 2001). This applies to areas related to the land factor, but also partly to the

work factor. This points at the fact that rural areas are experiencing problems with different socio-economic and environmental terms. The activities of overcoming rural problems are mainly related to the search for sources of income and job creation. An important issue to be solved is the question of how to transform natural resources, social capital, human and material, and financial resources into the desired development effects, as well as how to transform threats into opportunities and strengths into the forces driving growth. Moreover, possibilities in this area tend to be bottom-up initiatives, which is an innovative approach to the development of the territory. They prefer the new solutions and ideas and innovative approaches, including creative adaptation solutions that have worked in other areas, directly supporting the development and contributing to positive change in rural areas. The intervention of public authorities plays important role in this process as it allows for the activation of local resources, the socio-economic development, including local governments, businesses, community organizations and residents, which is done through the financial support of joint operations. These initiatives are mainly innovation, which includes different directions related to, inter alia, the diversification of the local economy, multifunctional rural development, stimulating learning processes, including self-study, the development of the interaction between the local and global levels. These activities may also include the process of change of mentality, the promotion of technology transfer, the adaptation of the administrative and financial framework, to strengthen networking, research and experiences, to explore the ways of closer integration and internal cohesion.

Results

In view of the considerations set out above, the competitiveness of rural areas is becoming an increasingly important socio-economic and political issue. There is still a question to be raised, how to shape the competitiveness of rural areas in the EU? This issue can be perceived from different perspectives, taking into account different indicators, data or various territorial units. Thus, spatial analyzes consider different levels of administrative division existing in the Member States. These analyzes may apply to the local level (LAU 1) in accordance with the system of rural areas designation determined by the United Nations (UN 2010). The competitiveness of the higher levels of territorial division is less frequently considered. Therefore, the competitiveness of rural areas of EU regions at NUTS level 2¹ was analyzed in this study. The overview of the characteristics of the NUTS

¹ Designation of research subject i.e. EU regions at NUTS level 2. For this purpose, 273 territorial units, based on statistical data, were identified. The errors associated with agglomeration effects were eliminated and metaregions were identified, including Inner London (UK11) of Outer

2 regions was undertaken in order to distinguish specific features that point to their rural character. The following features have been taken into account:

- predominantly rural area, which is important in terms of area coverage (group I),
- the above average (over 50%) share of the population living in predominantly rural areas and the number of people working in predominantly rural areas to the total number of employment exceeds 30% (group II).

The next step included the identification of regions that had an identified set of features. For further analysis, the following regions were taken into consideration (Table 1).

Table 1. The type of rural region

I type of regions (group I)
<p>EU regions at NUTS 2 level (2010) Regions 100% predominantly rural areas: Burgenland (A), Prov.Luxembourg (B), Severozapaden, Jihozapad, Stredni Morava, Niederbayern, Nordjylland, Castilla-La Mancha, Extremadura, Itä-Suomi, Pohjois-Suomi, Åland, Poitou-Charentes, Limousin, Corse, Guyane, Anatoliki Makedonia, Thraki, Dytiki Makedonia, Ionia Nisia, Sterea Ellada, Peloponnisos, Voreio Aigaiο, Notio Aigaiο, Nyugat-Dunantul, Border, Midland and Western, Provincia Autonoma Bolzano/Bozen, Molise, Basilicata, Opolskie, Algarve, Alentejo, Norra Mellansverige, Mellersta Norrland,</p> <p>Regions 75–100% predominantly rural areas: Trier, Salzburg, Wielkopolskie, Del-Alfold, Länsi-Suomi, Kärnten, Calabria, Kozep-Dunantul, Podkarpackie, Highlands and Islands, Sardegna, Thessalia, Kentriki Makedonia, Eesti, Vzhodna Slovenija, Kassel, Lubelskie, Tirol, Kujawsko-Pomorskie, Midi-Pyrénées, Lodzkie, Sjælland, Abruzzo, Centro (P), Southern and Eastern,</p> <p>Regions 50–75% predominantly rural areas: Prov.Liège, Bretagne, Toscana, Sud-Est, Vest, Nord-Est, Lorraine, Malopolskie, Mecklenburg-Vorpommern, Midtjylland, Lazio, Piemonte, Schwaben, Mazowieckie, Pays deLaLoire, Leipzig, Vychodne Slovensko, Swietokrzyskie, Aquitaine, Warminsko-Mazurskie, Galicia, Stredne Slovensko, Nord-Vest, Marche, Thüringen, Unterfranken, Niederösterreich, Friuli-Venezia Giulia, Languedoc-Roussillon, Latvija, Aragón, Franche-Comté, Oberösterreich, Eszak-Alfold, Lietuva, Sud - Muntenia, Yugoapaden, Centre, Severen tsentralen, East Wales, Norte, Prov. Namur, Centru, Basse-Normandie, Småland med öarna, Del-Dunantul, West Wales and The Valleys, Auvergne, Picardie, Zapadne Slovensko, Dytiki Ellada, Oberpfalz, Syddanmark, Mittelfranken, Bourgogne, Steiermark, Vorarlberg, Podlaskie, Sud-Vest Oltenia,</p>

