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Krystyna Szafraniec, Paweł Szymborski, Krzysztof Wasielewski

Between the School and Labour Market. Rural Areas and Rural Youth in Poland, Romania and Russia¹

Abstract

The article analyses the process of rural youth entering the labour market in selected post-communist countries (Poland, Romania and Russia). Based on different types of local (national) and international source data, similarities and differences are discussed between the analysed countries. The article focuses on transition from education to a satisfactory job, nowadays a very complex process that takes up nearly the entire third decade of young people's life. Although this process is just an external manifestation of general changes occurring in labour markets around the world, the experience of young people from post-communist countries in this area seems to be more traumatic than that of their peers in developed Western countries. Despite significant investments in education, it is difficult to deal with new challenges, particularly for the youth from rural areas. In all the analysed countries, chaotic career paths are typical of this population, and they are often based on temporary jobs, informal forms of employment or self-employment.

Keywords: School and social inequality, rural youth, labour market, post-communist countries

¹ The article was written as part of the following project funded by the National Science Centre (NCN) in Poland *Młodzież w krajach post-komunistycznych. Potencjał innowacyjny, nowe konteksty, nowe problemy i nowe wyzwania* (Youth in post-communist countries. Innovative potential, new contexts, new problems and new challenges), No UMO-2013/08/M/HS6/00430.

Introduction

In today's world, access to work (employment) has become one of the key factors which determine the quality of life, with all its social aspects, such as satisfaction and social tensions. At the same time, due to a variety of circumstances (civilisational changes, economic recession, global trends), work has become a scarce asset. Job deficits primarily affect younger generations, typically raised in the culture of consumerism. Success-oriented and focused on personal well-being, they live a life-style which has significant individual and social implications. According to the ILO reports, the unemployment, economic activity and employment rates for many years have been better for adults than for the youth. In the light of the current legal regulations and employers' preferences, even the young people who have managed to enter the labour market cannot find a stable employment. The job offers addressed to them predominantly include variable, pluralistic forms of part-time and temporary employment. There are several reasons why this happens. First and foremost, it is caused by the volatile nature of postmodern capitalism, as well as by lack of compatibility between the educational offer and labour market requirements, which today are highly variable and amorphous. All these factors, further driven by unstable economic conditions, make satisfactory transition from education to labour market increasingly uncertain and risky. Nowadays this phenomenon is observed in both well-developed and developing countries, whereby the latter find it much more difficult to deal with it effectively.

The article focuses on post-communist countries which in many respects meet the definition criteria adopted for developing countries. Rurality is one of such features. Its demographic, economic and social aspects allow to identify the country's system, and thus determine its specific problems and challenges. In the article we ask questions about life strategies taken up by young people from rural areas in the selected post-communist countries. In particular, we are interested in the youth's transition from education to employment, a critical moment for their further independence in life, marked by a high level of difficulty and risk of failure. How does the rural youth do it? What are their transition paths and where is their place in the social structure enforced on them by the reality of their country's political transformation? Do new life opportunities arise for young people as a result

of structural changes in the economy, and if so, then what are they related to? What jobs and social position can young people expect to have under the changing economic conditions?

The source data used for the analysis has been obtained under an international project of nine post-communist countries in Europe and Asia. Based on the available sources of information (monographs, national and international reports, official national statistics), we offer a multi-faceted description of the situation of younger generations. In the project, we ask about the possible direction of systemic changes if these could be defined, on the one hand, by younger generations and their innovative resources (new competencies, aspirations, life priorities), and on the other hand, by the capacity and limitations of the system within which they have to function. A number of questions has also been raised regarding, but without limiting to, the specific nature of rural areas². For the purposes of this article, we have decided to reduce the number of countries to be included in the analysis, focusing on those which allow to show the post-communist space as relatively homogeneous (post-Soviet block) on the one hand, while internally diversified, on the other hand. Eventually the following countries have been selected: Poland, Romania and Russia. While the demographic potential and thus percentage of rural population is similarly significant across all of these countries, they all have followed different paths in transforming their rural areas and agriculture. Their approach to structural changes, reforms and measures intended for this sector is different, just as is their vision of education and the role that it is to play in providing for social changes in the countryside.

1. Rurality and agrarian character of the analysed countries

One of the main challenges faced by post-communist countries at the beginning of their transformation process was to recompose their social structure, among others by launching new channels and mechanisms

² The complete analysis may be found [in] K. Szafraniec, J. Domalewski, P. Szymborski, K. Wasielewski, M. Wernerowicz (2017). *ME Generation in Post-collectivist Space. Dilemmas during the Time of Transition*, Geneva: Peter Lang International Publishing House (forthcoming).

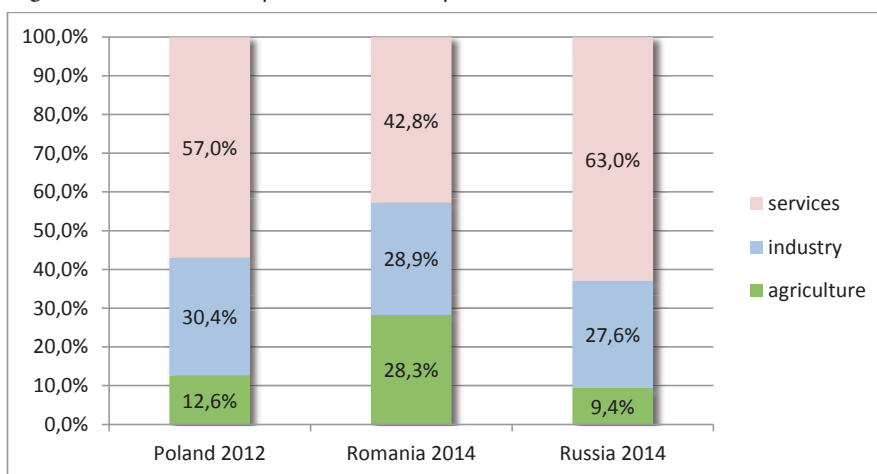
providing for social mobility. Particularly significant problems arose when people started abandoning agriculture for other professions, which resulted in mass migrations. In most developed countries, major metamorphosis of rural areas and agriculture occurred already a long time ago³. Post-communist countries are delayed and considerably diversified in this respect. Upon joining the EU, Poland had the largest percentage of peasant farms, which by then had nearly disappeared from the rural landscape of Western Europe. Since that time Polish agriculture has undergone a dramatic transformation driven by a combination of specific economic, social and political factors; nevertheless, still many problems exist that need to be solved (Wilkin 2007: 177). The countryside and farmers have become the main beneficiaries of the EU Common Agricultural Policy, which has had a profound effect on the condition and image of Polish countryside (Knieć 2012: 132-151). Romania is one of the countries where agriculture continues to play a significant role in the economy. It also relies on the EU subsidies, but these are much smaller and are differently distributed, with large-scale agricultural holdings being the main beneficiaries⁴. Smaller farms, or the countryside in general, benefit from the EU funds to a significantly lesser degree, which further cements their traditional character. Major problems are experienced by Russian agriculture. As a result of reforms applying free market principles to its agro-industrial complexes, the number of agricultural enterprises (*sovkhozes* or state farms, and *kolkhozes* or collective farms) has dropped by 56% (half of which are nowadays unprofitable), while the countryside has turned into a place offering practically no life prospects and struggling with serious social problems (Mukhanova 2014). In each of these countries, agriculture generates only a minor percentage of the GDP – in Poland it is 3.3%, slightly

³ Because of national differences in the characteristics that distinguish urban from rural areas, the distinction between the urban and rural population is not amenable to a single definition that would be applicable to all countries. National definitions are most commonly based on the size of locality. Population which is not urban is considered rural. <http://stats.oecd.org/glossary/detail.asp?ID=6342>.

⁴ In 2008-2013, the subsidies for agricultural holdings reached EUR 6,896 million for Romania and EUR 14,808 million for Poland (from: <http://farmssubsidy.openspending.org>). From 1 May 2004 to 30 November 2015, the total of EUR 122.45 billion of the EU funds was transferred to the accounts of the National Bank of Poland. In the same period, Poland paid EUR 38.7 billion to the EU, which results in the net balance of EUR 83.57 billion (see Nurzyńska 2016)

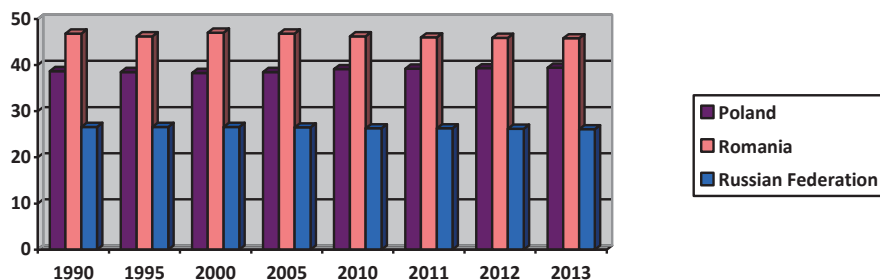
more in Russia and Romania (4.4% and 4.8%, respectively) (CIA database), enjoying a different position in the social and economic space. Romanian agriculture accounts for 28.3% of the total employment, while in Poland for 12.6%. In this respect, Russia is the least “agricultural” of the analysed countries, as its agricultural sector provides jobs to only one tenth (9.4%) of the employed (Figure 1).

Figure 1. Labour force – by sector of economy



Source: CIA database.

Regardless of differences, a significant percentage of the population in post-communist countries still lives in the countryside (rural areas). In this sense, Russia with only 26% of citizens living in the country is the least rural country. In Poland and Romania, this percentage amounts to 39.4% and 46.1%, respectively. For Russia and Romania, these ratios have been slowly but systematically decreasing, whereas in Poland the population in rural areas has been growing steadily since 2000 (UN 2014).

Figure 2. Rural population (% of total)⁵

Source: <http://data.worldbank.org/indicator/SP.URB.TOTL.IN.ZS>

Both in Russia and Romania, the percentage of children and young people living in the country is slightly higher than in the city, while that of young adults is lower. This basically results from young people's migration to the city. With the countryside generally perceived as a positive place with plenty of life choices, Poland is an exception. In Russia, in 2002-2010, the number of the population in rural areas fell by 1.2 million, whereby most of those leaving are young people (due to unemployment, lack of good job offers and life prospects) (Mukhanova 2014: 127). A similar trend is observed in Romania, although here the countryside often becomes a place of refuge for those who have not succeeded in the city (Tudor 2014; Catrina 2015).

As regards life prospects in post-communist countries, significant differences, both objective and subjective, may be observed between the countryside and the city. Generally, the countryside (particularly agriculture) is not considered to be a place offering good options for future life. However, it begins to be perceived as such by those who leave school prematurely or graduate from less renowned schools (negative motivation), or conversely, who recognise the countryside for its positive qualities, such as immediate access to nature, healthy lifestyle, professional self-fulfilment (positive motivation). Among the analysed countries, only Poland has managed to break the stereotype of the countryside as a lagging, underdeveloped region, limited to agriculture, offering no additional values (CBOS 2014).

⁵ Urban population refers to people living in urban areas as defined by national statistical offices. It is calculated using World Bank population estimates and urban ratios from the United Nations World Urbanisation Prospects.

Nevertheless, regardless of the country, young people from rural areas generally plan their future life away from the countryside. They are aware of the risks involved, particularly of those related to the labour market. Nowadays, these risks are present both in developed and developing post-communist countries, where unemployment together with precarious forms of work have become a natural element of social landscape, right next to job insecurity. Education seems to be perceived as a universal panacea to all these problems by the youth living in the countryside.

2. From education to employment – preparation and barriers

In all the analysed countries, the aspirations of young people in terms of their educational development are high. They may be observed both at the declarative level and in the actual decisions and educational choices. In European countries, a significant increase in this respect was observed in 2005-2010, i.e. until the saturation of the labour market with people with higher education, followed by the simultaneous drop in the numbers of students due to demographic decline. The rise in educational aspirations at that time was recorded particularly in Poland, where in 2009, as many as 91% of Poles believed that education was the ultimate goal, with 85% of adults wanting higher education for their children (CBOS 2009). Studies conducted after 2010 point to the evident cooling of educational aspirations among young people in many countries. This is visible both in opinion polls and educational choices. In Poland, the number of people who believed in education dropped by 9% between 2009 and 2013 (from 91% to 82%) (CBOS 2013). Repeated studies of educational trends among young people, conducted in Poland over the period of 2002-2015, reveal the same tendency. In the light of academic inflation and market saturation with people with higher education, young people's educational aspirations started to decrease. This trend is primarily driven by the drop in educational aspirations of young people from families whose social and economic status is either low or medium, i.e. mainly those from rural areas. At the same time, the educational aspirations of young people with a high-status background are on the rise, which may be observed both in rural and urban areas (Domalewski 2016, Wasielewski 2012). Russian studies show that the first decade of changes in education after the dissolution of the Soviet Union had a negative effect on educational

aspirations of young people from minority groups (living primarily in rural and peripheral areas), and consequently, on their educational choices and career opportunities (Prokhorova 2007). To a large extent, this was caused by a major economic recession which has destroyed much of the cultural and educational infrastructure in rural areas (Kalugina 2004).

Regardless of these adjustments, higher education is still on demand among young people in Poland, Russia and Romania, and it is (primarily) motivated by the need to find a well-paid and prestigious job (irrespective of the place of residence or social status). This is also the major factor behind parents' motivation to invest in their children's education and thus give them a chance to gain a better social and material position. The vision of difficulties in pursuing these educational aspirations would be a cause for concern for 54.7% of parents in Russia, 49.1% in Romania and slightly fewer (40.8%) in Poland (WVS 2011-2013). Education ensures better life options for young people in Russia, which is mainly verified by the labour market. A study conducted in 2014 shows that over three quarters (77.9%) of secondary school graduates consider higher education as essential for them to succeed in life. This opinion is shared by 70.5% of those in colleges which in fact are profiled institutions of secondary education specialising in preparing young people for semi-professions. However, even for those in vocational schools, i.e. schools which educate qualified employees for industry, agriculture and services sector, this figure was 43.1% (Konstantinovskiy & Popova 2015). This way of thinking among young people depends strongly on their social origins, place of residence and their choice of educational trajectories. "Worse" educational trajectories seem to be driven by an accumulation of unfavourable conditions which include low social status, ethnic minority background and living in rural or peripheral areas (Konstantinovskiy 2012). In the light of these tendencies, it is not surprising that non-typical forms of education are very popular among marginalised groups (e.g. young people from rural areas). They typically include remote education (where the number of students increased 11-fold, from 61,000 in 1990 to 672,000 in 2010) and the so-called post-matura education (mostly colleges). The both forms of education, to a large degree, account for an increase in higher education rates in Russia.

Undoubtedly, education has grown to be a fundamental value and a pillar of rural youth's life strategies, reflected not only in higher educational aspirations, but also in higher education rates. The range of this universal

trend has been different in different countries, and depending on their starting point (and local conditions) it has produced different social effects. Major educational progress has been observed among the least skilled in Russia and Romania. According to statistical data for these two countries, the proportion of uneducated people aged over 25 has reduced. The changes in this area are related to increased educational aspirations of younger generations (particularly in rural and peripheral areas), development of systems of higher education and generational changes in the structure of education (older generations are replaced by the younger, better educated ones).

Increased rates of education among post-communist societies are particularly evident for secondary and higher education. Over the period of only 20 years (between 1990 and 2010), the percentage of people with this level of education rose by 31.2% in Poland, 17.2% in Romania, and 16.7% in Russia. Particularly interesting is the rapid increase in the number of people with higher education (see World Bank Education Statistics), especially when analysed through the prism of generational changes. The comparison of the education rates in two age groups, i.e. people aged 25-29 and 60-64, reveals the scale of these changes and people's general tendency to shift from traditional, rural ways of living to those typical of open, urban communities. The reasons for these trends are relatively universal. They include as follows: the aforementioned high level of educational and vocational aspirations among young people, pressure to acquire the qualifications necessary in the labour market, and opening of education systems to young people from thus far marginalised groups (e.g. of lower social status or from rural areas), to a large extent inspired by the privatisation of higher education in most post-communist countries (OECD 2015).

In this respect, the transformation of the political system in this countries has resulted in increased educational (and social) opportunities for young people. As many as 44% of young Russians and 36% of Poles aged 25-34, have obtained their diploma of higher education (see OECD 2015:86). However, it needs to be remembered that it is mostly their families who pay for their education and educational success. Investments in education have been one of the main expenses of household budgets, both in the countryside and in the city, while a wide offer of non-state schools, established under the new law, has turned out to be a chance (mostly due to less stringent enrolment criteria) for young people from poorer families. This is especially visible in rural areas. In Poland, most students of non-state

schools of higher education are rural youth, despite their families' limited budgets and other expenses. Importantly enough, 30% of the rural youth who obtains higher education return to the countryside. Additionally, the countryside is nowadays also populated by young people of non-rural origin (Wasielewski 2013). Consequently, the structure of education in the population of young people in Polish rural areas (aged 25-29) looks much better than in the 1990s, with 26.2% of them having diplomas of higher education, 36.7% – secondary and post-secondary, 34.1% – basic vocational, and 7.4% – primary education (NSP 2011).

Russia has also experienced its educational boom which has resulted in improved structure of education among rural youth. Generally, complete secondary education, either general or vocational, has been obtained by the majority of people. After the illusion of the 1990s, when it was generally believed that no higher education was necessary to make a career, a dynamic increase was observed in educational aspirations of young people. Since 2000, they seem to have been able to better understand how the labour market changes and draw conclusions for themselves. By 2010, the number of students in Russia grew over 2.5 times. However, the participation of rural youth in these changes is smaller than that of their peers from the city. In 1994-2011, the number of young people (aged 15-30) with complete secondary education fell from over 50% to below 40% in rural areas. At the same time, the proportion of young people dropping out of school before completing their secondary education and taking up other forms of vocational training (people aged 15-22) increased from 23% to 37.2%. The percentage of rural adolescents entering higher education also went up from 11% in 1994 to 18.4% in 2011. However, this may not seem to be a great achievement considering the wide offer of non-state schools and that 64% of adolescents aged 15, and 78% of young people aged 20-24, declare that they want to go to university (Mukhanova 2014: 131-134). Importantly enough, even those who do take up studies generally end up settling down in cities which give them a chance for social advancement. Russian studies show that only 3% of graduates return to the countryside (Mukhanova 2014:134).

The situation is different in Romania, where people attend school just for the sake of attending school, and where, for a variety of reasons (ethnic, cultural, high cost of education, poor absorption of labour markets), young people not only do not aspire to higher education, but also drop out of school significantly more often before completing their education. In Romania, the

average rate of early school leavers is 19.1% (Eurostat 2015), and 27.7% for rural youth⁶. The secondary school completion rate is much lower in rural areas (71.4%) than in the city (94.7%). This is caused not only by the poor economic situation and low cultural capital of rural families, but also by the poor condition of the education system in rural areas and limited access to secondary schools (most of them are located in cities and therefore too expensive). As a result, rural youth most often opts for vocational schools, i.e. schools with a very low prestige in Romania (widely considered to be intended for “educational losers”), accounting for 2/3 of their students. The interest in completing secondary and higher education has dropped significantly – by approximately 10% over the last few years. In 2012, rural youth accounted for only 24% of all university students (Balica 2014). As many as 62% of the youngest countryside residents (aged 15-24) have primary education only, compared with 42% in the population aged 25-34, and 32% in the population aged 35-49 (Tudor 2014). As regards access to education and educational trajectories, significant differences may still be observed between different regions, as well as rural and urban areas. Metropolis and large city citizens are the most privileged population in this respect. Inhabitants of Bucharest are evidently more likely to study, while young people in Transylvania generally choose vocational schools. Differences between the city and countryside may also be observed in terms of private tuition/private lessons. These are clearly more popular among city dwellers (10.7%) than in rural areas (3.7%), which further contributes to inequality of their educational opportunities (see Umbreş et al. 2014: 66-72).

As may therefore be seen, while the system transformation might have brought institutional changes and affected young people's aspirations in terms of their education, social status, motivation for learning, and educational and professional preferences, it has never transformed the basic selection mechanisms responsible for educational choices. The level of educational inequality (measured by the distribution of years in education) is similar in all post-communist countries. Of those analysed here, it is the highest in Poland and Romania, and the lowest in Russia (see Human Development Index). At the same time, the PISA studies (measuring school pupils' scholastic performance) show that the percentage of resilient students, i.e. pupils who

⁶ In contrast, the rate of early school leavers in Poland is 3.8%, and in rural areas it is 6.1% (and it tends to decrease).

come from disadvantaged backgrounds (low socioeconomic status, rural origins), yet exhibit high levels of school success (measured by the PISA tests), is the highest in Poland (8.4%), while in Russia it is 5.2% and in Romania only 2.8%. On the one hand, this indicator reveals the systemic quality of school education which allows to overcome class differences (and thus not to waste talents of children from socially disadvantaged backgrounds), while on the other hand, it points to the relatively egalitarian nature of the education system whose open structure gives a real chance for social advancement through education (OECD 2013).

Regardless of the effort invested, a large number of the young people from post-communist countries who opt for education (higher education) end up being disappointed. The diploma, which was supposed to be a guarantee of job security and social advancement, particularly important for rural youth, is proving to be increasingly insufficient. Employment opportunities for people with high formal qualifications are limited due to the difficult situation of post-socialist economies, but also due to inadequate educational offer which does not correspond to the labour market needs, and due to people's exaggerated belief in the power of the diploma (credentialism). This is demonstrated primarily by young people from families with no traditions of investing in higher education, preferring easily accessible schools which follow lower standards and offer easy-to-acquire, but practically worthless diplomas. Non-state institutions of higher education, which have developed their networks in all post-communist countries, have paradoxically turned into an offer addressed mainly to young people from poorer, i.e. also rural, families. In all the countries, people complain about poor effects of their work. State schools are also more and more heavily criticised, as they find it difficult to adjust to the new reality and define their own role. Similar problems are faced by the sector of vocational education and vocational training courses. The career counselling system (educational and professional coaching) is ineffective despite its importance in the times of unpredictable labour market conditions, particularly for young people who, knowing nothing about themselves, social needs and future trends, often make ill-considered choices. This is not so much the case of young people in the city, especially those from rich families, whose educational strategies are carefully thought out and planned from early on. Nevertheless, in post-communist countries, both in rural and urban areas, investments in education have a generally more compulsive character than in the West.

3. Entering the labour market and employment

Transition from education to employment is defined as a period in which young people should “theoretically” complete their formal education, find a job that matches their qualifications and gain financial independence⁷. In reality, there are many different career paths. Studies are combined with part-time jobs, whereby formal education is replaced or supplemented with training courses, internships and coaching. These new solutions prolong the moment of the actual transition, turning it into a sequential process. Continuation of studies, taking up family responsibilities in the meantime, educational breaks and stalling, etc. are nowadays generally popular strategies in all countries. They are also common in post-communist states, whereby major differences may be observed between the European and Asian ones.