London (UKI2) (East and North East, South, West and North West) and the Brussels Capital (BE10) of Vlaams Brabant (BE24) and Brabant Wallon (BE31). This was associated with a high employment rate in Inner London (UKI1), the residents of Outer London (UKI2); similar to Brussels' occupancy, the residents of neighbouring provinces (Halle-Vilvoorde, Leuven, Nivelles). Due to the procedure 268 units were identified for further analysis.

Table 1 (cont.)

II type of regions (group II)
<p>Regions where over 30% population is working in predominantly rural areas: Severoiztochen, Lüneburg, Koblenz, Champagne-Ardenne, Jihovýchod,</p> <p>Regions, where over 50% population is living in predominantly rural areas: Övre Norrland</p>

Source: own calculations based on Eurostat 2006, 2007, 2008, 2009, 2010, <http://epp.eurostat.ec.europa.eu/portal/page/portal/eurostat/home/>

The research procedure allowed for the distribution of rural regions at NUTS level 2 in the EU. On this basis, it can also be indicated where rural regions of high and low competitiveness are located in the EU (measured with the use of RCI, designated by DG Joint Research Center together with DG Regional and Urban Policy). The method of determining the indicator is based on the identification of the key factors to be able to provide a general, but also synthetic picture of regional competitiveness. The values obtained for each unit were grouped, including assigning them numbers corresponding to the values of the partial characteristics of individual indicators. Therefore, this process allowed for the identification of two basic types of regions. Therefore, given mentioned parameters 123 units were qualified as rural regions NUTS level 2 (Figure 1) and divided into 2 groups. Rural regions in terms of area coverage occupied by predominantly rural areas take up 33 regions of which 100% are predominantly rural areas, 25 regions with areas (predominantly rural) up to 75–99% of the surface. 59 regions, where the predominantly rural areas occupy up to 50–74% of the area (in total 117 regions).

With reference to the above average (50% or more) share of the population living in predominantly rural areas 1 region was identified SE33 Övre Norrland. As the final criterion of the number of people working in predominantly rural areas to the total number of employment exceeds 30% was considered, 5 regions were qualified.

Figure 1 shows the distribution of rural NUTS level 2 regions in the EU according to the adopted criteria. Rural regions are located peripherally and mainly in the Nordic countries and in the south of the Balkan Peninsula (regions in Greece), the Iberian Peninsula (regions in Portugal and Spain) and the Italian peninsula (regions in Italy), as well as in Ireland and Scotland. Regions where 50–75% take up rural areas exist mainly in the eastern part of the EU and in the south-west of France. They are characterized by diversified level of development, in comparison with both other rural regions as well as across all regions of the European Union.

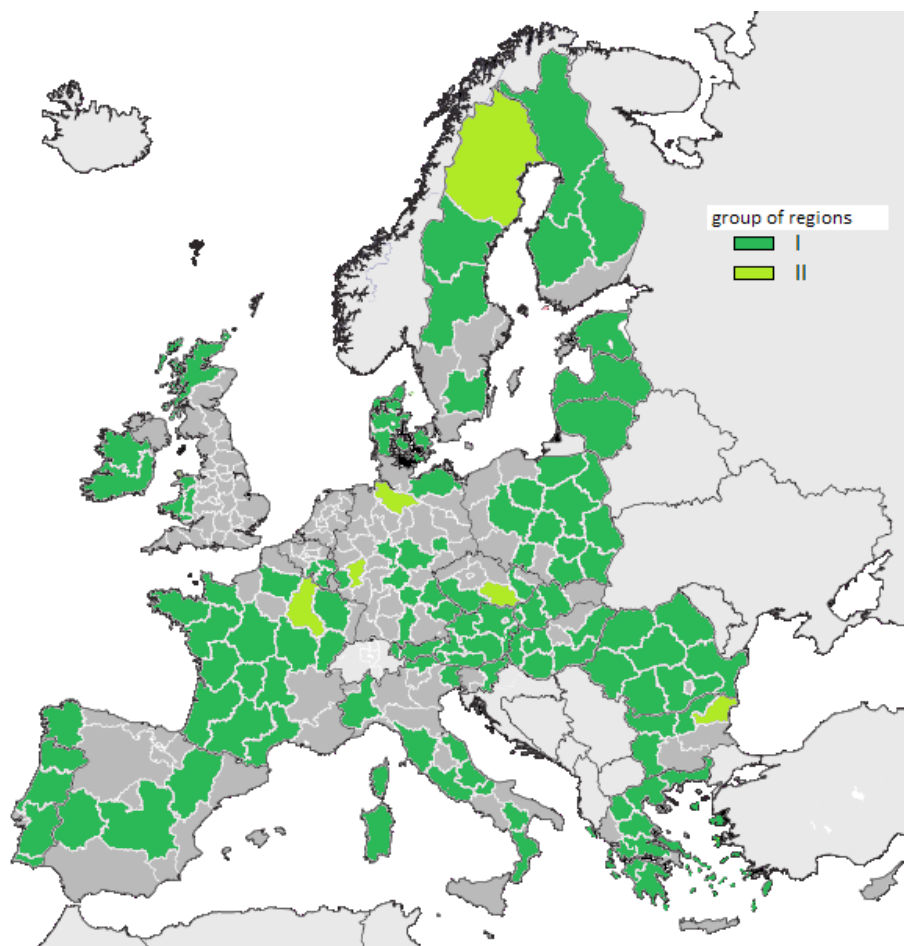


Figure. 1. Rural areas identified on the basis of the adopted criteria include 123 regions

Source: own calculations based on Eurostat 2006, 2007, 2008, 2009, 2010, <http://epp.eurostat.ec.europa.eu/portal/page/portal/eurostat/home/>

GDP (gross domestic product) is the output indicator of a country or a region. It reflects the total value of all goods and services produced in a given area without intermediate consumption. By expressing GDP in PPS (purchasing power parity) the differences in price levels between countries are eliminated. Calculations per capita allow for the comparison of GDP per capita in PPS which is the key variable for determining the eligibility of NUTS level 2 regions, within the framework of the EU cohesion policy.

In this context, the majority of regions (45) are rural, those where GDP is between 75,00–99,99% of the average GDP in the EU countries (including 16 with

100% of the predominantly rural areas). In general, the most of the rural regions belong to the areas in which GDP is lower than the EU average (23 regions produce from 50.00% to 74.99% of GDP and below 49.99% there are 22). In 33 analyzed regions, the GDP was higher than or equal to the average GDP level across the EU (in 26 regions, the GDP was in the range from 100.00% to 124.99%, 6 was in the range from 125.00% to 149.99%, and 1 region above 150.00% of the average of the EU GDP). Table 2 shows the main characteristics of the analyzed rural regions in the EU, depending on the level of GDP.