In Europe, transition from education to employment is getting delayed, as the whole process becomes more complicated and takes a longer time. Different paths of transition, related either to long (typically due to acquiring professional experience) or short education process (which does not bring the desired qualifications), trigger different types of problems. The former is responsible for overeducation and contributes to underemployment. Conversely, the latter causes undereducation, where the level of qualifications and education is insufficient for the current market needs, which in turn results in constant balancing between temporary forms of employment (in the sector of informal employment or grey market) and unemployment. Studies carried out in Central and Eastern Europe show that overeducation is more prevalent than unemployment among university graduates. This problem is present in every (post-)communist country, with rural youth taking up this path more and more often (Ilieva-Trichkova, Boyadjieva 2014). According

⁷ The following stages of transition have been defined: “A young person who has ‘transited’ (completed their labour market transition) is defined as one who is currently employed in (i) a stable and satisfactory job, (ii) a stable but non-satisfactory job, (iii) a satisfactory but temporary job, or (iv) is self-employed and satisfied with their job. A young person is considered ‘in transition’ if he or she is either (i) currently unemployed (relaxed definition), (ii) currently employed in a temporary or non-satisfactory job, (iii) currently self-employed and unsatisfied, or (iv) currently inactive and not in school, with the intention of looking for work later. A young person who has ‘not yet transited’ is one who is either still in school (inactive students) or currently inactive and not in school (with no intention of looking for work)” (ILO 2015b: 28).

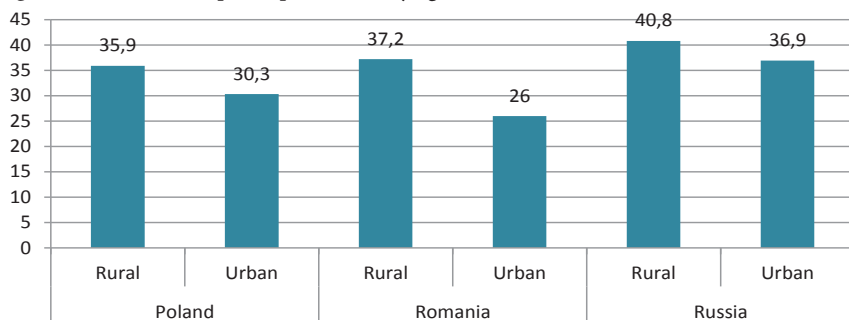
to the School-to-Work Transition Survey (SWTS), it is particularly evident in Russia, where young people from the city are more likely to have a stable employment or a satisfactory temporary job than rural youth who tend to be economically less active or prefer to continue their studies in the city (ILO 2015b: 57-58).

Agriculture, which still at the end of the 20th century would incorporate any extra labour force and thus provide an alternative to (official) unemployment, today is no longer an option even for rural youth. In Poland, the agricultural sector employs less than 8% of the young workforce, in Romania over 22%⁸. In Russia, it is at the level of 15%⁹, which constitutes a dramatic drop over the last 12 years – the average annual outflow of young people from agriculture is estimated at 400,000, and it significantly exceeds the average for the total population leaving this sector (Mukhanova 2014: 129).

In the analysed countries, the percentage of people active in the labour market is higher for rural youth (by several to a dozen or so of percentage points). This may be due to three reasons: firstly, lack of optimal conditions to continue education; secondly, high demand for unqualified labour force; and thirdly, due to financial pressure (one's own or from the family). The causes are not mutually exclusive; in some cases they can accumulate, making it even more difficult to find a decent job.

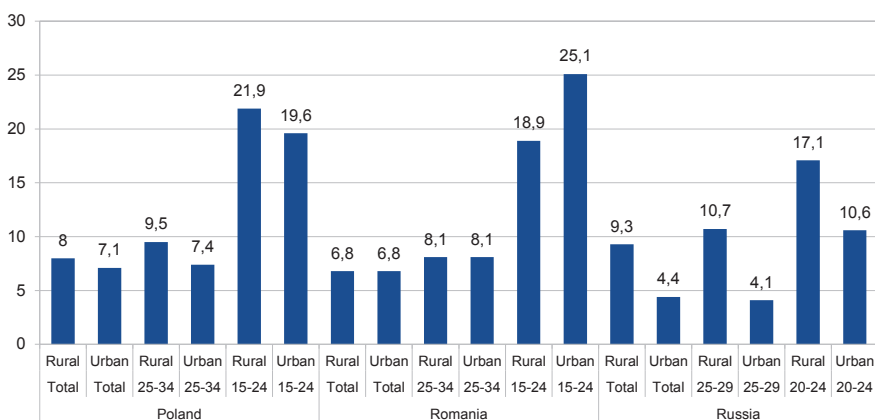
⁸ Own calculations based on the EUROSTAT data. It is worth mentioning that despite differences across European countries (e.g. the already quoted high proportion of young people working in agriculture in Romania), the average rate for the European Union is 3.4%. This points to large discrepancies in the employment structure between Western Europe and post-communist countries. Once again, a big disparity may be noticed between the high proportion of young people working in agriculture and the role this sector plays for the Romanian economy. Based solely on this observation, it may be assumed that the conditions of work in Romanian rural areas may differ from what young people would imagine as decent work.

⁹ Global Employment Trends for Youth (ILO 2015).

Figure 4. Labour force participation rate by age (15-24) and area of residence in % (2015)

Source: Ilostat database

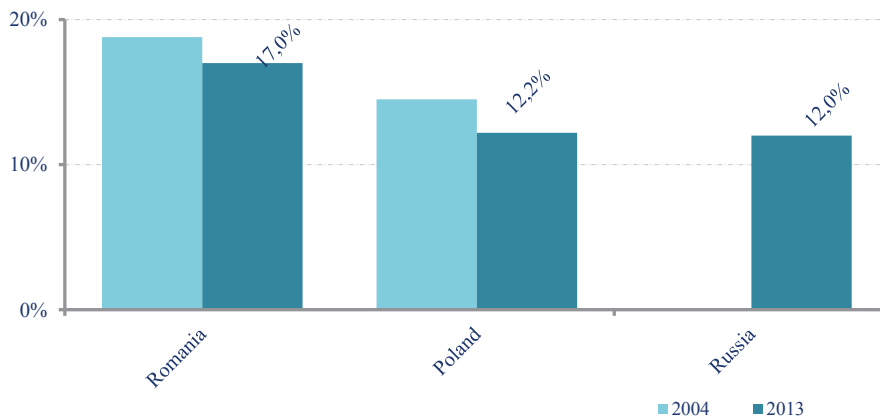
In countries with traditional agriculture and limited absorption power of urban labour markets, the rates of official unemployment among youth in rural areas are lower than in cities. Farms provide protection to young people, offering them a relatively safe harbour where they can wait through rough times. This is for example the case of Romania (Figure 5). In countries whose countryside is not primarily agricultural in character and where work in agriculture does not seem to be an alternative (as such is sought in other, non-rural markets), unemployment rates among young people are higher (Poland, Russia).

Figure 5. Unemployment rate by age and rural / urban areas in % (2015)Source: ILOSTAT database, Mukhanova 2014: 130¹⁰.

¹⁰ The data presented for Russia comes from April 2013. "Total" refers to the population aged 15-72.

The problems of unemployment and shrinking workforce resources are further exacerbated by the increasing numbers of economically inactive people. Unlike unemployment, economic inactivity may result not only from objective but also from subjective reasons. Young people who fall within this category has been collectively referred to as NEETs (the acronym from *Not in Education, Employment, or Training*). Rates of NEETs show the percentage of young people who are at risk of being permanently excluded from the labour market. According to our analyses, the high and relatively stable representation of NEETs is typical of all post-communist countries (Figure 6), with their numbers being generally higher in rural areas, as revealed by our detailed (local) analyses.

Figure 6. Participation of young people aged 15-24 in the category of NEETs



Source: Own materials based on the ILOSTAT database.

Worse conditions on rural labour markets force young people towards non-standard forms of employment. Most frequently, they opt for the sector of informal employment. This strategy is particularly widespread in Russia, where in 2011, 40% of young people aged 15-24 and 30% of those aged 25-29, were in informal employment (compared with 24% in older cohorts). For 33% of young people, this sector was the main place of employment (and probably the main source of income). In rural areas, 87% of young people work in the informal sector – these are mainly people with incomplete secondary education (Mukhanova 2014: 144-145).

Conclusions

Transition from education to satisfactory employment, which today takes up nearly the entire third decade of young people's life, is just an external manifestation of changes that occur in labour markets around the world. In post-communist countries, the burden and risks related to this process (unemployment, together with its new, post-modern variant, i.e. variable, pluralistic forms of part-time, temporary forms of employment) are borne by people rather than institutions. Based on the analyses conducted by us under the international project of nine post-communist countries, we have asked how rural youth manages in the face of these changes? What are their transition paths (from education to employment), and what is their place in the social structure enforced on them by the reality of their country's political transformation?

In developed European countries, changes in the labour market result in a different (more pragmatic) approach to education, translate into more refined educational strategies and prolong the time spent in education. In post-communist countries, a similar response may be observed, but more rigid and compulsive in character, particularly visible in populations in which investing in education never was a cultural norm. The difference is perfectly illustrated by representatives of lower social classes (including rural youth) and their faith in the power of the academic diploma (regardless of its quality). In post-communist countries, it is a common practice among such youth to enrol at easily accessible schools and universities, where requirements for students are not very high. These are typically non-state institutions of education which started appearing in every post-communist country after the political transformation. By graduating from them, young people might be given a chance for social promotion, but at the same time they need to remember that they are at a greater risk of worse job offers and possible longer experimentation with different professional functions, which in consequence may not provide for a satisfactory career path.

However, most of rural youth do not go to universities. They finish their education at a very low level, drop out of school prematurely (typical of Romania) or opt for vocational education (as in Russia or Poland). Entering the labour market is even more difficult in the case of these education paths. In all the post-communist countries analysed in the article, the countryside generally loses to the city and the opportunities that the city offers to young

people. This process is, on the one hand, further driven by the culture of consumerism (brought to rural youth by modern media), and on the other hand, by the aftermath of the system transformation and insufficient modernisation of the agriculture, and rural sector in general. The cases presented in the article reveal certain similarities, but they point to even more differences resulting from the specific character of systemic changes in the respective countries, subsidies available to agriculture and rural areas, and competitive offer of the city. In Russia and Romania, the desire to leave the countryside is very strong among young people, but effective migration turns out to be possible only for some of them (despite the invested funds). In Romania, young people tend to return to the countryside (due to their negative experience of economic migration). Among the countries subject to the analysis, Poland is the only one in which the new educational offer and all the aspects of rural life are viewed so positively, on a scale unmatched by any other country. Nevertheless, even here young people believe that better life opportunities can be found in the city, which is where they take part in the competition for a better employment.

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Social Innovations for the Disadvantaged Rural Regions: Hungarian Experiences of the New Type Social Cooperatives¹

Abstract

The study explores the spatial specificities of the new type of social cooperatives, with an emphasis on assessing the dichotomy appearing in relation to advanced and disadvantaged areas. It also looks at the features of operation, employment role and long-term sustainability, proposing support and further development opportunities. The key goals initially set of the cooperatives have not yet been implemented uniformly. They could not have met the requirements of significant development in local economy, enhancement of self-sufficiency and the transit role entailing labour market reintegration. However, they have already fulfilled the social objectives; namely, long-term local employment almost completely. The problems are mainly caused by lack of capital resulting from the lack of creditworthiness and the difficulty of further expansion of market opportunities. For further development, new, preferably county or national level markets should thus be targeted. Hence, to achieve favourable changes, the development of well-founded marketing strategies will be necessary.

Keywords: labour market, social cooperative, disadvantaged, employment, sustainability, Hungary

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1. Introduction

The research results focusing on hyphenated public work (Tésits and Alpek 2014a; 2014b; 2015), raises the question of what the long-term aim of the agricultural programme may be, as it is the most popular of all the eight piers of the “Start” work programme. Although there are considerable regional variations, on the national level, one-fourth of the public workers still participate in activities connected to crop production, animal farming or traditional preservation work. In the case of the agricultural tier, Transdanubia (primarily Győr-Moson-Sopron, Veszprém and Tolna Counties) is represented by a smaller number of settlements but a significantly higher rate per settlements, while in the North Great Plain (mostly in Jász-Nagykun-Szolnok, Szabolcs-Szatmár-Bereg and Hajdú-Bihar counties) more settlements share the values otherwise higher than the national average (Angyal and Oszi 2013; Artner 2013; Bagó 2013; Koltai 2013; Kulinyi 2013; Olah 2012; Zemlenyi 2013).

The popularity of the public employment programme in the aforementioned regions is not surprising, as it takes into account the local conditions in combining both large-scale agriculture and backyard farming by unique products and the highest possible degree of processing. Thus, in the most disadvantaged regions, they offer solutions to people with low qualifications which theoretically secure their livelihood on the long run; this is accompanied with additional practice-centred training. However, if the aim is merely the education of only self-sustaining backyard farming and the related skills, then the marginal position can be conserved. Combined with the inexpensive labour force, this can improve marketability only in the short run. Therefore, the pivotal question arises: how is it, if at all, possible to offer permanent employment opportunities that take productivity into consideration?

The decision on subsidising the establishment of new type social cooperatives was made in 2012, while its first phase affected 47 of the most disadvantaged sub-regions in Hungary and 800 such settlements where the population is less than 5,000 and they could not make an advance in the traditional grant schemes. Hence, 5 million forints were planned to be allocated to the newly established social cooperatives on condition, among others, that they would try to include all the disadvantaged families living in the smaller settlements. According to the plans, the phase after the initial

years will be subsidised by 15 million forints and, in the third phase, the sum of the grant will grow to 50 million forints to support cooperative activity taking the form of small-scale workshops.

In 2013, under the auspices of the New Széchenyi Plan, subsidy grants from the Social Renewal Operational Programme (TAMOP) were announced to develop the social economy. The subsidising of the social cooperatives to achieve self-support has a distinguished role in this programme. The grant subsidises newly established social cooperatives to further the regional development of the self-support of disadvantaged individuals in lack of employment or steady livelihood. Thus, the inhabitants of the disadvantaged regions will have the opportunity to join such an economic and productive community in which they can earn their everyday living.

This study aims to survey the founding conditions of the new type social cooperatives established after 1st January 2012, assessing the regional consequences of their activity and their possible role in employment and reintegration. In addition, a further goal was formulated which was set to map those resources that can support regional development and the improvement of the standard of living. Along with the afore-mentioned aims, one of the most important goals will be the examination of long-term sustainability considering such factors as the permanent and revolving demand for the products or services and the catchment area. These are indispensable for survival in the market or possible further development and growth. It was considered necessary to cast a light on the efforts that can secure economic survival and self-sustainability without subsidies and grants.

2. Literature background

In addition to reviewing the several decades of development of the social cooperatives (Nasioulas 2012), the European studies dealing with the social cooperatives published after the turn of the millennium draw attention to the importance of the essential social/welfare services of these organisations and the role they play in integrating disadvantaged people. They emphasise the ability of the sector to realise much wider social projects than earlier (Thomas 2004).

Other studies show the importance of the added value of cooperatives in a world characterised by state overload, globalisation and increasing social

and political fragmentation. They highlight those – mainly legal – changes that have increased the sector's production and competency in social services (Gonzales 2007).

The latest results not only classify the social cooperatives, but they point out the problems that mainly come from their underdevelopment and small size, adding that their potential is enormous regarding their employment role (Osti 2012). These studies demonstrate the specific types of cooperatives (green or agro-food organizations) and their problems too. The most critical issues of the latter come from market difficulties (Giagnocavo 2012). Despite these problems, studies emphasise the growing socio-economic role of these organizations in Europe, particularly in the strengthening of local economies (Borzaga et al. 2014; Defourny and Nyssens 2008; Nyssens 2008; Birkhölzer 2008; Borzaga, Galera and Zandonai 2008; Fraisse 2008; Les 2008; Liveng 2008; O'Shaughnessy 2008; Pättiniemi 2008; Perista 2008; Pestoff and Stryjan 2008; Spear 2008).

Much of the literature deals with the Western European model. However, the results from the Central European models may be useful for a pan-European development of the third sector. The present study is innovative because it reveals the possibilities of social cooperatives in the future development of the disadvantaged rural areas of East-Central Europe, as well as investigating how they can take advantage of these opportunities.

Regarding the afore-mentioned issues, the first Hungarian comprehensive research was conducted by the Budapest Business Development Research Institute in 2010 (Petheo et al. 2010). Beside theoretical issues, the study dealt with the assessment of European policies related to social economy and cooperatives, assessing the EU survey results carried out so far in connection with the third sector and placing a special emphasis on such European examples that focus on the furthering of the operation and support of social cooperatives. It surveyed the activity of the social cooperatives before 2010 and highlighted those areas which might offer an opportunity for the Hungarian social cooperatives to gain momentum. When evaluating the Hungarian conditions, the survey took into account the chances of relying on extended amounts of EU subsidies.

More recent findings in the field were published in 2011 and these included the experiences of the first subsidy programme that encouraged the initial steps of setting up social cooperatives (Simko and Tarjanyi 2011). The study revealed that the legislative environment in Hungary did not support but

rather discouraged social cooperatives. In addition, most of these organisations were not cautious enough to assess the market demands and their business plans were not sound enough. In addition, these factors contributed to the equity gap and temporary liquidity problems that characterised most of the cooperatives. The financial hardships were combined with seriously incapable or unprepared managers and these issues were further aggravated by the fact that a considerable proportion of the advisers and mentors were unpractised. Aside from the problematic issue of human resources, the employee morale and the motivation of the often unemployed or disadvantaged members was not adequate, as these people mostly had an employee attitude instead of the attitude of cooperative membership or ownership (Soltesz 2012; Simko and Tarjanyi 2011).

The experiences of the next, EU-funded programmes have confirmed the results of the earlier survey which found that the management of a portion of the freshly registered social cooperatives had not possessed the necessary skills before application. In addition, a proportion of the TAMOP-grantees were backed up by entrepreneurs and managers with material and financial reserves, who saw an opportunity in this type of support and business operation. The other part of the successful grantees had an advantage due to their earlier project management experiences and their established market connections, or their choice of a better and more innovative activity. In these instances, there seemed to be a higher chance of ensuring project sustainability in the long run.

These assessments also included regional characteristics. They found that the regions which are more disadvantaged in the labour market (North Great Plain, North Hungary), probably due to understandably higher application activity, were already overrepresented at the time of the research. The regional distribution of the successful applications along settlement types have also revealed a remarkable pattern. In the smaller settlements, it is very hard to find other marketable activities for the social cooperatives, as these application types exclude agricultural activities. A further regional consequence was found, i.e. the market of the products and the services were generally not restricted to the settlement or the sub-region, but the social cooperatives found the market gaps and aimed at the markets in a wider geographical area.

The TAMOP-grant structure had a substantial advantage over the earlier ones, as the founding members seemed to be more unified, skilled and

practiced than in the case of the former subsidies. Insecurity was more prone to emerge from the fact whether the management can successfully integrate and motivate the disadvantaged into appropriate employee status and actually ensure their process of becoming self-employed. Based on the desk research of the literature it can be declared that the new type social cooperatives – although their establishment was firstly induced by the motivation to get subsidies and most of them could not establish good partnership with the local government – can become good examples of innovation for the Hungarian business practice. Although it is still pending if the social cooperatives are sustainable in the future, most of the organisations are positive about the long-term sustainability of their activities. To achieve the above, innovative ideas, market gap-filling services and good local relations need to be supported by further government subsidies and concessions (Simko and Tarjanyi 2011; Soltesz 2012).

3. Research methods

In the research of the different regional opportunities of the social cooperatives, both primary and secondary methods were used. The desk research included the articles and studies published after the legislation on social cooperatives came into effect in 2006. The primary studies were partly based on the secondary database of the National Association of Social Cooperatives that kept record of the registered organisations.

The target group of the questionnaire-type survey was selected from more than 1500 new type social cooperatives and 326 – one-fifth of the whole range – which were chosen on the basis of the location of their headquarters in a settlement in one of the MD (most disadvantaged) sub-regions. The questionnaires were allocated to the entire target group and a valid response was provided by 132 organisations. The questionnaires and the evaluation have been built up according to the following structure. We evaluated the founding circumstances of the new type of social cooperatives, their activities, employment capacity, special resources, long-term sustainability opportunities and the demand for their services, as well as their cooperation ability and willingness.

The activity of these organisations is not exclusively attached to the primary sector, let alone the fact that more than 60 percent are service providers

based on their classification of business (TEÁOR—Statistical Classification of Economic Activities in Hungary), while only one-tenth operates directly in the agricultural sector. The former group is larger and includes community, social and free-time activities, social and health care services, education, cleaning, advising, personal or accommodation services and commerce. The primary branch is comprised of crop production and animal farming, fruit and vegetable processing and preservation, forest product gathering, forestry and forest cultivation activities. The processing industry organisations primarily manufacture light and food industry products and, in a smaller proportion, chemical industry goods.

The spatial distribution of the surveyed organisations is also versatile, while two-thirds of the cooperatives in the MD-regions have their headquarters in North Hungary (predominantly in Borsod-Abaúj-Zemplén County), the remaining one-third can be found in equal measures in South Transdanubia and the Great Plain.

4. Results

4.1. Sectoral and regional aspects in the establishment of cooperatives

The majority of the social cooperatives examined in the present study were founded in 2013. The economic reasons and motivating factors behind their establishment were local, unsatisfied demands on production or service. Such demands primarily concern the purchase, processing and/or sale of locally produced raw materials, vegetables and fruits. This is not surprising because individual products manufactured in low quantities in any product group have a competitive disadvantage on the market due to regulation difficulties, unfavourable taxing, legal and bureaucratic jungle. In each case, crucial social factors come into play, such as the need for value creating local and regional jobs, providing income for the disadvantaged and the development of their social status and living standards.

However, the establishment of a social cooperative can also be initiated by political intent, as in many cases the development strategy formulated by the leaders of the settlement organically includes job creation, the improvement of self-support or the development of the local economy. If the missing resources and the investors cannot be attracted from the outside and

there are no significant subsidy opportunities then, by mapping the resources the region has and finding the ways of their use, the local operators should be supported in satisfying the needs of the inhabitants. In the disadvantaged regions examined, the traditional tools of economic development did not have significant results. In this instance, strategies do not only aim at economic development, but they focus on social improvement on a wider scale that includes the improvement of the quality of life and community development.

Several factors have contributed to the establishment of social cooperatives. Arguably, the most substantial one was the opportunity to obtain the subsidy of the grant promoting the development of social economy. This sum gave a large enough incentive to launch the social cooperatives that was supported by local government activity, including agile enthusiasm, with earlier experiences in value creating public employment, legal expertise, positive examples and the operating patterns of successful, nearby cooperatives. The “Start” model work programme has created similarly advantageous preconditions, whose support formed an excellent foundation for value-creating establishment and the development of an increasingly market-based activity. Agricultural production is frequently not governed by market demand; thus, the most general example of such a connection is when the goods are provided to the consumer in a controlled way to evade sale difficulties, i.e. agricultural raw material production that has already started in the sub-regional programme is complemented by processing with a more sophisticated infrastructure or involving retail/wholesale trade (e.g. in Kérsején, Berekböszörmény etc.).

The initial goals were naturally rather than evenly accomplished. While the freshly launched cooperatives fully met the social aims and most of the requirements of permanent local employment, they have rarely matched the need for a substantial development of the local economy or the enhancement of self-support and a transitory role i.e. through reintegration into the labour market, sustainability, continuous development or the encouragement of entrepreneur attitude.

The choice of the principal and secondary activity of the cooperatives was influenced by numerous factors. Adapting to the agricultural production traditions of a given region or the existing infrastructural foundation with the traditions of industrial production – or earlier investments encouraging vegetable and fruit production, food industrial processing and trade – was an advantage in the manufacture of ready-to-wear clothes, outerwear, working

clothes and accessories. Satisfying local demands on uncovered services was of an extraordinary importance in choosing the activity types of the organisations dealing with public space maintenance and general cleaning. The appreciation of the need to keep the public spaces in an appropriate state is not surprising, being that environment protection and the quality of individual's life are becoming more and more important as issues nowadays, particularly in those settlements where the development of tourism is a significant factor of the mid-term plans. In the case of labour-intensive activities, skilled and available work force and the involvement of the highest amount of people possible were decisive factors when the organisations opted for light industry, ready-to-wear and joinery activities.

4.2. The role of cooperatives in employment

Almost the entire range of employees in the social cooperatives examined consists of members of a disadvantaged group. Women are overrepresented in these cooperatives because of the dominance of sewing, ready-to-wear industry, trade or agricultural activities. Male dominance can be observed primarily in activities connected to the construction industry. The employees of these organisations are middle-aged or people older than 50; most of them have primary and secondary education qualifications. The tasks that they cover primarily require skilled labour. The cooperatives mostly employ older but active individuals (25 percent), people with low school qualifications, women and Roma people (25 percent). First-time employees and disabled individuals come at the end of the line in a proportion of less than 10 percent.

Thus, the living conditions of disadvantaged employees can improve in the settlements concerned. Moreover, these employees can advance their living conditions who want to draw an income based not only on their skills and experience but their industriousness and motivation as well. Their proportion is dependent on the size of the settlement, as the average number of the employees at a cooperative is 20, which might as well amount to less than ten workers or, less frequently, a staff of 100 people. This will not solve the labour market problems of a bigger village or a smaller city. However, in small settlements with less than 1,000 inhabitants where the number of the active population is less than two-thirds of the residents and the proportion of the registered unemployed persons is less than 10 percent, while the presence of the cooperative can offer significant stability throughout many

years. As the average number of members in the organisations is relatively low, they generally employ the local work force. Nonetheless, organisations with activities that require more employees can have an influence on the labour market status of more settlements in the region.

According to the organisation leaders, most of the employees are motivated. Less enthusiasm is usually the consequence of despair resulting from poverty, hopelessness and the lack of long-term planning. Discipline problems (absence, improper work, abuse) are very rare. The gross monthly salary of the employees is over 100,000 forints, which exceeds the minimum wage by a couple of percent, but it is still 40 percent more than the public work salary. The employers also try to increase employee motivation by free-of-charge trainings, cash benefits, bonuses or the creation of positive workplace atmosphere, which also includes both understanding and appreciation.

Nevertheless, the goal of recruiting cooperative members is less fulfilled, while the process of becoming self-employed is practically undetectable. The main reasons for the latter case are naturally the lack of market opportunities, the risk-avoiding attitude of the employees, a short business history and the principal business activity of the cooperative, which barely supports self-sustaining forms for the individuals (textile- and ready-to-wear industry, public space maintenance etc.). This rate will grow with time, even with these cooperatives being primarily capable of employing the disadvantaged, being that the individual lack of assets and the risk the individual must take are moderated and responsibility is shared.

The cooperatives examined cannot be classified as employment cooperatives. Therefore, their profile, without exception, is set to permanent employment. Employment is generally supplemented by training, which increases labour market opportunity through providing on-the-job qualification skills (e.g. vegetable- and fruit processing) to a smaller extent, while the development of communication and acquisition skills, IT-knowledge, personality and self-awareness is pursued to a higher degree.

4.3. Special resources needed for permanent employment

When evaluating the classical resources, half of the cooperative managements reported that the capital necessary for the operation of the organisation is just the amount needed, while they cannot provide sufficient resources for the maintenance and development of the material assets and tools. Those

who feel that capital resourcing is a substantial problem must face several difficulties. However, these hardships are not activity-specific as they also inform garment and joinery industry organisations and trade cooperatives. Naturally, there are differences in the inner structure of their activity profile, as most generally raw material production and manufacturing are less profitable than trade activity.

At the same time, one of the most substantial problems is the lack of consumer demand for service or products, which is exacerbated by a low level of solvency or the unreachability of consumers. A portion of the goods are thus left unsold. Similarly, it causes sale and liquidity drawbacks if the target market consists of local people who can hardly produce the consideration of the services offered. In the background of the problems with capital supply and liquidity, weak grant application activity or insufficient managements can be found which, in the early years characterised by lower market and trade revenues constitute the main resources of the cooperatives particularly because, at this early stage, the organisations do not yet have financial reserves. If there is a financially sound market demand and the revenues are primarily based on business activity, then the vicinity of a competitor on the market might constitute a problem, if it is larger, more liquid and more experienced in the market. It can thus achieve higher cost-effectiveness.

More than two-thirds of the respondents have considered the material assets needed for the activity suitable, but their maintenance and development would be relevant and required. However, the development of the infrastructure and the vehicle fleet will need the acquisition of further markets and grant subsidies. In the assessment of the human resources, the weakest point proved to be the skills, competence and community attitude of the employees. Nevertheless, in several cases their reliability and flexibility in need was highlighted as positive traits. In the self-assessment of the leaders, biased evaluation cannot be fully excluded. However, skilfulness and competence received similar lower points, while community attitude, reliability and motivated work have proved to be the strength of all management.

Placing the resources into a wider context, more than two-thirds of the management committees of the examined cooperatives consider their activity to contribute to the development of the disadvantaged settlement/region. Most managers associate this with the direct socioeconomic effects, which is manifested in the reduction of unemployment and the improvement of the

social status of the residents. If these goals are achieved, then the burdens of the local government can decrease and development can be more easily carried out. According to this argument, the operation of the cooperative can indirectly influence the evaluation of the settlement. The good example can hopefully attract further businesses, while it may also trigger the establishment of new ones, which results in more income from local government taxes. The development of the local economy might as well have an indirect, community shaping effect.

Improving the living conditions of the inhabitants can be attained by other means, as well. It can include operating social shops as well as the maintenance of public spaces in the settlement or locally producing food raw materials that can offer good-quality, healthy and safe supply for catering. Besides carrying out other tasks important for the local communities, a portion of the cooperatives have community development and cultural activities. They organise social events and gastronomic festivals, or they can perform traditionalist activity by operating village cultural centres and so contribute to the strengthening of local identity, which can indirectly help retain the population. Even the community developing effect of the group leisure activities organised for the employees can be substantial in a smaller settlement.

Most of the social cooperatives have placed an emphasis on environmentalism and sustainability, as beyond the basic, legal directives they can also reduce the burden on the environment by traditional craftsmanship activities, environment-friendly and planned fertilisation, organic product processing, using green packaging materials and non-chemical preserving processes based on heat treatment. These processes are combined with low “food-kilometre” values, which save fuel and render the use of packing materials, preservatives and additives unnecessary. Environmental sustainability is enforced in the use of organic wastes of natural origin (agricultural, horticultural and green waste) as, after composting, they are suitable for soil-conditioning.

4.4. Long-term economic sustainability

The annual revenue of the social cooperatives surveyed, which was carried out in the year when the actual service was launched, immediately after it was established, ranges on a very broad scale, from a couple of million forints to 40

million. The higher income here is exemplified by organisations dealing with green space maintenance or vegetable and fruit wholesale trade. However, the distribution of the revenues is not so versatile; in most of the cases, the income of trade, productive and service activities do not exceed half of the whole amount, so the larger part is provided by state or grant subsidies. If local government does not contribute to their solvency, then these organisations do not have any financial reserve apart from the venture capital and grant subsidy in the classical sense. It should be added that, without an unrealised income, setting up solvency and operational reserves is not a prerequisite in the first year of the business.

The market is characterised by the fact that, even in the disadvantaged settlements or regions, there was demand for the services and products of more than two-thirds of the cooperatives. Solvency is a little lower compared to the demands, but, according to the management structures, it has a continually decreasing tendency. The lack of solvency is especially characteristic of the demands of the residents. If the small or middle-size enterprises or the state/local government have a demand for the products of the cooperatives, then the problem is naturally less definite in a financial sense. The proportion of those cooperatives is nearly identical which have difficulties in reaching their potential buyers and whose products are well defined. Where the activity has precedence – for example, production in the “Start” work programme – then the goods are introduced into the market therefore they can be more successful. More than half of the cooperatives would be unable to offer more products/services at the current price, but neither are they forced to retain their goods in stock.

The structural and regional distribution of the demand is governed by definite tendencies. In the initial years of business, the local and sub-regional demand, nearly to the same extent, exceeds two-thirds of all the demands, while on a county, regional or national level, it is only around 10 percent respectively. In sum, the consumer and market sphere demand is dominant (48 and 42 percent), while that of the state/local government is as little as 10 percent. As the local demand is primarily connected to consumers, it is the SMEs and, to a lower degree, local governments that are potential buyers from an extended area.

The relationships outlined above are backed up by the satisfaction evaluations on the quality and spatial distribution of the demand. The satisfaction with the quality and spatial distribution is higher if the product

or service sales are directed at the market sphere or the level above the local market, i.e. the sales are geographically more extended. As opposed to this, dissatisfaction is greater if the sales are restricted to the satisfaction of local consumer demands with less purchasing power. Evaluating the future trends of sales, the local governments believe that the purchasing power will keep its level, while they are more optimistic about the number of customers and their expectations are justified in this early phase of business activity. Predominantly those cooperatives belong to this group that offer a market gap-filling product or service. Nearly half of the examined organisations belong to this category, while their activity is more excessively based on a real market demand surveyed beforehand.

A little more than half of the cooperatives think that *their revenues* obtained from market-based activity *is insufficient* to pay for the expenses and that the missing amount should be covered by more substantial grant subsidies or other sources. In summary, one of the most important problems is insufficient capital and solvency, as it slows down the business activity and hinders meeting the requirements for quality. All of these issues result in a significant competitive disadvantage compared to that experienced by larger companies. Even business ventures with more favourable market conditions could not finance themselves without grant subsidies. This is a crucial point as they cannot afford developing although the continuous maintenance and servicing of the infrastructure and the machinery would require this. In the initial one to one-and-a-half years, there was only a one-time opportunity, via the starting TAMOP grant, to obtain resources for the acquisition of machinery, tools, equipment and building renovation. The development did not directly generate the creation of jobs, as even the renovation tasks were carried out by entrepreneurs. Thus, the number of employees practically corresponds to that of the grantees of the starting subsidy.

There is substantial *difference of profitability* between the producer and trade activities in favour of the latter. In this case, it should be considered that the organisations have just started their business activity. Thus, a portion of the agricultural activity needs a shorter or longer transitory period to produce results, while trade activity also needs time for establishing the markets and advertise the manufactured goods. In addition, the lack of capital is combined with the burdens of local employment and the resulting weak purchasing power and the price sensitivity of the consumers.

The productivity of the organisations is apparent in the *finished business plans*. Almost one half of the managements think that they could not create a sound strategic document which may be caused by the short deadline of the grant to set up the business plan, the lack of suitable experts qualified in financing and the lots of initial, uncertainty factors. In the case of smaller organisations, such factor is the smaller quantities produced, where the potential fluctuations cannot be “straightened out”. Starting the activity is mostly characterised by introducing the brand, the shop or the service into the market; thus, the volume of the sales is very hard to estimate. Naturally, there are several conditions that can modify the revenue; hence, sometimes not even the most realistic scenario might be carried out. The income may be influenced by the activity of the competitors, the changing of the environment or even problems within the cooperative. However, no business plan is cast in stone, while the numbers can be revised in the form of a modified business plan.

The unprofitability of more than one half of the cooperatives is the consequence of the activity of their competitors. While the competitors of the trade cooperatives can be found in the settlement, the ones with processing activity can only be found in the nearby towns. Apart from the fact that the competitors are larger, have more liquid assets and have a longer history of operation, they are also in possession of well-established suppliers and trade routes; they are hwnxw more cost-effective. The cooperative managements are inclined to acquire and appropriate the business attitude putting productivity and effectiveness more into focus and paying more attention to planning and development. A profound knowledge of the cooperative products, services and their market is thus needed while a strategy must be created. In addition, the knowledge of the basic business/production processes (manufacturing, logistics, sales etc.) should be combined with monitoring the challenges and opportunities. The reactive meeting of market demands should thus be surpassed and proactive attitude is a necessity.

Taking the difficulties into account naturally involves pointing out that the activity of social cooperatives is *less innovative*, even if it has a gap-filling function. Innovation in a classical sense, i.e. the continued and intensive development of tools and technologies, is not the natural requisite of cooperatives. However, innovative attitude characterises those activities that exceed the traditional functions of the cooperatives: processing, trade, social services improving the living conditions of the members of the economic or local community, or in the multiplicity of the business activity. In addition,

innovation can also be found in the business attitude only possessed by a couple of organisations and in the flexible satisfaction of changing market demands, which is at present confined to a trend-following market strategy at most.

The evaluation of the operational problems found that in the field of HR faces the greatest challenge in raising the salaries and, in the case of supplier/consumer relations, other hardships include the development and introduction of a new product as well as the financing and the human resources factor of the marketing activity, i.e. locating the new customers, offering discounts and managing sales. All these factors determine the drawbacks of liquidity, then exacerbated by the lack of the opportunity to raise capital and borrow money. Creditworthiness is dependent on coverage, which presupposes the possession of a collateral, marketable estate or shop. However, most of the cooperatives do not have real estates. Thus, the problems are primarily rooted in the difficulties of further extending the market opportunities, while the lack of available capital partly results from the lack of these market opportunities and from insufficient creditworthiness.

More than four-fifths of the cooperatives do not have established connections with the small factories, they do not collaborate. However, nearly half of these cooperatives are planning on *cooperation* some time later. Still, in the sale of processed, mostly food industry products, the establishment of a long-term cooperation would be a step forward, as well as in the case of hired labour force or mutual marketing of the products. Even a permanent, reliable outworker activity built on simpler, unskilled work would provide extra resources. The cooperation with other social cooperatives is similarly unfavourable. They basically lack information about other cooperative activities and cooperation opportunities. Only cooperatives that undertake processing and trading larger volumes have established and outstanding relations with smallholder farmers, suppliers and wholesale retailers. Cooperation with local government ranges from the absolute absence of connection to excellent relations; in the latter case, the government furthers the activity of the cooperative in every possible way. This pattern is mostly characteristic of those cases in which the mutual interests are directly manifested in a local government membership or the mayor taking the manager position of the cooperative.

Another factor is worth mentioning which primarily afflicts the everyday activity of agricultural cooperatives: changing weather conditions. The

greatest challenge of producing agricultural raw materials is their increasing vulnerability to extreme weather and climate conditions, which can hinder development and competitiveness. Plant production in particular is subject to pests, weather and environmental conditions; the fluctuation and uncertainty of produce is thus substantial, which has an effect on the planning issues mentioned above.

The cooperatives would naturally prefer to increase self-sustainability, especially in offering unique marketable activities and services, maintaining the quality of the products and keeping the customers. Further development and attracting more customers requires aiming at additional, potential county or national markets, or signing contracts that secure permanent, reliable purchasers.

Besides help coming from the local government, TÁMOP and LEADER-grants have funded development (e.g. capital increase) to date. However, the cooperatives expect more support, other than financial, from both decentralised sources and the state government. While they expect the increase of cooperation as a result of the former subsidy, the latter hopes to extend the processing capacities, tool acquisition, establishing financial reserves for the purpose of paying wages and contributions by offering grant and credit opportunities. The attainment of their goals would be furthered most by a favourable modification of the legislative environment (the cooperatives should be allowed to be public employers to save labour costs) and offering advising services including systematic dissemination of information on available grants, market organisation, logistics, project-generation i.e. on development and financing opportunities.

To encourage favourable change in the market conditions, the creation of marketing strategy and its development, market survey and relational capital forming are needed. Less than one-third of the cooperatives had a homepage at the time of investigation, but the rest are planning to make one. Part of a more effective marketing strategy could be the setting up of cooperative homepages, the starting of online sales and the introduction of mobile outlets although it is very expensive and requires vehicles. However, they alleviate insulated market position, enlarge the group of customers and make the products more widely known. In addition, there is a further need to find the necessary experts for the afore-mentioned tasks and, for the time being, keep a constant level of quality, develop and extend the range of products/services and processing capacities primarily through grant subsidies.

Naturally the local self-organised activity is not enough for the successful development of local economy. To achieve this goal, the state, local government and business sectors need to be synchronically supported, the black industry should be curbed, smallholder farmers ought to be subsidised, and legal, financial (credit and support), advisory, professional service and training background should be provided. It is pivotal predominantly because the development of the competitiveness of the social cooperatives facilitates an economic growth through the extension of products and services that create an increased amount of added value. In the absence of other possibilities especially in the settlements of the most disadvantaged regions, the work-experienced individuals leaving public work can only secure their living in the new type of social cooperatives. A new subsidy grant has been available since the end of 2014 due to the new “Sui Generis” programme furthering the establishment of member labour status that aims at self-care and self-support. This grant can be used for the improvement of professional, financial and administrative capacities, while it can also help provide background services, maintain, modernise and upgrade technology and acquire production tools. The social cooperatives founded on the value-creating sub-regional “Start” work model programme can be preferred in these subsidy grant application processes.

5. Conclusions

The new type social cooperatives were predominantly established in the disadvantaged regions in the last couple of years. The most significant differences in the spatial structure can be primarily observed in the agricultural activities most influenced by natural factors. In the mainly, moderately hot and drier climate of Nyírség, the group of settlements enclosed by Western Nyírség and Hajdúhát is exceedingly vulnerable to weather conditions.

The most important goals outlined at the launching of the cooperatives have not been evenly accomplished so far. They have been incapable of considerably developing the local industry, improving self-support, living up to the expectations of the transitory role, i.e. reintegrating people into the labour-market, providing sustainability and continuous development, or encouraging entrepreneurial attitude. On the other hand, the cooperatives have almost completely fulfilled their social goals and achieved permanent

local employment. In other words, each of the public workers lives in disadvantaged regions, while older individuals, people with low education skills, women and Roma people were those predominantly provided with income raising opportunities. Thus, in the affected settlements, principally the smaller ones with less than 1,000 inhabitants, most of the disadvantaged job-seekers can improve their living conditions locally. However, the cooperatives with activities requiring more labour can even influence the labour market conditions of more settlements in the region. For the time being, the aim to turn individuals into cooperative members has already been fulfilled to a smaller extent, but self-employment has not practically been achieved. This failure is due to many factors, naturally including the lack of market opportunities, the risk-avoiding attitude of the employees, the shortness of time since the establishment of the cooperatives, or their main activity profile which often does not make it possible for the workers to become independent entrepreneurs.

In the evaluation of the role the cooperatives play in settlement development, it is worth considering that beyond employment and the improvement of living conditions to alleviate the pressure on the local governments enabling them to invest the thus released resources in developments, the operation of the cooperatives can indirectly become a part of settlement-marketing and can also improve the general assessment of the settlement. The good example obviously attracts and encourages the establishment of other businesses; thus, the local government can gain more income through tax revenues. In addition, the development of the local economy can have an indirect community-forming role, which results in the strengthening of the local identity and thus enhances the population-retaining ability of the settlement.

From a marketing and sales perspective, those cooperatives are disadvantaged which predominantly specialise in the fulfilment of the local/consumer demands, as these purchaser groups are the least affluent. This is frequently combined with a smaller, district catchment area; thus, the opportunity for sales is even more limited. The cooperatives are more satisfied with the quality and spatial distribution of the demand if the product or service sales target the market sector or the catchment area above the local level, i.e. a geographically more extended market. The revenues gained from the market activity do not cover the expenses in most of the cases, so the missing sum must be compensated for by grants and other subsidies. Not

even the organisations that operate in more favourable market environments could be self-sufficient without tendering resources.

However, there is a considerable difference in profitability between productive and commercial activities, the latter being in a more favourable position. Insufficient market results can also be attributed to the activity of the competitors; the cooperatives specialising in food trade have competitors even on the local level, while those which have processing capacities operate in the nearby bigger settlements and towns. There is much to be learnt from the more experienced, cost-efficient and better capitalised factories; the cooperatives need to go beyond reactively meeting market demands and they will have to acquire a proactive attitude. In addition, innovation in the classical sense, i.e. the continuous and intensive development including assets and technologies is also not applicable to cooperatives. The problems are primarily rooted in the lack of capital, which is due to the adversities hindering the further extension of the market opportunities and the absence of creditworthiness.

Moreover, the majority of the cooperatives have not established cooperation with the smaller factories, although this would help the enhanced utilisation of the market opportunities. Further development and the extension of the potential buyers can only be attained if new, preferably county-level or national markets are targeted or purchaser contracts signed, which would then secure continuous demand. Thus, a well-established marketing strategy will also be required to promote a favourable change in this field.

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Yuliana Yarkova, Emil Mutafov

Rural Areas in Bulgaria – Investigation on some Factors for Development

Abstract

The focus on the specific territories such as rural areas as systems is imperative in order to achieve each of the strategic goals of development at national and European level. The objective of current paper is a subject to the project “7I/14 Regional policy against depopulation of Bulgarian villages” which aims to bring to light opportunities and fields of interventions to reduce depopulation of Bulgarian villages and to formulate recommendations and measures at national and regional level. Present study limits its tasks to: systematization and classification of the factors for development of the rural areas, investigation the role of institutional actors and pointing out the factors that constraint the successful development and some pathways of resolving the bottlenecks. Since the objective data show significant disparities between developed and underdeveloped rural regions and specificity of development factors, a subjective empirical study (survey) among 144 respondents from two regions – underdeveloped and developed, has been conducted. The object of this paper is the discussion on just two of all 13 questions in the questionnaire: 1) the role of the institutions and organizations for the future development of rural areas and 2) the factors limiting development of rural areas. In formulating specific measures for activating the factors and engines of rural development two types of mechanisms need to be applied: 1) maintenance and expansion of the socio-economic functions of the areas and settlements with vitality and economic capacity; 2) social care for people

of the depopulated villages and areas which perspective is to drop out from the administrative map of the country. The results show that the development of rural areas and settlements in Bulgaria can be catalyzed using supporting measures which become agents of transition process through deployment of the institutional regime capacity and practice specific approaches towards the different type of regions, areas and settlements.

Keywords: rural areas, development, factors, institutions, measures

Introduction

Although there are different approaches to classification and analysis of the factors for rural development last decade (Hodge & Midmore 2008: 23-38; Rajovic & Bulatovic 2012: 3-20; Straka & Tuzova 1996-2005: 496-505; Yilmaz et al 2010: 239-249; Panahi 2015: 1350-1357; Hossain, Begum & Papadopoulou 2015: 34-40) all seek the roots that give impetus and energy to socio-economic transformation.

The various objectives and aspects of the identification of the factors for development, as well as the multifunctionality of local system (like rural area) define the existence of various classification criteria:

- Components of the system – under this criterion the factors correspond to the sphere/subsystem to which they belong: natural, economic, social, territorial, institutional, administrative-managerial, cultural, ecological
- Selected indicators for the level of development — when the focus is on the growth indicators, the factors are mainly quantitative and when indicators reflect the broader concept of “development” the factors are predominantly qualitative.
- Level on which they are built: 1) internal – these are the local factors that may be inherent only to the system (specific) and those that are generally valid, but with quantitative and qualitative characteristic formed locally; 2) external – they are not associated with local characteristics and production capacity
- Way of action – depending on whether the action is explicitly, the factors are: 1) explicit – when the factors are clear and are implemented explicitly, these are tangible/physical factors and some intangible, which

are expressed through specific public form/structure; 2) implicit – acting implicitly as an abstract environment, intangible, often including qualitative characteristics of environmental ingredients.

- The source of formation – 1) objective – formed out of the will of the local human factor; 2) subjective – they are related to the characteristics of the human resource and human capital in the local system
- The nature of the factors – 1) tangible, 2) intangible
- Moving capability – 1) mobile, 2) immobile

According to Lowe et al. (1998), the main features of the model for rural development are the following: a) Basic principle – the resources of an area (natural, human and cultural) are the key to its development; b) Engine of development – local initiative and entrepreneurship; c) Function of the rural areas – diversified economies; d) Main issues in rural areas development – limited capacity of the regions and individual social groups to participate in economic and development activities; e) Focus in the development of rural areas – building capacity (skills, institutions and infrastructure) and overcoming social exclusion.