Table 2. The characteristics of rural regions and the GDP

Rural regions NUTS level 2	150,00<	125,00–149,99	100,00–124,99	75,00–99,99	50,00–74,99	<49,99
100% predominantly rural area		2	6	16	7	2
75–99,99% predominantly rural area	1	2	3	8	7	4
50–74,99% predominantly rural area		2	16	18	8	15
Over 30% population is working in predominantly rural areas				3	1	1
Over 50% population is living in predominantly rural areas			1			
Total	1	6	25	45	23	22

Source: own calculations based on Eurostat 2006, 2007, 2008, 2009, 2010, <http://epp.eurostat.ec.europa.eu/portal/page/portal/eurostat/home/>

The regions with the lowest values of competitiveness index are peripheral in the Central and Eastern Europe. The regions characterized by the lowest competitiveness level are located in Romania and the northern Bulgaria. The relatively low competitiveness level was also recorded in the eastern part of the EU (Hungary, Slovakia), as well as in the south of Portugal, and in the eastern part of the Community, mainly in the Czech Republic and Poland.

Conclusions

The issue of competitiveness represents an important area for modern economics and becomes the meaningful priority of the EU policy. The imperative/necessity of increasing competitiveness applies to both the economic and the pub-

lic spheres. The activities of public authority shape the competitiveness process in all spheres of development, including social, economic and environmental one. Since the end of the twentieth century the EU attention has been drawn to the issue of competitiveness of rural areas. Currently, this theme becomes increasingly important, as further proposals of policy reforms in Member States prove it. The review of documents concerning development plans of the Community after 2013 indicate that the importance of this policy direction continues to increase. Both the Europe 2020 strategy and the overall objectives of the CAP shall support the long-term strategic objectives of EU policies on competitiveness of rural areas in the period 2014–2020. The main objectives of support in this area include: the increase of the competitiveness of agriculture, the assurance of the sustainable management of natural resources, and climate action; and the achievement of a balanced territorial development of rural economies and communities including the creation and maintenance of employment.

Furthermore, the policy will be implemented through national and/or regional rural development programmes (RDP) in the future. The 2013 reform leaves in place many of the key features of rural development policy from 2007–2013.

The attention has been drawn to the need for change in the future policies that apply to strategic approach to constructing RDPs, strengthening the content of rural development measures (KE 2015). This also relates to simplifying rules and/or reducing the related administrative burden where possible; and linking rural development policy more closely to the other European Structural and Investment funds.

Member States will have to build their RDPs based upon at least four of the **six common EU priorities (KE 2015)**:

1. Fostering knowledge transfer and innovation in agriculture, forestry and rural areas;
2. Enhancing the viability/competitiveness of all types of agriculture, and promoting innovative farm technologies and sustainable forest management;
3. Promoting food chain organization, animal welfare and risk management in agriculture;
4. Restoring, preserving and enhancing ecosystems related to agriculture and forestry;
5. Promoting resource efficiency and supporting the shift toward a low-carbon and climate-resilient economy in the agriculture, food and forestry sectors;
6. Promoting social inclusion, poverty reduction and economic development in rural areas.

Moreover, each rural development priority identifies more detailed areas of intervention (“focus areas”). Within their RDPs, Member States/regions set quantified targets against these focus areas, on the basis of an analysis of the needs of the territory covered by the RDP. They then set out which measures they will use to achieve these targets and how much funding they will allocate to each meas-

ure. Funding is drawn partly from the **European Agricultural Fund for Rural Development (EAFRD)** and partly from national/regional and sometimes private sources. The implementation and impact of the policy is monitored and evaluated in detail (KE 2015).

Summing up, one can draw conclusions on the situation in rural areas:

- they are considerably diversified in terms of competitiveness and development,
- they are located peripherally with respect to the center of the European Union, but they predominate in the eastern and northern parts,
- the highest quality of life and the best life conditions exist in the regions of the Nordic countries,
- moving from north to south of the EU, in geographical terms, the quality of life decreases and living conditions deteriorate in rural areas,
- the least competitive regions are the ones in which a low level of GDP was reported. This results in a significant polarization of the EU in terms of the territorial dimension.