According to Ray (1997), the characteristics of the development of the villages should be focused in three directions: a) at first place – the development is located in territorial and not in sectoral framework; b) at second place – the economic and other activities are orientated in order to achieve maximum retention of benefits within the territory, through the valorisation and exploitation of local resources (physical and human); c) at third place – the development is contextualized by focusing on the needs, possibilities and prospects of local people, which means that the area should acquire the ability to take some responsibility for the formation of its own socio-economic development.

Among the theories on rural development is also the concept of integration of industry in the development of rural areas (Marshall 1890; Fanfani 1994). These authors offer a more advanced understanding of the relationship between local and external factors of development. The authors, through the examples of economically successful rural areas, analyze the success of these production areas with endogenous development. Rural industrialized areas are considered within a more flexible specialization and growing integration between the production, processing and marketing of food products. The historically established socio-economic networks are discussed as a key factor for success.

Of course, some areas are more favourable places for the development of “networks” and thereby derive greater benefit from the endogenous development. According to Lowe et al (1995)

Chromy et al (2011, quoted in Straka & Tuzova 2016) consider as the key factors size of the municipalities and its position within the region. Also considered are: tradition of local community, quality of regional milieu and adaptability of key rural actors (e.g. government representatives or interest groups).

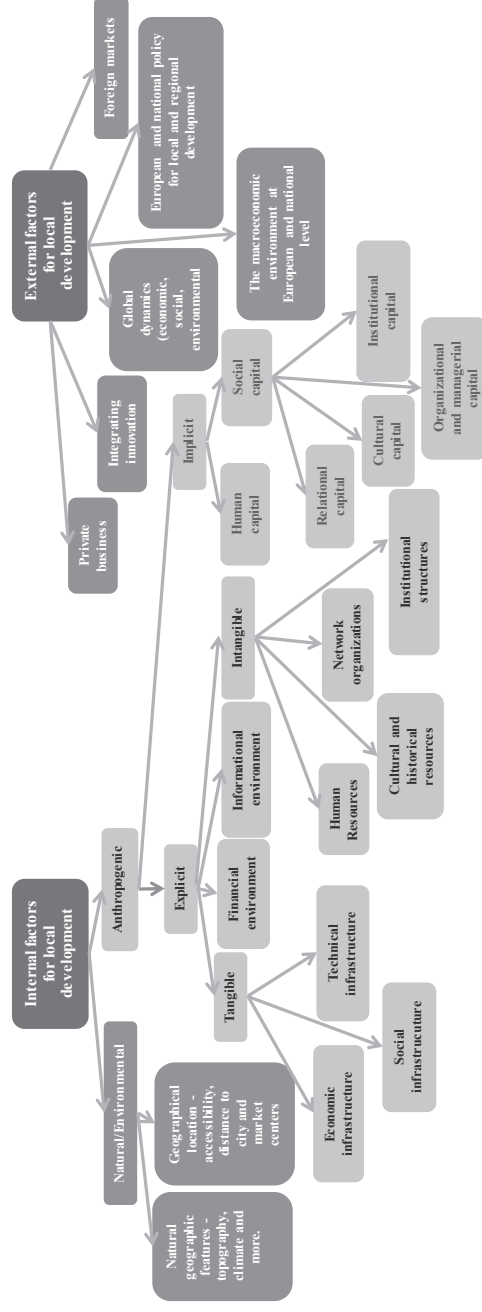
The goal of current paper is a subject to a project “7I/14 Regional policy against depopulation of Bulgarian villages” which aims to bring to light opportunities and fields of interventions to reduce depopulation of Bulgarian villages and to formulate recommendations and measures at national and regional level. Present study limits its tasks to: systematization and classification of the factors for development of the rural areas, investigation the role of institutional actors and pointing out the factors that constraint the successful development and pathways of resolving the bottlenecks.

Based on the thesis that the institutions are fundamental cause of long-run growth (Acemoglu, Johnson, & Robinson 2005) and the matter that the factors affect rural development through established institutions we have conducted an investigation on the significance of the main institutions having role for the development of the rural areas in Bulgaria and we have also identified the limiting factors for development.

Classification of factors for rural development

We consider of primary importance to contextualization the identification and the analysis of factors in the focus of searching alternatives for endogenous development, based on local factors, resources and assets. That's why on Scheme I we present the internal and external factors for rural development.

Scheme 1. Internal and external factors for rural development



Source: Authors interpretation

Internal factors

Each local territorial system is represented by two groups of internal resources – natural/environmental and anthropogenic. When they get involved in the development process we can identify them as factors, assets which status (quantitative and qualitative) forms the capacity of the system to evolve and transform.

1. Natural factors. Of primary importance for the local development is to identify the specific natural resources of the local system that would provide competitive advantages.

1.1 Natural-geographical conditions – topography, climate, water resources, flora and fauna

1.2. Geographical location – it must be assessed from the point of view of accessibility, distance to city and market centers, spatial relationship with developed regions, localization characteristic compared to neighboring areas.

2. Anthropogenic/civilizational factors, internal for particular region are reviewed in the context of their palpability and abstractness.

2.1. Explicit factors are presented in tangible and intangible form:

2.1.1. The tangible factors include the infrastructures built – economic, technical, social.

Economic infrastructure is characterized by the acting economic agents, their structure in size and industry specialization. The technical infrastructure is presented through the transport arteries, water and sanitation, treatment plants, communication resources. Social infrastructure is regarded as living environment consisting of the established educational, health and social structures at the local level.

2.1.2. The intangible explicit factors include human resources, institutional structures (public, private, organizations and associations), cultural and historical resources, spatial and settlement organization, positioning (location in the hierarchical structure of the spatial model of the country) and the recognizability of the region (presentation, advertising), network organizations, forms of social life

2.1.3. The financial environment is presented through the available markets and financial institutions (banks, insurance and investment companies), public and private financial flows.

2.1.4. Information environment – it is formed as a system of informational funds, ICT and their implementation in the economic and daily life of the local community

2.2. Implicit factors. Representatives of this group of factors are pillars for increase of the welfare of society and its members – the increase of knowledge and organization. Here the specific items are defined as “capital” because of their potential of self-growing and to generate qualitative and quantitative progress. Of course, the aim here is to present them in the light of the local rural system without an overview of the basic definitions and concepts of human and social capital, and other elements of the society capital.

2.2.1. Human capital – this is the ability within the local territorial unit to enhance the value of human labor (physical, intellectual, managerial). On micro level we can consider this as accumulation of knowledge, experience, skills acquired and a qualification modified as a result of them, combined with health status, motivation, talent, adaptability, innovativeness of the people. On macro level – the public system – this is the population as quantity and quality, its creativity, generational relationships, professional groups, etc.

2.2.2. Social capital. It is about the characteristics of the local communities, networks of social contacts and interactions. The social capital is manifested in various forms

- Relational capital or capital of relations in the community system

As a result of the process of knowledge and building of organizational system through formed non-profit interdependencies are created additional locational savings for economic operators in the region.

- Cultural capital – a model of certain thinking, feeling or action of the people of the community, which includes a culture of trust and reciprocity, the effect on civil, political and economic life of the communities.

Socio-cultural subsystem reinforces the economic aspects of rural development with its ability to support increasing returns and self-increasing mechanisms of development.

- Institutional capital – it is presented by the normative acts of the current legal and administrative system as well as the media influence. The modern concepts for rural development are characterized by the active presence of the institutional approach in consideration with the fact that behind the development at regional/local level stands the potential of institutional assets.

- Organizational and managerial capital – manifested through administrative effective subordination and coordination, adherence to principles and manageability, ability to unite local participants around common goals.

All these factors can strengthen and enrich the nature of concentrated territorial organization, which can generate networks of economic and social relationships that support more efficient and cheaper transactions, create advantages in economic and physical closeness between economic operators, to stimulate local processes of knowledge acquisition and learning. Thus the rural development is directly dependent on the effectiveness of the concentrated territorial organization of production and the overall development and not only on the availability of resources or on their more efficient spatial distribution.

We can outline the main endogenous elements of rural development as follows: local resources for production and entrepreneurial activity, the capacity of local economic and social actors to take decisions through which they can lead the development process, to support it in the stages of transformation and innovation, and to enrich it with knowledge and information. A prerequisite for the increasing topicality of the local perspective of rural development is the capacity of participants in the certain municipalities, towns and villages (companies, citizens, entities developing policies, etc.) to take the problems into their own hands, to unite, to adapt and successfully cope with external pressures. Any support for increasing the capacity of a single element, participant or a relationship is futile, if the forces and incentives that drive them all as a unified whole in the local system, are not bound.

External factors

These are the factors that have nothing to do with local characteristics and production capacity, but they can catalyze new economic processes, to reflect on the development of the rural areas as a whole. Such determinants may be presence of a company, penetration of information, knowledge and innovation in the area which were created elsewhere, build new infrastructure with a decision of external bodies. As external factors for rural development work also: global dynamics (economic, social, natural); the macroeconomic environment at European and national level; external markets; European and

national policy for rural development. Moreover, the approach of “bottom-up” development does not exclude the intervention of the state related to social life, for example in solving social problems through measures that are not bound by the existence of some local peculiarities.

According to the OECD, there are four main prerequisites for success in the development of a rural area – flexibility, competence, efficiency and synergy (OECD 1996).

Fanfani (1994) identifies over sixty areas in Italy, which had success in endogenous development and he argues that the success of the agro-industrial areas arises from the relationship between the agricultural specialization and strong local craft industries.

Many rural areas have a chance to become successful as they “pave the way” without (or with very little) foreign assistance, but as Cécora (1999) states only in rural areas with already existing agrarian or processing networks the innovations, implemented through the “bottom-up” approach have proven successful, without significant state interference. So the formation of a cluster of small enterprises is closely connected with the socio-economic context with a particular social structure, labour market and techno-industrial interactions between local actors.

A case study on some factors affecting development of rural areas in Bulgaria

In Bulgaria the doctrine for the development of rural areas can become an effective tool for the revitalization of rural type of territories only through active attention and care at particular areas and their problems, by seeking measures to tackle critical demographic imbalances and the process of abandonment and isolation of many villages. The individual settlements are the “field” of centripetal and centrifugal forces, within the framework of which they selectively attract or reject actors and means of production.

The destructive change in economic and social life in the Bulgarian rural settlements during the last two decades – withering away the economic activity, dipole type of agriculture, deterioration in the quality of life – created dominant centrifugal forces and formed strong outgoing migration flows.

These specific territorial units don't remain insulated from global processes and challenges (climate change, the exploitation of resources,

the ageing population, migration, etc.), which creates obstacles for their sustainable and balanced development, but it is our task to turn barriers into opportunities for preservation and revitalization of villages and rural areas.

The proliferation of the so-called participation approaches in the development of rural areas (mainly by LIDER approach) doesn't give the expected result for the Bulgarian conditions to ensure effective utilization of the rural resources and potential for progress. On the contrary, to a large extent they either provide field for local supremacy of influential local factors on decision-making or they are undermined by local apathy.

The development of specific territories such as rural areas suggests a permanent enlargement and enrichment of socio-economic analyses focused on the factors, conditions and the engines which maintain the vitality and capacity for the development of these places and regions. Rural areas in Bulgaria cover the territory of the rural municipalities² that occupy over 82% of the surface area of the country and 39% of the population.

The objective data and information show significant disparities between underdeveloped and developed rural regions and specificity of development factors. So the investigation has been conducted in representative regions of the two groups, respectively Vidin region and Stara Zagora region (see table below).

Table 1. Comparison between Vidin region and Stara Zagora region, 2015

Indicators	2015		Index Stara Zagora/ Vidin
	Vidin region	Stara Zagora region	
Population (number)	91 235	323 685	3.5
Population rate of natural increase (per 1 000 inhabitants) - ‰	-16.7	-6.9	-0.41
Average annual salaries of employees under labour contract (euro)	3585	5454	1.5
Employment rate – 15-64 years old (%)	58.8	60.3	1.03
Unemployment rate (%)	18.8	9.7	0.51
Percentage of the population 25 to 64 years old with tertiary education (%)	21.5	22.6	1.05
Hospital establishments (number)	2	15	7.5

Indicators	2015		Index Stara Zagora/ Vidin
	Vidin region	Stara Zagora region	
Cumulative foreign direct investment in non-financial enterprises as of 31.12 (thousand euro)	39 800	523 247	13.1
Production value (thousand euro)	264 269	3 593 239	13.5
Length of motorway (km)	-	92	-
Length of category I roads (km)	74	167	2.3
Length of railway lines (km)	108	262	2.4
Personnel engaged in research and development (R&D) (number)	48	1 286	26.8
Percentage of households with Internet access (%)	48.0	61.4	1.3

Source: NSI, regional statistics <http://www.nsi.bg/node/797>

Stara Zagora region is at 5th place in Bulgaria and Vidin region occupies the last 28th position according to the value of “GDP per capita” indicator. Most of indicators are well below in Vidin region demonstrating significantly adverse demographic processes, poor economic, social and infrastructural environment, less attractiveness for living and business activities.

In the context of comparison of the two regions – they have a similar structure of associated municipalities: Vidin region – 11 municipalities (90% rural areas), Stara Zagora region – 11 municipalities (82% rural areas).

The empirical research is in the form of a sampled standardized inquiry by questionnaire and is conducted during the period May-August 2014 among 144 respondents. The whole questionnaire consists of 13 questions (12 closed and 1 open). The subject of analysis in the current study are two of them 1) the role of the institutions and organizations for the future development of rural areas; 2) the factors limiting development of rural areas. The respondents from both regions were asked about the measures that they would suggest against depopulation of Bulgarian villages.

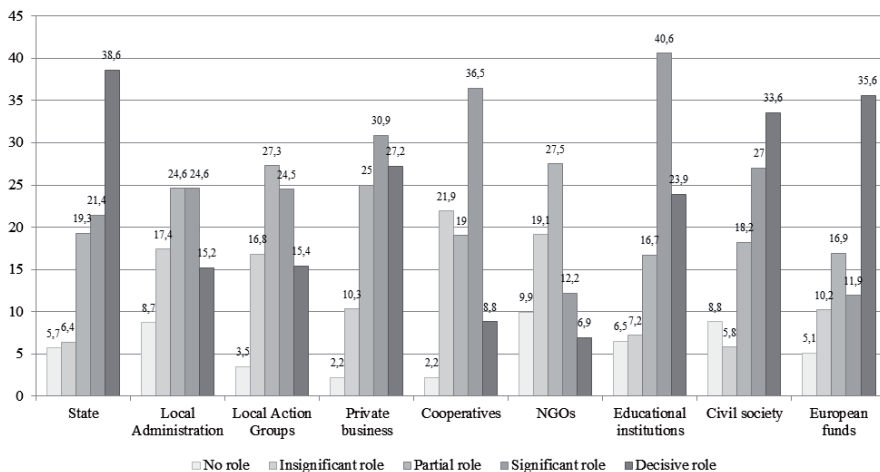
In both questions the respondents were asked to rate the possible answers at five-point Likert scale or choose an answer “I can’t decide”. Statistical software IBM SPSS 9.9 was used for the data processing. Frequency distributions, cross tabulation, χ^2 -method and other methods of statistical analysis are applied in the data processing

In Figure 1 are presented the results on the issue of the importance of the main institutions and organizations, which are related to the development of the rural areas.

The number of those who choose the answer “I can’t decide” is from 6 to 32 in the different factors and the average number of respondents evaluated the role of each institution/organisation is 125. Most commonly the respondents have indicated they may not consider the role of the European funds and non-governmental organizations, which is associated with insufficient awareness among the population regarding the mechanisms by which they impact the local development.

According to the respondents the state holds the most decisive role in the rural development, followed by the European funds and the voice of the civil society on topical issues concerning the settlements themselves. As “significant” is defined the role of the educational institutions and the private sector. The highest percentage of “insignificant role” and “no role” is given to cooperatives and non-governmental organizations.

Figure 1. Significance of institutions for the future development of the rural areas in Bulgaria, according to respondents in Stara Zagora region and the Vidin region (%)



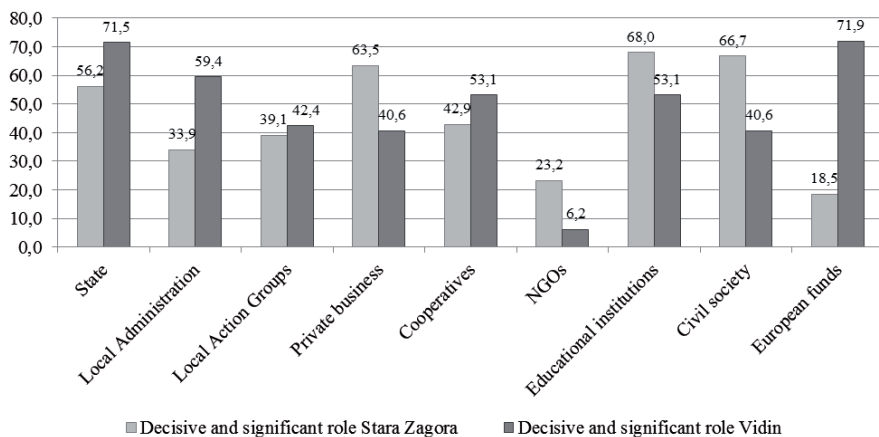
Source: Survey in Stara Zagora and Vidin regions, 2014

In Figure 2 are presented the results of the frequency distribution of answers “significant role” and “decisive role” concerning the relevant institutions and organizations in both regions. The data shows that in Vidin region the greatest importance for the development of rural areas is given to the state and European funds (over 71%). The latter result is understandable for a poor region with low socio-economic development that relies on state policy, targeted grants and EU funds, which the state uses to promote development. In a survey conducted by Toneva (2015) in industrialized rural communities respondents also define the state as a leading factor in the revival of Bulgarian villages and rural areas. Local administration (59.4%) is also a leading institution that is believed to have the potential to ensure prosperity. Respondents from Stara Zagora region point as most significant for the future development of rural areas educational institutions (68%), civil society (66.7%), private business (32.7%) and the state (35.2%). On one hand the position given to the civil society is a result of the fact that in the developed communities it has a strong influence, and on the other it is because of the specific age structure of respondents of Stara Zagora region (73% are under the age of 35 – young people who are active and have a civic positions). It is no surprise that respondents from the developed region also put stress on private business and education. Furthermore, these are both factors for development and their level is among the key indicators for the development of a region. It should be noted that in general the respondents from Vidin region have a more negative attitude and distrust toward the institutions and organizations. The share of the respondents who choose answer “no role” is higher for all assessed factors in Vidin region in comparison to Stara Zagora region.

The metrification of the relationship between the type of region and institutions/organizations with decisive and significant role (via Cramer coefficient)³ indicates that this connection is weak to moderate (Cramer's $V_s = 0.197-0.405$). Only as regards the “European funds” there is a significant relationship (Cramer's $V_s = 0.649$) according to the type of region.

The second question, subject of this study is related to the negative impact of some factors restricting the development of rural areas.

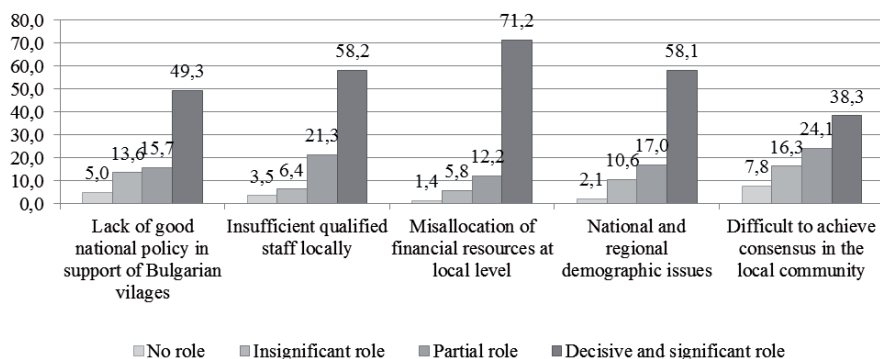
Figure 2. Institutions and organizations with “decisive and significant role” in the development of rural areas, Stara Zagora region and Vidin region (%)



Source: Survey in Stara Zagora and Vidin regions, 2014

In Figure 3 are presented the aggregated results concerning the opinion of the respondents in terms of existing adverse factors. It is apparent that according to respondents the most negative role, restricting rural development has “Misallocation of financial resources at local level”. The latter reflects the anxiety of focusing the municipal resources mainly for municipal centers. The second largest deficits are “Insufficient qualified staff locally” and “National and regional demographic issues”. According to respondents the factor that has the least negative impact on the development of rural areas is “Difficult to achieve consensus in the local community”. On one hand, this may indicate that this problem is almost non-existent but it is rather because the respondents realize that in many regions it is impossible to speak of organized community. Furthermore the expectations are that if other barriers are overcome a consensus among the actors will be more easily achieved.

Figure 3. The role of some factors limiting the development of rural areas – Stara Zagora region and Vidin region,%



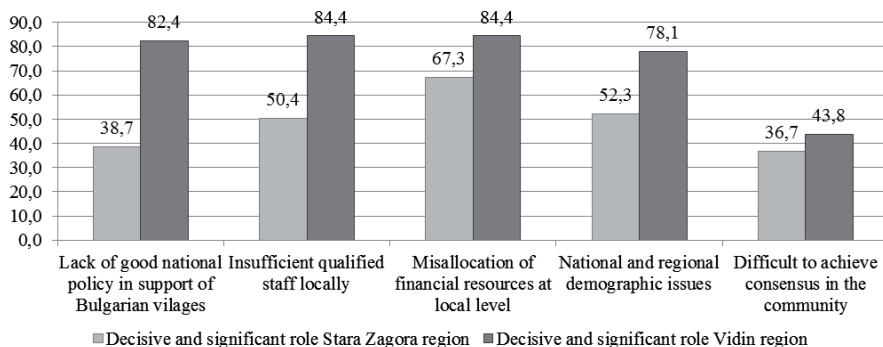
Source: Survey in Stara Zagora and Vidin regions, 2014

On Figure 4 are showed the processed answers for the two regions separately. The data shows that respondents in the less-developed region are highly apprehensive of the negative factors – larger share of respondents from Vidin region asses all the factors compared to Stara Zagora region. This corresponds to the smallest share of respondents with “I can’t decide” – in Vidin region they are only 1-2 for each of the factors while in the Stara Zagora region they are between 13 and 22.

Another interesting result is that almost all of the factors are referred to as equally strong in limiting the development of rural areas, with the exception of “Difficult to achieve consensus in the local community”. However, in Vidin region the factors mostly considered as “decisive” and with “significant role” are “Misallocation of financial resources at local level” and “Insufficient qualified staff locally”.

The measurement of relation strength between the type of region and factors with the strongest restrictive role for rural development shows that interdependence is of a medium importance (Cramer’s $V = 0.206-0.499$). The highest value of dependence is in the factor “Lack of good national policy in support of Bulgarian vilages”.

Figure 4. Some factors with “decisive” and “significant role”, limiting the development of Stara Zagora region and Vidin region,%



Source: Survey in Stara Zagora and Vidin regions, 2014

The measures proposed by the respondents are related both to the role of the central government as well as to the activity of local administration:

- a) helping farmers in starting up a business through the participation of the “guarantee fund” and a grace period on payment of interest and taxes;
- b) interest-free financing of young families to start a new business;
- c) improvement of awareness and access of population at local level to European funds at light administrative regime;
- d) resuming the activity of schools in Bulgarian vilages;
- e) easier access to quality health services;
- f) state support for the development of rural tourism;
- g) providing programs for more jobs in the countryside;
- h) elaboration of incentives for local small and medium business;
- i) reducing bureaucracy;
- j) reduction of local taxes and fees for the rural population;
- k) activity for inclusion in more public projects about European programs for development;
- l) remote administrative services for the population through the Internet, e-documents.

Conclusion

Insufficient state policy and practice regarding Bulgarian vilages and rural areas is the most painful for the population of the investigated underdeveloped region. That's why expectations for future development are associated with the correction of state approach and introduction of proper measures to solve problems such as demographic crisis, under-qualified and under-

trained staff, jobs. On one side, that means fostering mechanisms for creating quality and sustainable public goods – legal system, educational, health care, social services, protection, technical infrastructure. On other side, rethinking and better coordination of the two approaches in policies and practices “top-down” and “bottom-up” is on the agenda. The project of *Strategy for decentralization 2016-2025* needs to be improved, accepted and put in action even more so there are strong expectations from the developed region for better allocation of financial resources at local level. The development lies not only on increasing of the goods consumed by society, but also giving the opportunity for communities to control further their relationships. The role of each of the local participants here is relevant, in terms of capacity (innovational, production, managing, organizational), competitiveness, relations with the local system and the external environment. Any support for increasing the capacity of a single element, participant or a relationship is futile, if the forces and incentives drive them all as a unified whole in the local system

In order to overcome the asymmetry in the relationship between the participants in rural development we need to establish and maintain a new resource of networking all stakeholders (formal and informal). The promotion for establishment of *Operational groups* for solving the specific regional/local problems under *Rural Development Program 2014-2020* is a crucial instrument for integrating the actors and performing interdisciplinary approach.

In formulating specific measures for activating the factors and engines of rural development two types of mechanisms need to be applied: 1) maintenance and expansion of the socio-economic functions of the areas and settlements with vitality and economic capacity; 2) social care for people of the depopulated villages and regions which perspective is to drop out from the administrative map of the country.

The **first group** mechanisms includes measures to limit the negative factors as well as using and expanding possibilities both in developed and lagging rural settlements and areas with potentiality of revitalization. Generally these are rural areas adjacent to urban centers from all hierarchical levels, since the development is inextricably connected to the evolution of the system of relationships with the major urban centers. Some of them are “white spots” on the map of *Rural Development Program 2014-2020* and *Operational Program “Regions in Growth” 2014-2020* with a very limited opportunities for support. So either the national definition for “rural areas”

needs to be improved or scope of financing under *Integrated plans for urban regeneration and development* is to be broadened. The latter is essential because of observed process of deconcentration of the population towards suburban rural areas.

In parallel these areas have a great potential as regards utilization of the collective resources, increasing integration between the processes of production, processing and marketing of food products, in conjunction with the common interest of producers-consumers towards “short food supply chain”. So national and local governments are responsible for speedily resurgence of local services (health, social, educational, information and communication, etc.) and also provision of administrative and territorial environment for opening “farmers market”. Another aspect of governmental (national and local) support is the restraint of the administrative restriction on SMEs and overcoming any discriminatory element in the financial assistance of business. Proactive measures regarding the bureaucracy reduction is needed, including through accelerating the introduction process of e-government at national and regional/local level.

Second group mechanisms need deal with rural areas and settlements with strongly shrank and ageing population, compromised infrastructure and future without perspective. On the first place measures must be regarded for taking care of lonely, social isolated, diseased people and those who can't care about themselves. That implies some jobs in the social services sector to be opened and opportunities for training and volunteer programs to be created. A well-known element of future development is provision of security and safety life under challenges of climate and other type of contemporary risks. Measures of maintenance of infrastructure of cultural and historical heritage is mandatory even in depopulated settlements. Clearly defined legal rules for the abandoned buildings is an opportunity for solving housing problem of some social groups as well as developing innovative forms of social inclusion and integration.

Thus the development texture appears as effectively functioning modern legal and normative base, institutional structures and networks targeted at growth and implementation of mechanisms based on innovation and knowledge transfer, creation of atmosphere of interaction, reciprocity and trust between the actors in rural development. Catalyze development of rural areas and settlements in Bulgaria can be achieve using supporting measures which are agents of transition process through deployment of the institutional

regime capacity and practice specific approaches towards the different type of regions, areas and settlements.

Notes

1. The results presented in the study are part of a broader research in implementation of project 7I/14 Regional policy against depopulation of Bulgarian village in 2014 and are reported at national conference “Alternatives to the economic development in the 21st century: theories, policies, solutions”, 30 September – 2 October 2015, “Golden Sands” resort, Varna, Bulgaria;
2. National definition, National Rural Development Programme 2014-2020, Bulgaria;
3. SPSS: SPSS Commands and Interpreting Statistics

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Jerzy Bański

The Future of Rural Poland: the Main Trends and Possible Scenarios.

Abstract

The objective of the report is to attempt the identification of the most significant factors that will shape Polish countryside until the year 2050 and to outline the feasible scenarios of changes in rural areas. The study is based primarily on qualitative analysis and on the knowledge of experts specialising in rural subject matter in its different thematic domains.

Six groups of factors were distinguished (economic, technological, legal and administrative, political, socio-demographic, natural) and for each of these groups the most important conditions were analysed. The image of the Polish countryside in the perspective of the decades to come will most probably not undergo radical shifts. However, we can make the proposition that this countryside will be more diversified, more socially and economically active, and more attractive as the place of residence and of work.

Key words: Poland, countryside, scenario, rural development, rural future, trends

1. Introduction

Things that will happen in a couple of years, or in some decades from now, remain unknown to us. Based on our experience and knowledge we tend to

undertake more-or-less successful attempts at describing future events, since they are of paramount importance for planning of our actions. As rightly noted by I. Wilson (2006: 45) “... *all knowledge is about the past; and all our decisions are about the future*”. Uncertainty as to the future gives rise to our curiosity, stimulating deep insight and motivating imagination. Forecasting the future is an interesting but also very difficult scientific endeavour, in which one should account for a broad spectrum of variable factors shaping the future. We must always be prepared for the new and unpredicted phenomena, which will change the image of events that we have assumed.

The domain of the future developments is a popular subject of rural studies. Studies of this kind concentrate most often on the analysis of the variability of the future socio-economic phenomena and on the assessment of the potential development directions and trends in the countryside, in different sectors of economy and on different spatial scales (see e.g. Hogan & Young 2013; Shucksmith 2013; Paul 2013, Elands & Praestholm 2008).

Social themes dominate in studies of this kind and investigations first concern the directions of changes in the social and demographic structures, as well as challenges for and expectations from the rural inhabitants with respect to the coming years (Goux-Baudiment et al. 2011; Marsden 1999; Kiura 2010; Kupiszewski & Bijak 2007; Scott et al. 2009). The future of the countryside is also the subject of numerous projects and expert analyses, which are expected to serve directly some practical purpose (Rural Futures... 2005; Rural Finland 2015... 2006; Our rural future... 2011; Our countryside... 2000; Hedström & Littke 2011; U.S. Congress 1991). Such reports identify the most important conditions of development of rural areas, along with trends that can be expected to prevail in the coming years.

The scientific identification of the social and economic phenomena is due to take place in the coming years, while the assessment of their dynamics and directions constitute the foundation for programming and taking strategic decisions in various domains of social and economic life. One of the potential elements of the research procedure consists in the design of events, with respect to which we can propose several alternative realisation options (“scenarios”), which are more-or-less probable (Gierszewska & Romanowska 2009).

Scenarios are hypothetical sequences of events, constructed for the purpose of turning attention towards definite processes and key decisions (Kahn & Wiener 1967). Scenarios are not equivalent to the images of the

future; by no means do they constitute a forecast, but are rather a form of design for the future (Rotmans et al. 2000). A somewhat different approach is represented by the authors of climatic scenarios, who emphasise that a scenario is an internally consistent description of the potential states of the future reality (IPCC 1994).

Scenarios may be constructed according to a wide variety of principles and there are four broadly conceived approaches to their construction (Kuhlman et al. 2006). The first of those consists in the extrapolation of the contemporary trends; the second in the use of expert knowledge; the third in the integrative approach to the description of the future reality; and the fourth one in the use of the composite methodology, based on the three preceding approaches. Modern theory and the methodology of scenario studies is the subject of a separate knowledge, being developed mainly by the representatives of economic sciences (van Notten et al. 2003; Gausemeir, Fink & Schlane 1998; Postma & Loeb1 2005).

During more than sixty years of history, scenario analysis was made use of by the scientists and practitioners representing highly differing professions (Ringland 1998). Until the beginning of the 1990s, the development of scenario studies was dominated by economists, engineers and planners. Yet in the domain of social sciences such studies were a rarity (Jungermann 1985). During the 1950s, military scenarios were being built in the United States, but from the 1960s, scenarios were used in the construction of policies of development of towns and regions in France, while in the subsequent decade these studies became popular in the corporate world (Dammers 2010). The most known examples of application of the scenario analyses concern large corporations, such as Royal Dutch Shell (Coates 2000), British Airways (Moyer 1996), or international organisations (World Business Council for Sustainable Development 1998; IPCC 2000; Nakićenovič et al. 2000). Nowadays, these scenarios are a popular tool in futures studies and are commonly used in large projects and research programmes, financed by the European Union (Volkery et al. 2008; Gough 1999; Scenarios 2014; Abildtrup et al. 2006).

Scenarios have also been used in the studies of rural areas. First of all, they appear as the effect of the research programmes (ESPON, SCENAR2020, Eururalis, SENSOR, PRELUDE, etc.), carried out by the international research teams. Comparative studies of the results of investigations performed in these projects made K. Jansson and I. Terluin (2009) distinguish six EU rural

futures, resulting from the intervention policies (baseline, competitiveness, cohesion) or from the disruptive events (clustered networks, big crisis).

One of the amplest reports, making use of the scenario methodology, is provided by the SCENAR 2020 studies, performed by the international team of researchers upon the commission from the European Commission Directorate-General Agriculture and Rural Development (Nowicki et al. 2006). This report identifies the trends and mechanisms that will shape the European agriculture and rural economy from the perspective of the coming year 2020. This purpose is served by three alternative scenarios: baseline, regionalisation and liberalisation. The first stage of these studies consists in the construction of the reference (baseline) scenario, which was developed from trends taken from the years 1990-2005, to be then – by analogy – forecast up until the year 2020. In the two remaining scenarios, alternative political conditioning was accounted for. In the case of the regionalisation scenario, this alternative conditioning was lack of constructive agreement at the Doha summit and increased emphasis on the support for the internal markets.

In the liberalisation scenario, the opening-up of the international markets is marked by decreasing support for the farming sector. In effect, owing to application of various indicators, these scenarios allowed for the detailed assessment of demographic processes and the dynamics of economic changes in the countryside, as well as transformations in the production system and in the farm structures.

A similar qualitative character was displayed by the scenarios elaborated in Finland upon commission from the Finnish Ministry of Agriculture and Forestry (Rural Finland... 2006). The authors of that project made use of more than ten factors which, in their opinion, will shape the future of the Finnish countryside (like, e.g., globalisation, energy prices, demography, extension of the EU, technological changes, cooperation with Russia, state of the natural environment, climate changes, etc.). An assessment of the directions and rates of changes was the basis for proposing four scenarios.

In the first of these scenarios – Healthy Rural Area – an increase was assumed of the significance of localism, harmonious cooperation and diversification of the enterprise structures in the countryside. The second scenario – Individual Subjects – assumes a global economic crisis, increase of significance of bioenergy and the services concentrated on the domestic market. In the third scenario – Economy of the Western World in Crisis – the key role is played by the globalisation processes, which will weaken the

small rural enterprise, while strengthening the centralisation trends, while this will make the socio-economic situation in the countryside worse than in the initial year 2005. Then, in the Bipolar World scenario, an increase in networking is envisaged (linkages between public administration and business as well as the service sector), along with the increase of economic uncertainty, associated with the increasing energy prices, pressure from large corporations and from other external factors.

The scenarios elaborated in the framework of the EURURALIS project (three editions) had quantitative character and were based on statistical models, making use of a rich database containing data on the economy, demography, land use and climate change (Westhoek, van der Berg & Bakkes 2006; Rienks 2008; Klijn et al. 2005). The analysis of future changes within the rural areas of Europe on the scale of regions (NUTS 2) and in the perspective of the year 2030 encompassed such processes as: depopulation and ageing, urbanisation, extension of the European Union, globalisation of production and trade, climate change, land use changes and technological progress.

The effect of work was then presented through the elaboration of four scenarios (Global Economy, Continental Markets, Global Co-operation, Regional Communities), based on two superior kinds of conditions: scale – global or regional approach, and economic policy – market orientation or interventionism. The project mentioned also enabled a deeper study of scenarios related to landscape and land use (Verburg et al. 2006; Verburg, Veldkamp & Rounsevell 2006). The potential directions of change in land use were also the subject of another study, carried out in the framework of the project ACCELERATES (Assessing Climate Change Effects on Land use and Ecosystems from Regional Analysis to The European Scale). On the basis of four socio-economic scenarios (World Markets, Regional Enterprise, Global Sustainability, Local Stewardship), the influence here was assessed of climate change on agricultural land use in three time horizons – 2020, 2050 and 2080 (Abildtrup et al. 2006).

Polish scientific literature offers little in terms of ideas on the future of countryside. Among the few reports on this subject, one can mention those by J. Wiklin (2005), L. Kolarska-Bobińska, A. Rosner and J. Wiklin (2001) and J. Bański (2013a, b) devoted to the forecasting of the social and economic processes in the countryside over the horizon of more than a dozen years on different spatial scales. The Polish countryside is inhabited by close to 40% of the total population, while the farming sector operates in more than

half the country's area, employing 12% of all the working persons. That is why the future of Polish rural areas appears to be a very important subject of discussion from the economic, social and political points of view.

The objective of the present report is hence to attempt the identification of the most important factors that will shape Polish countryside until the year 2050 and to outline the feasible scenarios of changes in rural areas. The study is based primarily on the qualitative analyses and on the knowledge of experts, specialising in rural subject matter in its different thematic domains.

2. The method

Scenarios may have explorative or anticipative character. In the first case, we will deal with formulation of a logical sequence of events leading to a feasible future, with consideration of the key tendencies in the systemic environment. In the second case, we will assume an image of the future (a vision) and the events that will influence the reality in such a manner that the assumed image will be realised. In the study, the explorative scenario is used, such that probability was assessed of appearance of definite factors along with the strength of their influence. Six groups of factors were distinguished (economic, technological, legal and administrative, political, socio-demographic, natural) and for each of these groups, the most important conditions were analysed. In the opinion of the experts, they have the most significant influence on future events in rural areas.

Four types of scenarios can be elaborated in the framework of the method applied:

- the optimistic scenario, accounting for the most advantageous development trends regarding rural areas;
- the pessimistic scenario, being the opposite of the optimistic one;
- the most probable scenario, which can also be referred to as the most realistic one; and
- the surprise scenario, which assumes random shifts in the directions of changes in rural areas (this scenario was not analysed in the study).

Fig. 1. Groups of factors influencing rural areas

In view of the expert-based methodology of the study, an essential role was played in the construction of scenarios by the knowledge and experience of the experts. In this concrete case, these experts were four

professors from three academic centres, their research interests concerning rural areas¹.

The procedure of developing the scenarios encompassed three stages, each of these stages being composed of a series of steps. The first stage consisted in identification of the most significant factors shaping the future of Polish countryside. Each of experts could propose up to four factors in each of the six groups. The assessment of the influence, exerted by the trends related to each of factors (increase, stabilisation, decrease) on future changes within the rural areas was the second and the most important stage of the investigation. The initial step in this stage consisted of the scoring assessment of the strength of influence, exerted by each of the possible trends, on the scale from “-5” (highly negative influence) to “+5” (highly advantageous influence). The second step consisted in the indication of probabilities of certain trends appearing, with the values of these probabilities for each factor necessarily summing up to 1. In the third stage the scenarios were formulated.

3. Identification of factors shaping the future of rural areas

Experts have formulated a set of diverse factors in the group of economic conditions, with the main emphasis naturally being placed on these factors, which are associated with the situation of farming. In Poland, agriculture still constitutes the leading economic function in most rural areas and so the development of these areas depends primarily upon the economic vigour of farms. Experts were also of the opinion that a vital role in the shaping of the future of rural areas will be played by the subsidies from the European Union and by the situation on the global market, with special emphasis on the role of the “emerging” economies (see Table 1).

The conditioning factors, which were listed for the technological sphere, focused on three issues. Thus, the development of the rural areas in the perspective of the coming decades will depend upon the innovativeness of the production solutions in the farming sector, the digital and the transport-

¹ Ekspert 1 – Roman Kulikowski (Institute of Geography and Spatial Organization, Polish Academy of Sciences), Ekspert 2 – Krzysztof Janc (Wrocław University), Ekspert 3 – Marcin Wójcik (Łódź University), Ekspert 4 – Jerzy Bański (Institute of Geography and Spatial Organization, Polish Academy of Sciences).

wise accessibility of the countryside, as well as the level of equipment of the households with the basic elements of the technical infrastructure. An important part of the rural areas in Poland is still characterised by the low values of indicators of technical infrastructure. Hence, it is not surprising that the experts indicated as important the factors that have reached high standards in rural areas of Western Europe quite a long time ago (see Table 2).

Table 1. Identification of economic factors and assessment of their influence on the future of rural areas

Expert	Factor	Trend	Strength of influence	Probability
Expert 1	Long-term tendency of change in the level of economy in Europe	+ +/- -	5 2 -3	0.7 0.2 0.1
	Ratio of prices of agricultural produce and other products	+ +/- -	4 4 -2	0.4 0.4 0.2
	Magnitude of exports of agricultural produce	+ +/- -	2 5 -3	0.3 0.5 0.2
	Magnitude of means for the development of ecological farming	+ +/- -	4 3 -3	0.5 0.4 0.1
Expert 2	Significance of online services	+ +/- -	4 2 -3	0.7 0.2 0.1
	Role of large Asian countries in the world economy	+ +/- -	-4 -1 4	0.6 0.2 0.2
	Dynamics of changes in conditions for economic activity	+ +/- -	-3 1 4	0.6 0.3 0.1
	Level of unemployment	+ +/- -	-5 -1 4	0.3 0.4 0.3
Expert 3	Level of entrepreneurship	+ +/- -	4 1 -4	0.2 0.5 0.3

Expert	Factor	Trend	Strength of influence	Probability
Expert 3	Liberalisation of food trade	+	3	0.2
		+/-	1	0.6
		-	-3	0.2
	Level of agricultural production	+	1	0.1
		+/-	2	0.5
		-	-3	0.4
	Magnitude of assistance means from the EU	+	2	0.3
		+/-	1	0.3
		-	-4	0.4
Expert 4	Dynamics of the economic development of the country	+	5	0.2
		+/-	2	0.5
		-	-5	0.3
	Competitiveness of the emerging economies	+	-3	0.6
		+/-	1	0.3
		-	3	0.1
	Significance of the food sector in the GDP	+	3	0.1
		+/-	1	0.3
		-	-3	0.6
	Degree of multi-functionality of the countryside	+	4	0.5
		+/-	-1	0.4
		-	-3	0.1

Source: own elaboration

Table 2. Identification of technical factors and assessment of their influence on the future of rural areas

Expert	Factor	Trend	Strength of influence	Probability
Expert 1	Equipment of rural areas with technical and road infrastructure	+	5	0.6
		+/-	-2	0.3
		-	-3	0.1
	Equipment level of rural dwellings	+	3	0.7
		+/-	2	0.2
		-	-3	0.1
	Transport-wise accessibility to bigger cities	+	5	0.4
		+/-	-2	0.4
		-	-3	0.2

Expert	Factor	Trend	Strength of influence	Probability
Expert 1	New technologies in farming	+ +/- -	4 -2 -3	0.5 0.3 0.2
Expert 2	Rate of technological changes	+ +/- -	-2 1 2	0.8 0.1 0.1
	Industrial investments level	+ +/- -	-2 1 2	0.8 0.1 0.1
	Dependence upon the Internet	+ +/- -	-2 1 3	0.5 0.4 0.1
	Level of use of alternative energy sources	+ +/- -	3 1 -2	0.7 0.2 0.1
Expert 3	Degree of mechanisation	+ +/- -	2 5 -2	0.3 0.6 0.1
	Degree of computerisation	+ +/- -	5 -3 -5	0.7 0.2 0.1
	Degree of equipment with technical infrastructure	+ +/- -	4 1 -4	0.2 0.7 0.1
	Area of agricultural land	+ +/- -	-2 4 -2	0.1 0.3 0.6
Expert 4	Transport-wise accessibility of peripheral areas	+ +/- -	2 -1 -3	0.6 0.3 0.1
	Dynamics of ICT development	+ +/- -	3 1 -1	0.3 0.5 0.2
	Rate of technological changes in agriculture	+ +/- -	2 1 -1	0.3 0.5 0.2

Expert	Factor	Trend	Strength of influence	Probability
Expert 4	Degree of diversification of energy sources	+	3	0.6
		+/-	-1	0.3
		-	-3	0.1

Source: own elaboration

In the legal and administrative sphere, most of the factors identified are related to the role of regulations, which are established at the level of the European Union and, in the opinion of most experts, an increase of dependence upon the centrally imposed regulations will bring disadvantageous changes in rural areas. The second category of factors is constituted by the conditions associated with making decisions at local level. Furthermore, regarding the future of the countryside, significance should also be assigned to the liberalisation of the law and its clarity (see Table 3).

Table 3. Identification of legal and administrative factors and assessment of their influence on the future of rural areas

Expert	Factor	Trend	Strength of influence	Probability
Expert 1	Degree of restrictiveness of the legal regulations concerning the revitalisation of rural areas	+	4	0.5
		+/-	2	0.2
		-	-3	0.3
	Degree of clarity of regulations concerning the implementation of the EU CAP	+	4	0.4
		+/-	2	0.3
		-	-3	0.3
Expert 1	Degree of regulation in the laws concerning alternative energy sources	+	4	0.4
		+/-	2	0.5
		-	-2	0.1
	Degree of restrictiveness of laws on maintenance of land in good culture	+	4	0.4
		+/-	1	0.4
		-	-2	0.2
Expert 2	Degree of dependence upon the international law	+	-3	0.6
		+/-	-1	0.3
		-	2	0.1

Expert	Factor	Trend	Strength of influence	Probability
Expert 2	Scope of central regulations	+	-3	0.5
		+/-	1	0.3
		-	3	0.2
	Level of control over the flow of information	+	-5	0.6
		+/-	2	0.3
		-	3	0.1
	Level of control over the flow of human capital	+	-2	0.5
		+/-	1	0.2
		-	3	0.3
Expert 3	Significance of the Community Law	+	-4	0.7
		+/-	-1	0.2
		-	4	0.1
	Degree of self-government	+	5	0.4
		+/-	1	0.3
		-	-4	0.3
	Degree of freedom on the land market	+	3	0.4
		+/-	1	0.4
		-	-3	0.2
	Level of spatial planning	+	3	0.5
		+/-	1	0.3
		-	-2	0.2
Expert 4	Clarity of the legal-administrative procedures	+	2	0.5
		+/-	-2	0.4
		-	-3	0.1
	Liberalisation of laws	+	2	0.3
		+/-	1	0.5
		-	-2	0.2
	Degree of self-government	+	4	0.4
		+/-	1	0.5
		-	-3	0.1
	Role of UE in the shaping of the legal procedures	+	-3	0.6
		+/-	2	0.3
		-	1	0.1

Source: own elaboration

In the sphere of political conditions, the most important group is constituted by the factors associated with the political activity of inhabitants of the countryside. An increase of the level of this activity should, as a rule, bring positive changes in rural areas. High significance is also attached to the democratisation of the political life in the country, as well as the active functioning of the political parties having a peasant flavour. It must be added that peasant parties have been always playing a vital role in the Polish political life. Since the downfall of the socialist system – that is, for more than 25 years now – the representatives of the peasant party (Polish Peasant Party – PSL) have continued to form a group of MPs and participated in several administrations. Experts have also emphasised that the development of rural areas will be significantly influenced by the political situation in the EU and in the world.