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AUTHORS' BIOS



Katarzyna Zajda is a rural sociologist. She works as an assistant professor at the Department of Rural and Urban Sociology, University of Lodz. She completed her master's studies in 2006. Her master's dissertation titled *Implementation of the Pilot Programme LEADER+ in Rural Areas in Poland* was awarded 3rd place in the 15th edition of Prof. Witold Kula competition organized by the University of Warsaw and Bank DnBNORD. She obtained the doctoral degree at the University of Lodz in 2010. In 2013, she completed a post-graduate course in *Business Statistical Data Analysis* at Poznan University of Economics.

She is a holder of Heinrich Böll Foundation scholarship (2005–2006). She completed the School for NGO Leaders (2006) and School for Local Partnerships Facilitators (2007); she is also the winner of the “Knowledge with Passion” contest promoting innovative young scholars (2011). In 2011, she was rewarded by the Rector of University of Lodz for the monograph *New Forms of Social Capital of Rural Areas. The Case Study of Local Action Groups from Lodzkie Voivodeship*, and in 2014, for the monograph *The Structure and Determinants of Local Action Groups' Social Capital*. Her academic output is over 40 publications focused on the issue of rural development, including two books and co-authorship of two others. Her latest book titled *New Forms of Social Capital of Rural Areas* was published in 2014 in Germany by Lambert Academic Publishing.

She participated in several national and international research projects, e.g. ALDETEC (“Action locale et développement territorial en Europe central” – implementation of programme LEADER in old and new UE members), financed by The French National Research Agency; “Structure and determinants of the social capital of local action groups”, financed from the resources of the National Science Centre and „Sustainable rural development through youth participation innovation and entrepreneurship” financed by Swedish Institute.

e-mail address: katarzyna.zajda@uni.lodz.pl; k.zajda@wp.pl



Sylwia Michalska is a sociologist, she received a PhD degree at the Institute of Sociology, The Nicolaus Copernicus University in Toruń. Currently, she works as an assistant professor in the Institute of Rural and Agriculture Development Polish Academy of Sciences and Faculty of Administration and Social Sciences of Warsaw University of Technology. Her major fields of research are changes in lifestyles after socio-economical transformation in 1989, aspirations and life goals of rural areas inhabitants (especially – rural women), gender, social roles, marginalization, social capital and ecological farming. She has taken part in the EU project (MARKETTOWNS, FP5), in the international project

ALDETEC (“Action locale et développement territorial en Europe central” – implementation of programme LEADER in old and new UE members), and in other national projects, i.e. “Process of de-marginalization in polish countryside”, “The farmers’ Pension System and Care and Therapeutic Services in Rural Areas in the Opinions of Two Generations”, “Psychological, social and educational potential of polish countryside”, “Ecological farming as a factor of local development. Analyse of selected cases”.

e-mail address: sibia@wp.pl



Ruta Śpiewak is a graduate of the Institute of Applied Science at the Warsaw University. She holds PhD in Sociology. Her work was about the attitude of rural inhabitants toward the new model of rural development. Since 2008 she is an employee of the Institute of Rural and Agricultural Development at the Polish Academy of Sciences.

She also cooperates with various non-governmental organizations dealing with rural development. Since the last two years she actively cooperates with the Grochowska Consumers Co-op. Recently her research is dedicated to the issue of the power of the farmers organizations in Poland. Her second field of interest is the alternative food networks and their role in the local development.