Table 4. Identification of political factors and assessment of their influence on the future of rural areas

Expert	Factor	Trend	Strength of influence	Probability
Expert 1	Role of support for competitiveness of rural areas in the assistance programs	+ +/- -	5 -2 -3	0.4 0.5 0.1
	Role of inhabitants of countryside in self-governmental authorities	+ +/- -	5 1 -4	0.2 0.6 0.2
	Role of inhabitants of countryside in political organisations	+ +/- -	5 1 -3	0.3 0.5 0.2
Expert 2	Level of direct democracy	+ +/- -	4 -1 -3	0.7 0.2 0.1
	Military conflicts	+ +/- -	-1 1 2	0.2 0.7 0.1
	Intensity of terrorism	+ +/- -	-2 1 3	0.7 0.2 0.1
	Tendencies to get independent of the central authorities	+ +/- -	4 -1 -4	0.6 0.2 0.2

Expert	Factor	Trend	Strength of influence	Probability
Expert 3	Role of peasant party in the country	+	-2	0.1
		+/-	-1	0.4
		-	3	0.5
	Decentralisation of authority	+	4	0.2
		+/-	2	0.4
		-	-3	0.4
	Political integration in the EU	+	-1	0.5
		+/-	2	0.3
		-	-2	0.2
Expert 4	Political tensions in the EU	+	-4	0.6
		+/-	1	0.2
		-	4	0.2
	Liberalisation of customs policy of the EU	+	-3	0.3
		+/-	1	0.4
		-	2	0.3
	Role of political parties in self-governmental bodies	+	-3	0.3
		+/-	-1	0.4
		-	3	0.3
	Degree of dependence of the state upon the EU policy	+	-3	0.6
		+/-	-1	0.3
		-	2	0.1
	Level of political relations with Russia, Belarus and Ukraine	+	4	0.4
		+/-	1	0.3
		-	-4	0.3

Source: own elaboration

From among the socio-demographic factors, influencing the future of the rural areas in Poland the leading role was ascribed to the changes in the age structure of inhabitants of the countryside. This factor is brought forward by all the experts. The age structure will be the result of the balance of migrations between urban and rural areas, the level of childbearing of women and the balance of foreign migrations. Of high importance will also be the social situation in the countryside, including the differentiation of the levels of wealth and education among the rural inhabitants.

Table 5. Identification of the socio-demographic factors and assessment of their influence on the future of rural areas

Expert	Factor	Trend	Strength of influence	Probability
Expert 1	Social position of the inhabitants of countryside	+ +/- -	5 2 -2	0.3 0.4 0.3
	Share of population in working age in the total rural population	+ +/- -	5 1 -3	0.2 0.5 0.3
	Social capital of rural inhabitants	+ +/- -	3 2 -2	0.4 0.3 0.3
	Share of young women in the entire female population in the countryside	+ +/- -	4 1 -3	0.3 0.5 0.2
Expert 2	Number of births	+ +/- -	4 -1 -4	0.3 0.3 0.4
	Inflow of migrants from abroad	+ +/- -	-5 -1 4	0.8 0.1 0.1
	Inflow of urban population	+ +/- -	4 1 -3	0.6 0.3 0.1
	Level of poverty in the countryside	+ +/- -	-4 -2 4	0.2 0.3 0.5
Expert 3	Degree of depopulation of the countryside	+ +/- -	-3 2 3	0.6 0.2 0.2
	Social disproportions in the countryside	+ +/- -	-4 1 3	0.4 0.4 0.2
	Social pathologies	+ +/- -	-5 1 5	0.4 0.3 0.3
	Social trust	+ +/- -	5 3 -4	0.2 0.1 0.7

Expert	Factor	Trend	Strength of influence	Probability
Expert 4	Rural population number	+	-2	0.2
		+/-	1	0.5
		-	3	0.3
	Level of social activity of rural inhabitants	+	3	0.3
		+/-	-1	0.4
		-	-3	0.3
	Advancement of ageing of rural population	+	-4	0.4
		+/-	-2	0.5
		-	2	0.1
	Availability of social infrastructure in the countryside	+	2	0.3
		+/-	-1	0.5
		-	-2	0.2

Source: own elaboration

In the sphere of nature, the experts indicated similar kinds of conditions. In their opinion, the future image of the countryside will firstly depend upon the processes of adaptation to climatic change and upon the activities. They were associated with nature protection, with an excessive increase of surfaces, then protected in various ways. It is a potential source of disadvantageous changes in the countryside, as resulting from the checks on the possible investment and development projects as well as on the use of modern techniques in farming.

Table 6. Identification of the nature-related factors and assessment of their influence on the future of rural areas

Expert	Factor	Trend	Strength of influence	Probability
Expert 1	Level of biodiversity	+	4	0.3
		+/-	3	0.4
		-	-2	0.3
	Quality of underground waters	+	4	0.4
		+/-	3	0.4
		-	-2	0.2
	Area of ecological farms	+	5	0.6
		+/-	1	0.3
		-	-3	0.1

Expert	Factor	Trend	Strength of influence	Probability
Expert 1	Air purity in the countryside	+ +/- -	4 4 -2	0.4 0.4 0.2
Expert 2	International environmental regulations	+ +/- -	-4 -2 3	0.5 0.4 0.1
	Ecological catastrophes	+ +/- -	-5 -1 3	0.2 0.7 0.1
	Climate changes	+ +/- -	-5 -1 4	0.3 0.6 0.1
	Bioengineering	+ +/- -	5 1 -3	0.6 0.3 0.1
Expert 3	Climatic anomalies	+ +/- -	-3 -3 4	0.5 0.2 0.3
	Magnitude of protected areas	+ +/- -	2 5 -2	0.4 0.4 0.2
	Level of pollution	+ +/- -	-4 -2 5	0.2 0.4 0.4
	Degree of landscape 'going wild'	+ +/- -	2 1 -1	0.8 0.1 0.1
Expert 4	Magnitude of protected areas	+ +/- -	-3 1 2	0.5 0.4 0.1
	Share of the large acreage farms	+ +/- -	-2 1 2	0.7 0.2 0.1
	Role of forestry and agriculture in diversification of energy sources	+ +/- -	4 -1 -3	0.5 0.4 0.1
	Climate warming	+ +/- -	3 1 -1	0.4 0.3 0.3

Source: own elaboration

4. Three scenarios

4.1. *The optimistic scenario*

The factors identified by the experts display a very wide differentiation. Yet the averaged strengths of influence in each of the six groups of conditions considered are not very pronounced. The most optimistic changes ought to be expected in the natural and socio-demographic spheres, while the least important influence – in the opinion of the experts – will be exerted by the legal and administrative factors.

According to the first of the experts, the most advantageous trends for the development of rural areas will take place in the political and economic spheres. These include, in particular, the support for the competitiveness of the rural areas, increasing social and political activity of the rural inhabitants, the dynamic development of the European economy and the stabilisation of exports of food products.

The strength of influence in the remaining groups of factors is only slightly lower. This expert expects the positive changes associated with the improvement in the technical equipment of the rural households, the increase of the share of population in working age and the popularisation of production of healthy food. In the eyes of the second expert, the most important positive influence on rural areas should be associated with the economic and socio-demographic factors. Yet, it must be stressed that the probability of appearance of these positive trends is very limited in the opinion of the same expert. The positive influence of the factors from other groups would be much weaker.

The third expert assigns the most pronounced positive role to the natural and technological factors, among which one finds the following: stabilisation of the degree of mechanisation in farming; development of ICT in the countryside; stabilisation of the area of the legally protected surfaces; decrease of environmental contamination; and the increase of areas of natural landscape. Other groups of factors would exert weaker influence on the development of rural areas, but this expert indicates amongst them a very significant role of the social factors.

The fourth of the experts expresses a decidedly lower assessment of the potential strength of influence of factors. He indicates only one factor – the increase of dynamics of the economic development at the national level –

that could have a really pronounced impact on the positive course of the development processes within the rural areas. In the opinion of the fourth expert, the strength of the positive influence of other factors would thus attain a rather moderate level.

Table 7. Average values of the strength of influence exerted by the factors in the considered groups of factors according to the optimistic scenario

Factor group	Expert 1	Expert 2	Expert 3	Expert 4	Average strength of influence
Economic	4.5	4.0	2.7	3.7	
Technological	4.2	2.5	4.5	2.5	
Legal-administrative	4.0	2.7	3.7	2.2	
Political	4.5	2.7	3.2	2.7	
Socio-demographic	4.2	4.0	4.0	2.5	
Natural	4.2	3.7	4.7	2.7	

Source: own elaboration

On the basis of the analysis carried out, a scenario could be proposed assuming the most advantageous socio-economic changes within the rural areas. This scenario would presume the increase of dynamics of economic growth in Poland. This growth, in turn, would stimulate the positive economic trends in rural areas, including the appearance of new businesses and economic undertakings, the expansion of the job offer and an increase of incomes of the households. The food sector will still be playing the leading role in the countryside, while new functions will appear in its environment (service, production, energy generation). Owing to the specialisation of food production and the high quality of Polish food products, they will be in demand on both the domestic and foreign markets. An important stimulating role will still be played in food production by the agricultural subsidies.

There will also be an improvement in the development of the ICT technologies, ensuring free access to the broadband internet for the inhabitants of the countryside, which will enable the use of e-services and e-commerce and will lead to the wider use of teleworking. On the other hand, improvement of the transport-wise accessibility of the peripheral areas will enhance their attractiveness regarding tourist and recreation activities, and

will facilitate the development of the health-related services. Rural areas will make an increasing use of alternative energy sources, based primarily on the raw materials originating from forestry and farming. This will also contribute to the increase of the functional diversification of the countryside.

The social and economic success in rural areas will be the effect of decentralisation of the authority and of the increased self-governmental awareness of the inhabitants. There will be an increase in their activity in the NGOs and in political organisations. Introduction of the new and more transparent electoral procedures should weaken the influence of the political parties in local authorities and should break down the coteries, existing in some regions, which should first take care of all their own interests. Other regulations and procedures should also limit the local nepotism. Decisions, concerning the directions of local development and the distribution of public means, will be taken by the inhabitants, who have the best knowledge of the needs within the confines of their local homelands. At the same time, there will be an improvement in the legal and administrative system, with the legal procedures undergoing simplification.

Population numbers in rural areas will be gradually decreasing in connection with the increase of the degree of urbanisation of the country, the territorial expansion of the cities and the low levels of childbearing. Improvement of the transport-wise accessibility and the availability of infrastructure, along with the development of the new functions in the countryside, will contribute to limitations in the outflow of population to towns.

The outflow of young women is expected to be significantly curbed. On the other hand, it is also expected that a group of young and enterprising town dwellers will move to the countryside. Due to this process, the age structure of the rural population will improve, but this phenomenon will have a selective character. At the same time, demand will increase for the elements of social infrastructure and, in this respect, the countryside will be self-sufficient to a higher degree than nowadays. The processes mentioned will result both in the improvement of social capital in rural areas and in the reduction of problems associated with social exclusion and other pathological phenomena.

An increase in the social awareness of the consequences of human impact on nature will bring about a more rational use of natural resources. Using pure energy, closed cycles of waste and contaminant management will appear

in areas without manufacturing, as well as producing and processing food with the use of natural methods. Such areas will become attractive in terms of tourism and recreation. Paradoxically, the surface of the protected areas will shrink, where the economic activity of people is sometimes unreasonably limited causing socio-economic stagnation. As the sources of 'pure' energy, the roles of forestry and agriculture will increase. Around this direction of development new jobs will appear and the multi-functionality of farms will increase. A highly significant role will be played by the climate changes. The slow increase of temperature will prolong the growing season, thereby increasing production volume and enhancing the diversity of agricultural production. Yet, the improvement of effectiveness of the farming sector will depend upon the capacity of farms to adapt to the increasing frequency of the dangerous extreme phenomena.

4.2. The pessimistic scenario

When considering the pessimistic scenario, most experts assumed that the disadvantageous processes in the countryside will be the effect of socio-demographic and economic trends. In the opinion of the first expert, in the pessimistic scenario, the disadvantageous processes will result from the negative tendencies in the groups of technological and political factors. The second expert thought that the most disadvantageous changes may be generated by the natural factors (harmful climate changes and extreme phenomena) and the socio-demographic factors. The same person sees also a pronounced role of the economic factors (increase of unemployment and competition from the Asian countries). According to the third expert, the disadvantageous processes in the countryside will get shaped mainly by the socio-demographic conditions (social pathologies and disproportions, as well as lack of social trust) and economic ones (decline of entrepreneurship and limitation of the financial support from the European Union). In the opinion of the fourth expert, the distribution of the negative influences will be more even with the negative processes resulting firstly from economic, political and socio-demographic conditioning factors.

Table 8. Average values of the strength of influence exerted by the factors in the considered groups of factors according to the pessimistic scenario

Factor group	Expert 1	Expert 2	Expert 3	Expert 4	Average strength of influence
Economic	-2.7	-3.7	-3.5	-3.5	
Technological	-3.0	-2.0	-3.2	-2.0	
Legal-administrative	-2.5	-3.2	-3.2	-2.7	
Political	-3.0	-2.5	-2.7	-3.2	
Socio-demographic	-2.5	-4.0	-4.0	-3.2	
Natural	-2.2	-4.2	-2.5	-2.2	

Source: own elaboration

The pessimistic scenario assumes the decrease of dynamics of the economic growth in Poland resulting from the prolonged global crisis and regional political conflicts. The increase of competition from the side of the emerging economies will curb domestic production, resulting in the increase of the share of foreign capital in this production, while this foreign capital aims at transferring profits abroad. The significance of the food sector will drop and the share of food products imported from abroad will then increase. These processes will limit the possibility of the development of new economic functions on rural areas, thereby contributing to conserving the excessive role of the farming sectors in numerous places.

The negative trends in the group of technological factors appear to have a low probability. Yet the concentration of attention in the public investment policy on the metropolitan areas may slow down the development of technical infrastructure in the countryside. In the 'blackest' scenario, liquidation of the regional railway lines, lack of modernisation of the municipal and county roads, liquidation of local coach lines in conditions of unprofitability and the absence of subsidies may even worsen the accessibility to some of the peripheral areas in the country. High technological costs of the "pure" energy and the preference for the nuclear energy will make difficult the process of diversification of the energy sources. This will have a particular impact on the rural areas, where production of energy on the basis of renewable sources has the biggest chance of development and constitutes an opportunity for the future.

Complication of the legal and administrative procedures, along with the lowering of the level of liberalisation of law will make the activity of the small and medium enterprises in the countryside more difficult. The necessity of referring to legal counselling and prolonged procedures related to bureaucratic matters will push down the interest in creation of new businesses. At the same time, the increase of the role of regional and central authorities in stimulation of local development will decrease the activity and the significance of the functioning local groups. The increasing role of Brussels in defining the legal procedures and in execution of law will contribute to a decrease in the possibility of self-development and to the further extension of the bureaucratic maze which is, by now, already blooming.

From among the political factors, the negative role will firstly be reflected in the decrease of the level of cooperation with the eastern neighbours. This will result in the difficulties, related to foreign trade (for instance, exports of food, imports of energy carriers) and in political tensions, making social and the cultural cooperation with neighbours difficult. Political boundary will constitute a barrier to the flow of goods, people and services, and this will bring about further peripherisation of the eastern regions of Poland. Party politics at the level of local self-governmental bodies will worsen corruption and contribute to emergence of local coteries. Excess dependence of the state upon the EU policies will, in the case of increase of influence exerted by the strongest economies, bring about the economic subordination and an increase in the level of social frustration.

The increase in the population numbers in the countryside will result from the movement of urban dwellers into suburban areas and migration stagnation on the traditional rural areas. Problems on the labour market will limit the migration outflow from the countryside, which will conserve the agrarian structure to date with the maintenance of the excess labour in agriculture. At the same time, there will be an increase in the share of population in a post-productive age in rural areas, increasing the demand with respect to the systems of social and health care. Given the ineffective social infrastructure, this will cause many problems associated with poverty and with social exclusion.

There will be an excessive increase in the surface of the protected areas, making it difficult for many municipalities to carry out new investment projects. Tourism and recreation will turn out to be overestimated as the development functions. On the other hand, the development of nuclear

energy and the strong lobby of the producers of conventional energy will weaken the dynamics of growth of 'pure' energy. There will be an increase in the share of the large-acreage farms which, in the face of competition from the farming sectors of other countries, will move towards the industrial production of genetically modified food. Owing to this, overall agricultural production may increase, but problems will appear concerning the selling of the excess food produce. Besides, cheap food will not bring its producers satisfactory profits. Industrial production methods will also lower the quality of the food produced.

4.3. The most probable scenario

In the most probable scenario, the role of the groups of factors analysed is more balanced and their strength of influence is usually rather low. Only the first of our experts assessed the influence of the four groups of factors in a highly optimistic manner – the strength of influence exerted by the economic, technological, legal, and natural conditions is, in his case, only slightly lower than in his optimistic scenario. Regarding the remaining three experts, the average strengths of influence of the factor groups rarely exceed the value of 1, although this influence is usually positive. The most disadvantageous influence of the socio-economic factors is indicated by the third expert and of the legal factors – by the second expert.

Table 9. Average values of the strength of influence exerted by the factors in the considered groups of factors according to the most probable scenario

Factor group	Expert 1	Expert 2	Expert 3	Expert 4	Average strength of influence
Economic	4.5	-1	0	0	
Technological	4.2	-0.7	2.2	1.7	
Legal-administrative	3.5	-3.2	1.7	0.2	
Political	0.7	1.7	0	0.2	
Socio-demographic	1.7	-0.2	-4.0	0.7	
Natural	3.7	-0.2	1.5	0.5	

Source: own elaboration

In the most probable scenario, the stabilisation of the economic growth of the country is assumed. A disadvantageous influence on the economic situation will be exerted by increasing competitiveness from the side of the emerging economies, mainly from the Asian countries as more attractive than the Polish economy. This may result in the loss of jobs in the productive sectors, also including the food sector. The share of agriculture in the GDP will decrease, but, at the same time, its productivity will increase. The limitation of employment in farming and low job generation capacity of the labour market in the countryside may trigger an increase in unemployment. Development of new functions in the countryside and in the very farming sector may constitute an instrument helping to overcome these problems. Support for agriculture from the EU will decrease but, at the same time, there will be an increased promotion of ecological farming.

An improvement in the technical equipment of the countryside can be expected within the frame of the next decades to come. Improvement of transport-wise accessibility will increase the investment-related attractiveness of the peripheral areas, primarily in the domains of recreation (second homes and services, associated with catering to the visitors), tourism, health care (health resorts, spas, residential centres for the elderly) and production of 'pure' energy. Common access to the tele-computing services will increase the share of persons working at home (work-at-a-distance).

Some of the latter will choose to stay in the countryside, far from the madding crowd of the overpopulated cities and suburban zones. In terms of technical factors, the highest significance is attached to the diversification of the energy sources. Countryside will be making use of the new energy sources to a higher degree than towns, but production of this energy will primarily have a local dimension.

The stabilisation and the clarity of the legal and administrative procedures will facilitate and accelerate the paperwork related to the servicing and registering of the new businesses. However, a negative influence will come from the increase of significance of the European Union in the shaping of the legal regulations. Some of these regulations may increase the general bureaucratic burden or impose more complex procedures than the ones in force today. However, the role of the self-governmental bodies in the establishment of local law will not change.

Among the political factors to be analysed, the most pronounced role will be played by the deepening of cooperation with the eastern neighbours. The

political significance of the strongest economies of the Community (Germany, France, United Kingdom, and Italy) will increase. This might bring about political and social conflicts inside the EU and be a disadvantageous influence from the intensification of the global terrorism. Regarding the elections to the local self-governmental bodies, the maintenance of the existing electoral procedures will conserve the party schemes, with the consequence consisting in not always professional management of the local structures.

The socio-demographic phenomena will exert rather negative influence, but this influence will be quite limited. Population number in rural areas will also stabilise and this stabilisation will be accompanied by spatial polarisation. Rural areas within the metropolitan zones and in the vicinity of the sub-regional centres will feature population increase, while the 'traditional' countryside (far from the urban centres and in the periphery) will undergo the depopulation processes. A similar direction of change will concern the age structure of the population – namely on the areas of population growth the age structure will be stable or even may get younger – while in the depopulating areas there will be a slight increase of the share of population in the post-productive age (these areas already suffer from the shortage of young population).

Stabilisation regarding the social activity of the inhabitants of the countryside is now viewed as a rather negative phenomenon, since the level of this activity is not high as of now. Besides, the respective processes will not be conducive to the development of the social infrastructure, primarily in the domains of health care and education, which will remain concentrated in towns and in municipal centres.

There is a high probability that the significance of the large-acreage farms will increase. This process was assessed as negative, in view of the possibility of appearance of the environmental degradation phenomena (soil erosion, increased mineral fertiliser and pesticide use, decrease of biodiversity) and destruction of the cultural landscape. Likewise, the increase of the surface of the protected areas was also assessed negatively, since this will make economic activity in the municipalities more difficult when affected by such protection. Nonetheless, this does not entail consenting to the arbitrary economic activity on the areas of valuable nature. The issue is firstly to avoid the excessive restrictions and unreasonable bans, associated with protection, which would stifle human initiative. An important challenge within rural areas will be constituted by the diversification of energy sources, connected with the use

of a part of the agricultural and forest produce for energy generation and with the development of the wind farms.

In terms of climatic change, the most probable phenomenon is the slow increase of global temperature. In our climatic zone, this will have a positive impact on the farming economy (prolonged growing season) and on the tourist and recreation services, but one should be prepared to face the increasingly frequent extreme weather phenomena (droughts, floods, violent storms, hurricanes).

5. Conclusions

The average values of the strength of influence, exerted by the considered groups of factors, provide the possibility of moving closer to an objective image of the potential development of the rural areas. The trends, which were indicated by the experts in the optimistic scenario, feature a decidedly higher strength of influence than those from the pessimistic and the most probable scenarios.

The roles of these individual factors are balanced with the somewhat more pronounced role of the economic factors and the least pronounced – of the political factors. On the other hand, in the pessimistic scenario, the strength of the influence of trends is more differentiated. The most disadvantageous effects are expected in the domain of the socio-demographic group of factors.

Among the most probable courses of events, the experts do expect a strong influence from the technological factors. All of them have pointed out an improvement in the technological sphere regarding the countryside. On the other hand, the socio-demographic factors will tend, most probably, to hamper the development of the rural areas. However, it should be emphasised that the strength of influence exerted by the trends in the most probable scenario – except for the socio-demographic sphere – serves to assign positive values, this being evidence for the general optimism of the experts.

In the perspective of the decades to come, the image of the Polish countryside will most probably not undergo radical shifts, but it can be proposed that this countryside will be more diversified, more socially and economically active, and more attractive as the place of residence and of work. Making effective use of diversity and of the specific competitive edges

belongs among the fundamental objectives in the contemporary strategies of the socio-economic development of the regions.