She has worked in few international projects such as: Local action and territorial development in Central Europe. She has published around 20 articles.

e-mail address: rutaspiewak@gmail.com



Pamela Jeziorska-Biel, a PhD in sociology at the University of Łódź, Poland. PhD thesis (2015): *Implementation of the “Rural Renewal” and the level of sustainability development of municipalities in Lodzkie voivodeship*. Research interests focusing on rural development, activation of the local communities, rural renewal. In 2009–2011 a scholar of the project: “PhD – Regional Investment in Young Scientists, acronym: D – RIM”, co-financed by the European Union under the European Social Fund. In 2014 and 2015 took part in research projects of a team at the Department of Rural and Urban Sociology (University of Łódź): “Sustainable rural development” implemented based on the EU Strategy for the Baltic Sea and “Determinants and mechanisms for sustainable development in rural areas – analysis of attitudes of young people from rural areas in entrepreneurship and innovation, and the possibility of their use for local development” co-financed by the European Union within the framework of the Technical Assistance Rural Development Programme for 2007–2013. A Lead expert in a research project “Creating a network of the most interesting villages”, in collaboration with the Foundation of Assistance Programmes for Agriculture (FAPA).

e-mail address: pamela.jeziorska@gmail.com



Kinga Pawłowska rural anthropologist; she obtained her Master’s Degree in 2008. The Master Thesis entitled ‘Anthropological use of autobiography: countryside woman in the context of blood relationships and family connections based on Peasants’ Diaries (*Pamiętniki chłopów*) of the 30s of the 20th century’ was defended with reward. She obtained her PhD in Ethnology at Lodz University in 2014. Her PhD Dissertation entitled ‘The Dynamism of rural cosmologies: social orders and visions of the world’ is an attempt at reconstructing the ‘cosmologies’ and ‘tactics’ of one of Polish villages. The theoretical frames are set by the three major conceptions – Mary Douglas’ “grid-group”, “New Cultural History”, and Michel de Certeau’s “strategies and tactics”. An important element of the dissertation are the relationships between the Humanities and domination. Since 2008 she has worked an Assistant Lecturer, and as of 2015 as an Associate Professor at the Faculty of Administration and Social Sciences of the Technical University in Warsaw. Her scholarly interest are diverse, yet they concentrate mainly around the issues of rural sociology and anthropology, social economics, social anthropology,

anthropology of culture, sociology of social problems as well as the issues connected with management and the sociology and anthropology of organizations. She is an author of a few articles on rural anthropology, and co-author of monographic works on social participation – 11 articles altogether. She has participated in the project on social economics, and is one of the authors of a manual about these issues.

e-mail address: k_pawlowska@wp.pl



Ilona Matysiak is a sociologist and received a PhD degree at the Institute of Sociology, University of Warsaw. Currently, she works as an assistant professor in the Faculty of Applied Social Sciences, the M. Grzegorzewska Academy of Special Education in Warsaw. Her main academic interests deal with gender, social capital and grassroots activities in rural and urban areas as well as rural-urban migration. Her recent publications include: the book on gender and local power in rural Poland based on her doctoral dissertation (2014, in Polish), “The Feminization of Governance in Rural Communities in Poland: the Case of Village Representatives, in *Gender, Place and Culture: A Journal of Feminist Geography* (2014). Her current research financed by the Polish National Science Centre is focused on the role of highly educated young rural residents in local development. She has taken part in several cross-national studies funded under FP6, FP7 and Polish-Norwegian Research Programme, such as: “WorkCare”, “ENRI-East”, “WORKCARE SYNERGIES”, “WILCO”, “GENDEQU”.

e-mail address: ilona.matysiak@gmail.com



Magdalena Dej Magdalena Dej, PhD – Assistant professor; geography researcher at the Institute of Urban Development in Krakow, Head of the Department of Development Process Research in Central and Eastern Europe. Specializes mostly in local and regional development issues. The development of rural areas is one her fundamental areas of interest. Author and coauthor of several books and dozens of research papers on the impacts of large companies on local communities as well as on rural areas and their relationship with major metropolitan areas and labor markets. Participated in several international research projects financed by the European Union including a project called “Urban-Rural Partnerships in Metropolitan Areas (URMA)” completed within the framework of Interreg IVC.