The gist of the matter concerns the smart use of cultural identity, promotion of the importance and value of the regional and local products, care for the specific elements of the landscape architecture and taking sufficient advantage of place-based social and economic potential and the natural conditions, including the natural resources. Within all regions, the areas will emerge featuring qualities resulting from the location with respect to the large urban centres and their accessibility, quality of natural environment, as well as specific economic and socio-cultural functions. The mosaic character of the countryside will result primarily from the properties of the sub-regions (local homelands) which will take advantage of their development opportunities in a much better way than today.

Owing to these processes, the attractiveness of the countryside will increase. Improvement of transport-wise accessibility and possibility of working at home (telework) will extend the range of the residential areas distinctly outside of the suburban zone. The choice of the place of residence will be made on the basis of its natural characteristics (vicinity of a forest, a river, or a water body, attractive landscape, etc.), the cultural qualities (e.g. the outlook and the architecture of the village, customs, interesting historical monuments), as well as technical aspects (equipment with high quality technical and social infrastructure, shops, basic services, and so on). Even though agriculture will continue to fulfil an important economic function, the incomes of households will mainly originate from the activities in other sectors of economy (service, construction, energy), or from the businesses indirectly associated with agricultural production (food processing, agri-tourism, protection of nature and of cultural heritage).

These current processes unambiguously imply the increase of the social awareness of rural inhabitants and the increase of their entrepreneurship. One particularly vital role in the development of the rural areas will be played by the small entities functioning in the spheres of service and food production. Family farms ought to secure for themselves appropriate organisational forms allowing for an effective competition in the relevant markets, especially in the food product markets, to guarantee profitable selling of their products. Without a true engagement of a large group of farmers in such undertakings, it will indeed be difficult to succeed.

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Emilia Sarno

Cross-border Inter-Adriatic Cooperation: A Case Study

Abstract

The paper highlights the cultural and legislative framework which favours the cross-border cooperation between the countries on the shores of the Adriatic Sea. It looks at the importance of geographical and socio-economic proximity and analyses the formation of the Adriatic-Ionian Euro-region. This context is useful for the development of those territories, considered marginal, which can renew their economies through cooperation. As a case study, what is analysed is the possible cross-border relations between the Italian region Molise and Montenegro. The two territories have several elements in common and can use cooperation as a means of renewing their economy. Furthermore, the cross-border cooperation is the right strategy to modernise the agricultural sector and strengthen the tourism. For this reason, the paper aims to highlight how the cooperation is the lens through which we can identify the territorial potential which, when amplified through comparison, will emerge more clearly.

Keywords: cross-border cooperation, European Union, Italian regions, Montenegro,

A historical and geographical context

The Mediterranean¹ is the physical space from which numerous civilisations arose and developed: including the Greeks and the Romans, as well as other peoples.

The Mediterranean is unitary and fragmentary, presented as both a space for communication and an area where relations between people of differing cultures could thrive; in fact, it is divided into a substantial number of seas forming basins and sub-basins (Trinchese and Caccamo 2008). The Adriatic Sea reflects the same typical characteristics of the Mediterranean and, for this reason, it represents an effectively natural connection rather than a division between Italy and the Balkans.

The structure of the Adriatic coast has, in fact, facilitated the settling of people from different neighbouring countries such as Italy, Slovenia, Croatia, Bosnia and Herzegovina, Montenegro and Albania, while their geographical location has contributed to exchanges and interactions (Baggio and Skoda Pashkja 2012). This proximity is singular insofar as the position of the Italian peninsula is easily accessible to the people and countries found on the eastern coast. For this reason, Italy has become an indispensable interlocutor.

Moreover, the proximity of the coasts finds continuity onto the main roads built by the Romans permitting for easy access to inland areas. For example, following the Egnatia road, which is a continuation of the Appia road, it is possible to reach the Bosphorus by crossing directly through present day Albania.

Trade relations are therefore of ancient descent. During the fifteenth and sixteenth centuries, the southern regions of Slavia (from today's Slovenia to Dalmatia and Montenegro) and internal territories of Herzegovina, Bosnia and Serbia exported fabrics, leather, fur, iron, lead, copper, mercury, timber, clay for dyes and building materials. In contrast, Italy provided fabrics from Florence and Ascoli Piceno, along with handicrafts, painted terracotta vases, drugs, valuable artefacts, soap, cotton, rice, oil, wine and citrus fruits (Scotti 2007).

¹ On an issue of such importance the main references are: Braudel 1985; Harris 2005; Albera, Blok and Bromberger 2007; Fuschi 2008; Salvatori 2008; Baggio and Skoda Pashkja 2012.

Several documents attest the various forms of alliance, or *isopolitia*, established between cities who had been from opposing sides since the Middle Ages (Carile 1995). The same urban planning² systems were built on headlands along the Adriatic coast and forming strong commercial bonds because the cities were open to exchanges as well as confrontations and clashes (Fuschi 2008). Small and large ports punctuate areas of this stretch of sea, from the Upper Adriatic to the islands surrounding the Greek peninsula and include Trieste, Venice, Fiume, Ragusa (Dubrovnik), Split, Vlora, Durrës, Zara, Corfù, Ancona, Termoli, Bari, Brindisi, Ithaca and Crete. However, the two most important cities were Dubrovnik and Venice. The first³ played a fundamental role because, along with Ancona, it represented one of the possible routes for the trafficking of commercial trade, linking both Western Europe and Italy to the East (Harris 2006). In turn, the Adriatic Sea has been dominated by Venice for centuries.

Between the two sides there was also cultural proximity, although it was not equal because Italian traditions were considered superior. It is then no wonder that there were consistently large migration flows from the east to the west coast (Botta et al., 2007). The Slavic presence in the territories of central-north Italy dates back to the beginning of the thirteenth century; however, migrations begin after the defeat of Kosovo in 1389. Of extreme importance is the date of the Turkish conquest of Constantinople in 1453 which paved the way for the Ottoman's expansion along the Balkans. From that moment Turkish pressure created the perfect conditions for the Slavs and Albanians to escape. The latter then began to be present in central and southern Italy, particularly in Marche, Abruzzo, Molise and Calabria.

However, the phenomenon is not unidirectional being that there are also Italian communities to be found on the East Coast with the most important being located in Kotor (now the town of Montenegro), where Venice rule enabled Italian settlements to come from Venetian areas.

These elements highlight such a strong contiguity between the territories touched by the Adriatic Sea that not even the conflicts between the Ottoman Empire and Christian Europe were able to stop it. Only Italian irredentism

² See the volume edited by Pavia 1990, which collects technical studies on the plants of urban city on the two shores of the Adriatic.

³ The ancient city of Ragusa is now known as Dubrovnik; the two place names attest to the dual soul of this city: the Greek-Roman and Slavic.

and German nationalism, with their expansionist ambitions, created a rift in the Balkans which continued from the beginning of the twentieth century to 1975 when the Treaty of Osimo established the borders between Italy and ex-Yugoslavia. The Treaty of Osimo marked the end of the “long Adriatic post-war era and opened up the possibility of an economic cooperation to trigger positive inter-relations between the two countries and the more delicate relations between locals and ethnic minority groups” (Iuso 2002:163).

The different formulas for cross-border cooperation and the establishment of the Adriatic-Ionian Euro-region

The geographic and cultural proximity has made the consolidation of multilateral relations between the Adriatic countries possible and has tried to sustain both local processes of growth and cooperation among people. As mentioned in the previous paragraph, trade arrangements started to be underwritten in the 1970s. The economic cooperation between the Member States of the European Economic Community and the Mediterranean countries was legitimised at the Paris Conference in 1972 (Cafaro 2012). The path has been neither easy nor linear because of the long and painful disintegration of ex-Yugoslavia along with the domestic political events of Greece⁴. However, a mature conception of cooperation, which led to partnerships, has gradually developed (Scorrano 2006).

This development was made possible by the European Union which, since 1992, has been pursuing both a vertical integration between European and international institutions and a horizontal integration through an arrangement of a free trade area (Vellano 2014). In particular, the European Commission launched an initiative in 1990 known as INTERREG for the promotion of cross-border networks both in European countries and the countries of Central and Eastern Europe⁵. In this context, there was much interest in the international organisation named the Adriatic-Ionian Initiative, promoted

⁴ Between 1967 and 1974, Greece was ruled by the military.

⁵ The 1990 event was the first of a long series of INTERREG which favored cultural, economic and social issues.

at the Conference in Ancona⁶ on 19th and 20th May 2000. It represented “an instrument aimed at strengthening and consolidating the cooperation between the countries on the two sides of the sea in a wide range of areas such as culture, inter-university cooperation, the fight against organized crime, environmental protection, the boosting of tourism, economic cooperation, the development of transport and maritime cooperation” (Rossi 2003: 1).

This initiative also had another advantage. In fact, it was the starting point for the creation of important organisations such as the Adriatic and Ionian Euro-region. They are the result of a precise political orientation: to set up European groups of cross-border cooperation (EGCC). This strategy regulates relations between two or more EU Member States, while also the non-EU countries and allows the organisations of several States to be associated without subscribing to an international agreement, ratified by national parliaments (Abbati 2010).

The Adriatic Euro-region was founded by 22 territorial entities⁷, which are Italy, Slovenia, Croatia, Bosnia and Herzegovina, Montenegro and Albania, and in Poland in 2006. These were not only European member states, but also both pre-accession countries and states not interested in entering the UE joined the Adriatic Euro-region. The general aims here were the strengthening of stability of both the Adriatic and especially the Balkan regions. The specific objectives were the promotion of a sustainable development and an economic and social cohesion among the participating institutions (Marušić 2008).

This institution has led to the creation of a group of cross-border co-operations (EGCC) and has generated a careful consideration of the, “Adriatic Sea which from the border line becomes a unifying element of peoples and nations. Countries that had previously had serious problems with each other

⁶ The Conference was attended by the Heads of Government and Foreign Ministers of the six riparian countries (Albania, Bosnia and Herzegovina, Croatia, Greece, Italy and Slovenia, to which is added the Yugoslav Federation after the democratic breakthrough in November 2000).

⁷ The initial members are: the Italian regions of Abruzzo, Friuli Venezia Giulia, Emilia Romagna, Marche, Molise, Puglia and Veneto, the Slovenian municipality of Isola, Erzegovese canton of Narenta (Croatia), the municipality of Kotor (Montenegro) six Albanian prefectures: Fier, Shkoder, Durres, Alessio, Tirana and Vlora. See the statutes of the foundation of the Adriatic Euro-region, 2006 on the website: www.adriaticeuroregion.org.

then became partners in a partnership focused on the Adriatic Sea as the main “resource common to all countries” (Leoni 2007:64-65). From this perspective, the next step is understandable; namely, the extension of this Euro region in the Adriatic-Ionian Sea.

In Termoli on 15th January 2013, the general assembly of the Adriatic Euro-region approved the statutes amendment to extend into the Ionian basin, giving it the name of the Adriatic-Ionian Euro-region⁸ and admitting new members, such as three Greek regions. It was conceived as an innovative structure of interregional and transnational cooperation that aimed to strengthen both democratic processes and the European integration of the Balkan countries. It can be considered the first “EU macro-regional strategy” to involve many countries (Albania, Bosnia and Herzegovina, Montenegro and Serbia) cooperating with the European Member States (Croatia, Greece, Italy and Slovenia). Its creation aims to both consolidate economic cooperation and develop a common governance of shared problems such as *environment, energy, transport, fishing and coastal management, rural development, tourism, cultural and university cooperation, citizen protection and cooperation*⁹.

The main strategy is focused on the opportunities of the Blue Economy (aquaculture, fishing, blue biotechnology, marine and maritime services, etc...) and a sustainable development of coastal tourism. However, research, innovation and the strengthening of small and medium-sized enterprises are due to be enhanced. In fact, its aims are to exceed the vision of a Europe that pays little attention to the Mediterranean and the Balkans, thanks in addition to the key role of Italy and mainly of the Italian regions¹⁰ which take advantage of the European contributions encouraging bilateral and multilateral combined projects.

⁸ See the statute of the Adriatic-Ionian Euro-region Foundation, 2013. This is the third of the continents, after the Baltic Sea and the Danube. The documentation is available on the official website: www.adriaticionianeuroregion.eu.

⁹ See the statute of the Euro-region Adriatic-Ionian Initiative, 2013, available on the official website: www.adriaticionianeuroregion.eu.

¹⁰ For an examination of the results of cooperation experiences see Herlja 2009; Ricciardelli and Urso 2013; Custro 2013.

In this context, a research project¹¹ has been set up to establish stable cross-border relations between the Italian region of Molise and Montenegro. The two territories have several elements in common and, as the next paragraph clarifies, they can use the cooperation as a means of renewing their economy. Moreover, as will be shown, the cross-border cooperation is the right strategy to modernise the agricultural sector and strengthen tourism.

Common factors between Italian region Molise and Montenegro

The favourable socio-political environment has allowed for different approaches to be employed between the territories of the two shores of the Adriatic Sea, leveraging ancient and more recent proximities.

But what are the common factors between Molise and Montenegro?

First, they have homogeneous environmental features such as coasts and mountains. These are two factors that have expressed common anthropological models. The mountainous and hilly areas were places for shepherds and farmers, where agriculture has been replaced by transhumance (Sarno 2013). This anthropological-territorial model has persisted through the centuries and has only been interrupted by the discontinuity of the industrial society, requiring mountain and rural areas to find a new centrality (figs. 1-2).

The coast has given way to an ambivalent pattern. It has become the crossroads for meetings and exchanges and of dangers coming from the sea. It contains fundamental economic potential, such as the traditional fishing industry and commercial trade, which are as current as tourism. In relation to these two landmarks, Molise and Montenegro have plenty of areas of high naturalness and biodiversity: “Montenegro can be divided into two main bio-geographical regions – Mediterranean and Alpine – and has a very wide range of ecosystems and habitat types for a country of its size. There is an area of flora and fauna from the cold mountainous north and south, to the warm Mediterranean coast in the west” (Nikolić and Krivokapić 2015:27).

¹¹ This study is part of a research project started in 2011 by ARSIAM Molise (Regional Agency of Agricultural Research of the Italian region of Molise) as part of a cross-border programme of cooperation between Molise and Montenegro of which the author is coordinator.

On the other hand, Molise has a composite system, diversified and full of ecological niches which increase the degree of biological diversity to the highest levels in Europe (Di Blasi et al., 2001). This is confirmed by floristic research which indicates that there are more than 2,500 species of regional flora.

Biodiversity, as the third common landmark, is a resource which can be used for the economic wealth of the areas in terms of strong rural vocation. Thanks to it, the agriculture has proven to be one of the economic pillars of these areas and now requires a precise reflection to develop a new rural vision. With this in mind, tourism can also expand its strategic value becoming a starting point for territorial promotion.

What is more, environmental factors and the lack of consideration given to the innovation of economic processes have caused territorial imbalances both in Montenegro and Molise. Populations are concentrated in the major towns or on the coast, whereas the mountainous and hilly areas are subject to depopulation.

In fact, Molise and Montenegro are not up-to-date regarding social, economic and organisational matters, due to another common geographic factor: peripheral location. The lack of accessibility caused by the orographic structure of the territories has influenced the development of infrastructures and has limited territorial relations which, nowadays, are essential. It is this fundamental to join European organisations and projects and to participate in inter-Adriatic relations to solve this problem and aim at developing their potential.

Figures 1-2. Maps of Molise, a region of central Italy and Montenegro



Cooperation for a new rural vision

Both transhumance and agriculture, which are focused on local consumption, were two important pillars of the Molise and Montenegro economies with organisational methods being developed in the diffused presence of those family-run farms having difficulty in selling their products. One of the objectives currently pursued is the development of chains to improve the agro-food sector such as the processing of meats, dairy products or the wine production. The integration between agriculture, livestock, industry and food trade through both the unification of small units and the modernisation of production facilities is then to be encouraged.

However, local products, such as some dairy produce, honey, floral resources and regional species of grapevine, which are considered as niche but represent the specialities of these territories, must not be neglected. For this reason, a new rural vision can be beneficial to the territorial and demographic imbalances, caused by the flight from small areas to cities, in search not only of professional opportunities but also an urban quality of life. Moreover, both territories have areas at different altitudes which are not suitable for farming but are functional for other forms of rural development, thanks to their environmental and landscape qualities.

In the perspective of sustainability, the projects and cooperation experiences must necessarily consider the reflection on rural areas as crucial places of development (Van der Ploeg 2006; Woods 2005). Sustainability should be considered as the interaction of four essential elements: nature, culture, economic factors and social ties: "The diversity, which can be perceived in terms of biodiversity of landscape and historical heritage, but also as an opposition to the approval to the ways of life and consumption, becomes a fundamental element for rural recovery. The new concept of rural is part of a broad discussion about local development, based by the exploitation of local resources and local specifics which focuses on the conservation of the complexity of environmental, economic, social, and the balance between places" (Ruby 2007: 8).

For this reason, providing multi-functional rural activities is the best strategy: organic crops, horticulture, educational and hypnotherapy farms, farm holidays, and nature trails to be used also for non-competitive sports (Van Huylenbroeck et al. 2007). Moreover, multi-functionality becomes an instrument for territorial promotion (Fuschi 2012) because, if it is supported

by an adequate reorganization of small centres through the development of services and infrastructures, constitutes a reduction in migrations and can create job opportunities.

In this context, cooperation becomes fundamental, especially if it is decentralised, because “it has a concrete and measurable dimension which is made of interaction, reciprocity, dialogue and collaboration” (Pollice 2013:10). It must be based on two factors – research and innovation – which leads to the emergence of planning that can both identify resources and opportunities and, above all, to define coalitions and lasting decision-making structures capable of responding to changes relating to economic situations (Rinaldi 2013:159).

Establishing stable relationships between research institutes, universities and firms, the paths of applied research can be implemented to promote the typical traits of Molise and Montenegro, to select technological and biotechnological instruments, which are useful for improving production, and to identify new forms of marketing. The exchange of know-how may both support the productions of each area reciprocally and lead to the implementation of common products.

Other project activities are necessary to strengthen the protection of valuable landscapes through the identification of both forms of accessibility and of conditions of exploitation, whereas feasibility studies are functional for the establishment of eco-museums¹². The cooperation can be an advantage both scientifically and operationally, while any action, instead of remaining isolated, takes advantage of the establishment of an inter-institutional and cross-border network.

The common production of primary products also deserves attention, whose quality by type must be improved especially from the point of view of environmental safety. In these cases, the training of both specific figures and entrepreneurs becomes crucial to adopt environmentally-friendly defensive strategies with a low environmental impact. If ecological purposes are turned into concrete commitments, then quality will become a primary factor.

These choices are in line with EU directions and cross-border cooperation. In this sense, they could be the right synergy for the expansion;

¹² The establishment of eco-museums would move in line with a cross-border project already made ADRIAMUSE, which has enhanced the museums on the two shores of the Adriatic; see its website: <http://www.adriamuse.org/>.

for example, regarding organic farming. Recently the European Commission has reaffirmed its importance and aims to promote its diffusion by facilitating transition to organic farming, by introducing the possibility of joining a system of group certification and by facilitating exports¹³. In this sense, training programmes, internships and work experiences can develop programmatic actions which, if created 'in tandem', can develop a system of local and partial experimentations.

In short, cooperation is not only a tool for disseminating a new rural vision but the lens through which to identify the territorial potential which, amplified by comparison, will emerge more clearly. However, aside from requiring both the foresight of authorities and enterprises and the efforts of experts and researchers, the cohesion of local communities and their active participation in decision-making and building synergies with other economic activities such as tourism.

From tourism to tourisms: a shared perspective

In 2014, according to information from the World Tourism Organization (UNWTO), Mediterranean countries are still a strong attraction for tourists despite the current economic crisis and the need for new sector management policies. For these reasons, many European cooperation organisations have identified tourism as a key objective for overcoming the disparity between places with high attractiveness and areas marginally touched by large flows of tourists.

Tourism is definitely an asset to Molise and Montenegro, although the development of the first in this sector is incomparable to that of the latter both in economic terms and for the number of predominantly foreign visitors. However, the document stipulated by the Ministry of Tourism and Environment of Montenegro in 2008 – *Montenegro Tourism Development Strategy to 2020* – shows the challenges of contemporary tourism in line with the latest literature (Conrady and Buck 2011), indicating the competition inherent to a global market and increasingly demanding tourists. The tourist boom experienced by this young country does not camouflage the critical

¹³ See the website: <http://europa.formez.it/content/agricoltura-organic-new-proposed-commission-european>.

issues investing Molise where the sector is not completely taking off. For these reasons, the afore-mentioned Montenegrin document focuses on some important objectives similar to the tourist planning of Molise in 2013; namely, the diversification of supplies, out of season experiences, improvement of tourist accommodation and infrastructures.

Therefore, it is necessary to overcome the development model based on seaside and seasonal tourism both to enhance different territorial potentialities and to estimate the plurality and heterogeneity of tourist demand. Though with the due distinctions, the shared prospective is represented by the shifting from tourism to *tourisms*, from the stereotypical figure of tourist to that of sensitive and aware travellers (Corna Pellegrini 2007; Page 2011).

Promoting territorial potential means focusing on rural tourism as an integral part of the new rural dimension, as previously discussed. Moreover, local specialties, from wine to cheese, can be exploited in this context for connoisseurs of taste. Moreover, natural areas, which are present in both countries, provide the suitable habitat for doing sports such as hiking and mountain biking and are generally aimed at nature lovers.

However, this is not enough. It is essential to create both intra-territorial and inter-territorial synergies between the different opportunities. Otherwise, every formula – rural, gastronomical, oenological, naturalistic or cultural – may appear weak: “In this way, single resources, which would not be able to generate an autonomous tourist demand, acquire an added value when they are incorporated into a system. In the same way, internal or rural areas can get out of their marginal position and find a place in the local tourist system” (Rinaldi 2013:156). From this perspective, the integrated resources management and the activation of bottoms-up policies (Dallari 2007) both give centrality to local communities and respect the guidelines of the European Charter of Sustainable Tourism (Dematteis et al. 2010).

A farsighted planning of tourist accommodation rather than a focus on big hotel facilities should promote new models of hospitality such as a ‘decentralised hotel’. The use of existing structures has the advantage of putting the tourist in the social network of the host community reducing environmental impact. Therefore, cooperation, in this case, is the pick for a common and shared reflection on the challenges of global tourism. Programmed actions must aim to train experts who know how to enhance local resources and build those synergies previously mentioned, but also know how to support the qualitative development of tourist accommodation.

The involvement of local populations in permanent laboratories for meetings and seminars appears useful to turn them into host communities able to share their territory and not to distract tourists eager to escape from their routine, but to place the focus on travellers interested in learning and understanding.

Finally, thematic “cross-border” routes can be designed and created. A significant attention to maritime transport, but mainly to tourist ports—a priority objective in the documents of the Euro-region. It becomes the basic factor to create pathways to make Molise and Montenegro known ‘in tandem’. Thus, the cooperation acquires an added value because it can satisfy the needs of travellers attentive to cultural values and fascinated by the comparison.

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The Hutsuls in South Bukovina: from Rural Tradition to Sustainable Development

Abstract

The Hutsuls, an ethnic group belonging to the Bukovina's agro-forestry and pastoral area, still preserve ancient folk traditions which generate friendly practices and attitudes towards the environment. Globalisation and modernisation have brought about changes in the local rural traditions which, on the one hand, threaten their singularity, and on the other hand, set the stage for a new start. The paper aims to analyse the perception of the Bukovina's communities on the tradition-sustainable development relations considered from a double perspective: the Hutsuls' traditions and the evolution of the group itself under changes in Romania in the last 25 years.