The URMA project, which was financed by the European Union and Poland's National Science Centre, focused on company relocation and spatial expansion in key metropolitan areas in Poland. Another key project was financed by the International Visegrad Fund and Poland's Ministry of Science and Higher Education. It focused on the *Leader Method* in countries of the Visegrad Group (Poland, Slovakia, Hungary, the Czech Republic) as well as made inroads in the application of this method in the post-Soviet Republic of Georgia. Co-creator and coordinator of the *Geography Breakfast* cycle of seminars that provide an open discussion forum for researchers, political leaders, government officials, experts, and social activists in the area of real solutions to development problems and social problems at the city, township, and regional level in Poland.

e-mail address: magdadej@gmail.com



Adam Czarnecki is a rural geographer and economist. He is a senior researcher at Department of Rural Economics, Institute of Rural and Agricultural Development, Polish Academy of Sciences (IRWiR PAN) in Warsaw. He holds MSc degree in Human Geography (2000, from University of Łódź) and PhD in Economics (2007, from IRWiR PAN). He was successful in achieving a Postdoctoral Fellowship at Karelian Institute, University of Eastern Finland in Joensuu (2012–2014), and currently he is working there as a Visiting Researcher. He is also a member of the Task Force for Development of Rural Areas, Committee for Spatial Economy and Regional Planning, Polish Academy of Sciences as well as a member of the Working Group on Rural Tourism by the Polish Ministry of Sport and Tourism. His research interest include the second-home tourism, rural multifunctionality; rural entrepreneurship; urbanization; and contribution of small urban centres to the rural development. He authored and co-authored three monographs and almost 40 book chapters and papers in scientific peer-reviewed journals.

He has also been involved in a number of projects concerning various aspects and components of rural development, such as international initiatives: “The Role of Small and Medium-sized Towns in Rural Development (‘MARKETOWNS’, FP5, 2001–2004), “Homes Beyond Homes: Multiple Dwelling And Everyday Living In Leisure Spaces (HOBO, Academy of Finland, 2011–2014), as well as national ones: “Significance of Second Homes in Rural Development” (2008–2011), “Socio-Economic Pre-conditions for Sustainable Rural Development with in the Natura 2000” (2008–2011), “Development Models for Rural Areas with Progressive Urbanization in the Lower Silesia Region” (2010), “Urbanization and

Multifunctionality of Rural Areas” (2005–2007) and “Poverty in Rural Areas vs. Spatial Barriers in Local Structures” (2002). Currently he is involved in a research project on Second homes as an opportunity for the local Economic Development (LED) supported by Finnish Foundation for Municipal Development (KAKS). He also carried out an evaluation on “Institutional barriers for rural entrepreneurship in Poland” (2011) and authored a few expertises related to the topics of rural entrepreneurship, urbanization, structural changes in rural space and rural people’s accessibility to public services. He wrote an assessment report of the European Spatial Planning Observation Network (ESPON) 1.4.1 Project entitled “The role of small and medium-sized towns (SMESTO)”.

e-mail address: aczarnecki@irwirpan.waw.pl



Jakub Hadyński holds a post-doc position in the Department of Economics and Economic Policy in Agribusiness, Faculty of Economics and Social Sciences, in Life Science University of Poznan. Doctor Hadyński deals with the issues of local and regional development in terms of rural areas, agriculture and food economy. He carries out research in the areas of competitiveness and regional programming. Furthermore, his interests also include the development issues of bioeconomy, innovation and human activity.

Doctor Hadyński is the author and co-author of numerous scientific publications and conducted a number of national and international research projects, together with the University of Birmingham (UK), Humboldt University in Berlin (Germany), National Institute for Agricultural Research INRA (France). He has also participated in a number of research internships and lectures, including the University of Tel Aviv (Israel), Leibniz Institute of Agricultural Development in Transition Economies (IAMO), and the University of Evora. He is a member of the Polish Association of Agricultural and Agribusiness Economists, the Polish Economic Society, he participates in the National Rural Network.

e-mail address: jahad@up.poznan.pl