Consequently, our approach has sought to make a correlation between the information collected from the scientific literature, the answers given in a field survey and the opinions expressed in the media concerning this subject. The results of the study have shown that both the occupations and the traditions of the Hutsul ethnics, as well as their spiritual and cultural life, are strongly linked to the natural elements of the environment which the Hutsuls consider to be the basic resources for their existence. However, given that nowadays young people migrate abroad, the community's perception is indicative of a particular concern to do with the viability of this ethnic group; that is, the human right to

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turn to modernisation and the efficiency of multicultural policies application in Romania. The study is hence useful from several points of view: it can disseminate information on a national level concerning this little-known ethnicity; it can promote the role of the ethnic groups in reaching the local objectives of sustainable development; and it can supply the authorities with the necessary information for taking the right decisions, be they political, cultural, economic or demographic.

Keywords: Hutsuls, South Bukovina, sustainable development, traditions, rural, Romania.

Introduction

The Framework Convention for the Protection of National Minorities (1998) and the European Charter for Regional or Minority Languages (1998), stipulate that national minorities are cultural assets for every state, which is why they should be protected. Aside from a number of community provisions, the documents emphasise the need to increase and promote the necessary conditions for the preservation and development of their culture, language, traditions and religious identity, banning all forms of discrimination and all measures that might alter the demographic composition of an area to the detriment of minorities (European Council, 1995). As a member state of the European Union, Romania observes the rights and freedoms of national and ethnic minorities, according to the Romanian Constitution and the European legislation. The distribution of these ethnic groups on the Romania's territory mirrors the synergetic impact of the historical, cultural and economic factors, while their persistence over the time is explained, among others, by the endeavour to preserve their ethnocultural identity (Tîrcomnicu 2013).

According to the 2011 Population and Housing Census of Romania, minorities account for 10.4%. The total number of Hutsuls is not published, as the Nomenclature of ethnicity and language (2011) includes Hutsuls (subcode 1403) in the Ukrainian group (code 1400) and thus the methodology counts them as Ukrainians. Moreover, many of them declared themselves also Romanians. Consequently, their number is hard to determine based on official documents, which is why we have had to turn to other studies concerning their life. Thus, according to Gheorghe Nimigeanu, the Hutsul

population amounted to 14,348 people in 1945 (Iosep 1999), but in 1970 their number dropped to only 10,000 (Tufescu 1970).

The Hutsuls are an ethno-cultural group belonging to the Carpathian highlands, different from Boyko and Lemkos populations spreaded almost in the same region (Nikitin et al. 2009). Today, they live both in Romania (in the northern parts of the Suceva and Maramureş counties) and in Ukraine (in the historical province of Bukovina), forming a region named “Hutsulshchyna”. Moreover, some could even be found in Poland and Slovakia (Figlus 2009). Their origin and name have been subjects of many debates, but despite the fact they have been associated with the Ukrainians (Soukand & Pieroni 2016) and Ruthenians (Nistor 1915; Tufescu 1970) they consider themselves to be a freestanding ethnicity.

According to information provided by documentation, from the 17th century the Hutsuls came from the Pokuttya Mountains ruled by Poland at that time and settled south of the Cheremosh Valley, in the [rare woods] belonging to the monasteries or in the areas inhabited by *răzeşi* [Romanian free peasants]. This process was only recorded in the documents of the Austrian administration in the 18th century because the Hutsuls were not initially allowed to own the cleared lands, as the Moldavia's rulers granted this privilege only to the *pământenii* [autochthonous population] (Nimigeanu 1945). Despite the denial of this right, the Hutsuls continued to migrate in this area during the Austro-Hungarian administration from Galicia, having economic, military and religious reasons for doing so (Boboc-Cojocaru 2010). At the same time, migration was easy as the borders ceased to exist (Nimigeanu 1945).

Hutsuls' migration was gradual and sporadic; people came in small groups or as families in the mountain areas covered by *branişti* [rare woods] belonging to the monasteries Putna, Moldoviţa, Voroneţ and, to a lesser extent, Suceviţa (Iosep 1999). The number of Hutsul families increased in those communes lying on the upper valleys of Suceva (Izvoarele Sucevei, Ulma and Brodina), Moldova (Modova Suliţa and Breaza), Moldoviţa (Moldoviţa and Vatra Moldoviţei), Bistriţa Aurie, Cârlibaba and Țibău (Cârlibaba). Their presence was also recorded in the *branişte* [rare wood] belonging to the Voroneţ monastery, as well as in Ostra, Gemenea and Stulpicani which were three settlements situated in the Suha basin (Vasilcu 2006). The last recording made in 1943 showed that 9,942 Hutsuls lived in this area, respectively 64.4% of the total population (Nimigeanu 1945).

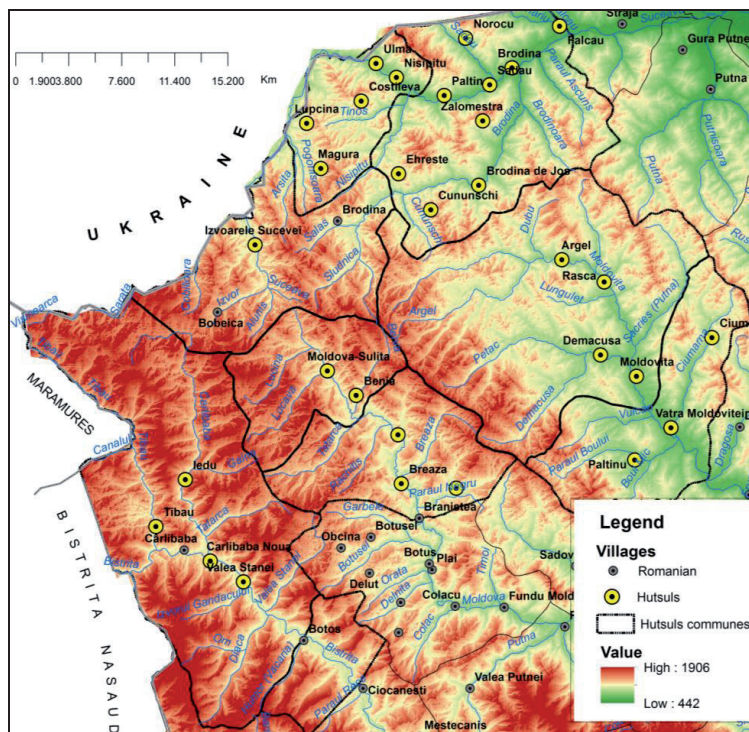
The aim of the study has been to analyse the perception of the communities living in Bukovina of the relationship between traditional and sustainable development, seen from a double perspective. The Hutsul traditions and the evolution of the ethnic group itself in the context of the last 25 years Romania's changes. In this respect, the objectives of our research are to highlight Hutsul's sustainable ethno-folkloric elements, which are specific to the Romanian village in Bukovina, and to analyse the effect of endogenous and exogenous perceptions on the Hutsul communities, taking into particular account the vulnerabilities connected to their ethnicity in the context of the globalization and changes of the Romanian society.

Research Methods

The study relies on a bibliographic research that takes into account both monographies and summary works, dealing with the national minorities and especially with the Hutsul one. At the same time, we reviewed the national and European legislation regarding the minority groups and studied thoroughly the sustainable development theoretical and applicative strategies. Based on the bibliographic data corroborated with the observations in the field, we have been able to come up with a map showing the spatial distribution of this ethnic group over the Suceava County's territory (Fig. 1).

To study how local people perceive Hutsul ethnicity, but also to collect information about the rural reality of this community, we have applied a survey using the interview and the snowball sampling technique. This is because people become more receptive to a researcher when the latter has been vouched for by a friend as trustworthy. The interviews were applied in twelve villages populated by hutsuls, mostly grouped on Modovița and Suceava Valleys, and less on Modlova and Bistrița, in February 2016. The sample dimension was established by taking into account the usual requirement of studies to work with different numbers of interviews (Morse 1994; Bernard 2000; Bertaux 1981).

Figure 1. The settlements in the Suceava County that are populated by Hutsul ethnics



However, regardless of the type of qualitative research, 15 is the smallest acceptable limit (Adler & Adler 1994). On the other hand, the number of respondents in social science research should be at least 12 to 60 or at least 6 (Guest et al. 2006), depending on data saturation. On the basis of this account, we based our research on 18 people, validated from the initial 20. Among 75% are Hutsuls, almost equal in gender and grouped in three generations as the following: 22.2% aged between 18 and 24; 24.3% over 60 and 66.5% between 25 and 59 years old to capture specific points of view. All the people have given us their consent for processing the interviews, which is why, in terms of respecting their privacy, all documents were coded (Matei et al. 2013) using the following symbols: “H” for Hutsuls, “R” for Romanians, “f” for female, “m” for male, while for their age we used the corresponding numbers, without giving the name of the villages in which they live, just the river valley.

At the same time, we have monitored the social media, which have been broadly defined to refer to “” (Murthy 2013). We have also interrogated the sites with opinions and comments about the origin and customs of the Hutsul minority, as this is a useful tool for recording the endogenous and exogenous perception of an ethnicity that is relatively little known by the Romanian population.

Results and discussion

Sustainable development attitudes reflected by the occupations of the hutsul minority in South Bukovina

Hutsuls belong to the mountain typology, as they have turned to economic activities supported by simple occupations, sometimes even primitive, which have been for generations in harmony with the environment and the resources it provides (forests and pastures). They have their own knowledge and skills related to animal husbandry (especially cattle, sheep and horses), but also to wood harvesting and wood processing.

The rural landscape is, amongst others, the expression of a type of attachment to domestic animals. Conventional transhumance has changed because, during the cold season, the animals are kept within the household, while in summertime they are brought into sheepfolds to take advantage of the mountain and subalpine grasslands. Thus, the cattle and the sheep are cared for by shepherds who, in most cases, are also sheepfold organisers. The Hutsuls who own lands in the vicinity of their households turn them to account during the summer season through grazing. The animals, especially the cattle, are kept overnight in temporary shelters called *șuri* [barns].

Although the population is elderly, the number of animals kept in one's farm is still large, except for the Huțul horse, a well-known autochthonous race, specific for the Oriental Carpathians, very resistant for the difficult mountain routes and very useful for wood harvesting. The special connection between the Hutsuls and the animals is revealed by the practices and customs they exhibit during the great religious holidays of the year, when the animals are sprinkled with holy water, carefully nourished and groomed or even left loose. The authors witnessed this practice on Saint Charalambos holiday, celebrated on February 10, when Hutsuls go to the church to consecrate the bran and flour, which they later give to the animals when these are ill.

Another celebration carefully observed, especially by the elder Hutsuls who deal with livestock, is Saint Vlasie (February 11), who is believed to protect people against weasel (*Mustela nivalis*) bite. From the applied questionnaires, one can see that people are afraid of the natural threats and they believe that these can be alleviated by faith or religious practices: *In stormy weather, we light the candle consecrated on St. Charalambos holiday, to keep thunder and lighting away from our home* (H₁₂₁, H₁₅₄).

Another traditional activity that highlights the connection existing since ancient times with the forest environment is wood harvesting. We can notice an emotional tie between the Hutsuls and the forest. Traditionally, woodcutters worshipped the tree that was to be cut and begged forgiveness for their deed and shows a subtle religiosity, doubled by temperance, even though almost all the household items and the furniture were made of wood by the householder. Wood processing was an occupation specific for Hutsul males, focused on carpentry, woodwork and the construction of wood houses, along with the art of woodcarving.

In contrast, the Hutsul women were in charge of various rural activities: housekeeping, the processing and spinning of wool and hemp and canvas weaving, which was used for manufacturing the traditional clothing products, carpet and rug manufacturing, etc. As many of them have adopted conventional clothing, keeping some elements (headkerchief, fur cap, waistcoat), the complete traditional/festive costume is on the verge of extinction: *“For the cultural exchanges in the country and in Ukraine we had to borrow old costumes”* (H₁₇₅). At present, there are no workshops or households to preserve the art of sowing and weaving the traditional costumes.

Hutsuls have a good knowledge of medicinal herbs and of the food resources of their natural environment (forest) (Soukand & Pieroni 2016). They claim to be the first who prepared several products among which the cranberry stum is known for its special curative and nutritious effects. Agriculture is less developed because arable lands are scarce, fertility is low and climate conditions are harsh. People usually grow potatoes, barley, oat and buckwheat.

The preservation of these traditions might be judged as an attribute of isolation and poverty. It has a lot in common with the systemic vision of the planet, which advocates the use of local materials to diminish the negative effects induced by transport and power production activities. At the same time, this approach gives the people the chance to obtain safe natural

products. The family passes the traditions to the new generations: “*H_{f21} „I’ve learned from my parents by watching and doing”; H_{f61} „Nobody compels the Hutsuls to preserve their customs; they learn them... from one another”.*

The attraction to the forest environment with all its fauna resources has stirred within the Hutsuls’ souls the hunting sense and the passion for weapons. All households possess hunting weapons like ax, hatchet and various traps made of brass. Although poaching occurs frequently (“*I have heard that people deal with poaching, but they take only what they need*”, H_{f57}), hunting is practiced rationally, with the purpose of providing for one’s family needs, without trespassing on their hunting laws. *Poroșneafa*, an accessory worn by men, is composed of a belt that holds a container made of goat horn or antlers used for storing the gunpowder is indicative of the Hutsuls’ disposition for weapons and hunting. Finding antlers or goat horns is another secret of this ethnic group. These are sold on the black market, used as decorative objects or turned into raw material for making “antler tablets”, saltcellars and buttons for clothes.

An element of pride is *inchistritul ouălor* [Easter eggs painting]. Hutsuls say that this custom-occupation, which has been assimilated by the entire population in Bukovina, is specific for their ethnicity. They present as arguments the specific decorative elements of this art: the antlers, the Heaven’s Stairway, the shepherd’s wand, *manica* [a red flower], the plow, the rake, the fish, the lost path, etc. (Fig. 2) and the tool employed for this craft, called *chișiță* [a kind of needle used for painting]. In the Hutsuls’ mind, the egg is a symbol of the sun. In the past, people used natural dyes and bee wax, while the predominant colours were black, mauve and blue.

Today, Easter egg painting has spread to every Moldova region, using emptied pieces. At present, the Hutsuls have adapted this craft to the market economy because Easter painted eggs are sold with the occasion of tourist or agricultural fairs like, for instance, the Egg Fair organised in Suceava City. Several Hutsul ethnics have dispatched the eggs to the museums (H_{f57}), while others develop their own centres for selling souvenirs in their households, especially in the villages with tourist potential (H_{f64}).

Figure 2. Hutsul designs on Easter painted eggs. Photo: Cojocaru Ioana, 2016.



We have observed something of an adaptation of Hutsuls to a market economy, even if only sporadically. Some families are involved in tourism activities by renting horses for rides or by supplying homespun fabrics that will be sold as souvenirs (*"I weave in the house for my daughter and she makes souvenir purses"*, H₁₇₅).

We did not notice the same "adjustment" or acceptance of the migration phenomenon affecting the young people who have gone in search of work in other European states. Under these circumstances, the elders think it impossible to pass on to them this tradition, but the young interviewees have claimed that they knew all the secrets of the occupations (*"I know to do anything in the house"*-H_{m18}). Some of them learned them within the family, while others had been involved in programmes initiated by schools, townhalls or ethnic associations.

Integration of Dwelling and Housing in the Natural Environment

The Hutsuls' ancestors used to build their houses depending on the resting place of their cattle. Later, the houses began to form a core on valley bottoms. Consequently, the traditional Hutsul household is now extinct. While it still existed, it resembled a fortress surrounded by massive fences, made up of thick fir beams, 20 cm in diameter, placed horizontally and covered by wood shingle roofs disposed on two levels. The courtyard was closed by large

gates equipped with a round or square roof, depending on their size. The household's oldest element was the house, the roof of which was extended at the back to form a shelter for the cattle.

With the passing of time, people built stables in the courtyards and barns as far as 200m away from the house (H_{175}). The other components that made up the household were the following: the warehouse, the cellar, the woodshop and the larder, called , which served as a deposit for food and clothing. The roofs were made of wood shingle, fir or spruce, 1.5-2m long and 15-20 cm wide, having a durability of more than 50 years. The windows of the houses were small and separated into four panes by a wooden cross, which was meant to cast out evil spirits because the Hutsuls were very superstitious people, believing in spells, curses and incantations.

On the inside, the traditional houses were divided in three chambers: *horomi* [vestibule], room and larder. The stove in the main room was very important. It was built in the corner lying between the vestibule's wall and the exterior one, occupying nearly half of the room and concentrating around it most of the necessary tools for cooking. Near the stove was the bed, which was used for resting and for storing clothes. In the corner opposite to the one with the stove were the table and the benches, whereas in the corner next to the door was *blidarul* [the dish shelf].

The walls, which were made of wood beams padded with moss, are nowadays painted in white and adorned with pictures, rugs, *lăicere* [wool carpets], towels and the habitual religious icons, placed on the eastern side. The basic furniture in the Hutsuls' houses and the indispensable inventory (*ciubere* [tubs], *bărbânțe* [wooden staves recipients], *budace* [wooden vessels used for curdling milk], *cofe* [wooden vessels for storing milk or water], *ploști* [wooden flasks], hope chests, and pipes) were also made of wood. In older times, but less and less today, wooden storing vessels were largely used for milk processing, another occupation that the Hutsuls have mastered very well.

The women's items included the loom (Fig. 3) and the wool-working tools (the spinning wheel and the distaff), by which they used to weave or knit to meet the needs of their households or, as it happens today, to supply the souvenir shops with semi-worked materials (“” – H_{175}). Currently, the Hutsuls use local materials (river rocks, wood) for building their houses, burn wood for heating (which is a renewable resource), and decorate the interior of their homes with stitched organic fabrics, as well as wood, horn or bone carvings.

Many domestic activities are accomplished by local cooperation, the so-called *clacă* [collective work]; however, their approach is less practiced than in the past.

Figure 3. Loom in a Hutsul household used for folk costumes pieces. Photo: Matei Elena, 2016



The Hutsul gastronomy is based on common food products obtained in one's household or gathered from the woods, generally rich in calories, to support the intense physical effort and the climatic stress (Table 1). Three staple food items govern their gastronomy; namely, meat, milk and potato. Their preference for potato, which is an important feed for pigs, is often invoked by the Hutsuls when they describe the interethnic verbal tensions (*"Many times we are called pigs"*, H₁₅₇). However, life expectancy is similar to the rest of the people living in the mountain areas.

The Hutsuls' spiritual culture encompasses countless traditions and customs connected with the Christian holidays and the main events of the human life cycle, all of them strongly related to the natural elements of the belief system. Hutsul people came and remained orthodox. They belong to Christian Orthodox Church and strictly observe the holidays according to the Old Style (the villages along the Moldova Valley with services in Slavonian) or to the New Style since the "great schism" (1924), which brought a shift from earlier 13 days in the calendar of religious events (Irimie 2014) and services in Romanian (the villages along the Moldovița Valley). Some

spiritual practices, although akin to the Romanian ones, are considered by the interviewees to be specific for this ethnic group. Their preservation in church and in the family is an element of ethnic sustainability and identity.

Table 1. Hutsuls' specific dishes

No.	Name*	Explanation
1	<i>Bujiniŧea</i>	Meat (smoked on the premises) with beans or pickled cabbage
2	<i>Culeŧa barabulina</i>	Potato polenta
3	<i>Huslinka</i>	Mixed sour milk (sheep and cow)
4	<i>Ieŧniŧea</i>	Scrambled eggs, cracklings of pork fat and cream
5	<i>Rosău �s capustii</i>	Sauerkraut juice with polenta (eaten during the fast)
6	<i>Povedlo</i>	Jam
7	<i>P�eneŧia vareana</i>	Boiled wheat
8	<i>�u�ene�ii �s iabluc</i>	Dry apple slices

* Dish names are phonetically transcribed in the Romanian language

Sustainability and Identity in the Spiritual, Social and Cultural Life

Christmas is an important holiday for the Hutsul community. The preparations begin on Saint Ignatius day when people sacrifice the pigs raised in their households and make up the Hutsul *chi ca* [pig intestines stuffed with pork meat mixed with basil and corn flour]. On Christmas Eve, Hutsuls keep a total fast until sunset. They do not get annoyed, do not get angry, do not raise their voice and do not engage in evil actions (H_{m57}). On the same occasion, they organise a special feast, with twelve fasting food items intimating the twelve months of the year and the Twelve Apostles. The feast is made up of servings of canned or dry mushroom stew or salad, rolled cabbage, boiled wheat with nuts, beans, peas, potato salad, pickled cabbage salad with onion and oil, rice, cheese pancakes, corn flour, dumplings, dry fruits cooked in syrup. All these foodstuffs are served in clay or wooden dishes. They are placed on a table on which people have previously placed a bunch of grass sprinkled with cloves of garlic, tied with a red thread in the sign of the cross for protecting the house against the evil spirits (H_{f57} , H_{f64} , and H_{f21}). On top of it, they lay out a tablecloth made of linen or hemp. Usually, the food is blessed by the parish priest (Romanian or Hutsul, in

Romanian or Slavonian), who also blesses the believers' homes on Christmas Eve.

The houses are spread all over the place and it sometimes happens that the priest cannot reach all of them by sunset. In this case, the family members eat while being seated on benches, lest the cattle deliver their offsprings while standing. The master of the house, usually the husband, puts on another plate a little bit of each dish, then goes out and calls the wild animals to fast together with him, or else to refrain the next year from destroying the crops and the lands, as well as the flocks and herds (H_{f75}, H_{m80}). Although the interviewed Hutsuls stated that they still observed all these Christian ceremonial steps, other people thought differently (*"along the Moldovița Valley, many people have embraced modern customs; only few families still preserve the traditions"* – R_{m56}).

Upon completion of this ceremonial, people wait for the carolers. The community still preserves the custom of Religious Carols. Consequently, the male chorus of the local church goes to the people's households accompanied by a fiddler and by an artistic leader, the latter carrying the holy cross that he has received from the priest. The hosts reward the carolers with money, sausages, bacon, cereals and ringbread, while around the cross they place a towel of great artistic value, weaved or embroidered previously on homespun. It is common for the parish priest to confess and communicate the church choristers before going caroling door-to-door in the village. When they finish caroling, which can last until Epiphany, all things collected are divided among the carolers, in the presence of the priest, who receives part of the money, which he uses for the church needs (R_{m56}).

Herods tradition, a folk and religious form of drama, which is practiced by young people between Christmas and Epiphany is rather similar as that practiced by other Romanians and Europeans. The script is written by the priests or is transmitted orally from generation to generation.

On Christmas Eve, people perform the *Plugușorul* [agrarian carol; = small plow] which, unlike the Romanian version, is sung not spoken. On St. Basil day, children go from door to door with *Pșenița* [seeding custom] and *Sorcova* [a kind of folk spell], in the first case reciting the verses while going around the house and in the second while staying inside and facing the religious icons. The master of the house collects the wheat spread by the children and mixes it with the one that is to be sown the next spring to enjoy the reach crops.

On Epiphany's Eve, the villagers raise an ice cross near a spring or on the bank of a river crossing the settlement or in the churchyard. That same day, the priests go once again to the people's houses for offering blessings. On Epiphany day, the priest consecrates the river water, the ice cross and the wood vessels containing water by sinking in them basil and a wooden cross, brought in by the believers. After the service, the wells, the animals, the houses and the household annexes are sprinkled with holy water, while the cross is placed above the entrance door for protection. In fact, many Hutsuls celebrate the winter holidays longer than other people because those living in the South observe the New Style calendar and tend to visit their relatives in the north, who celebrate according to the Old Style calendar (R_{m56}).

During the St. George feast, people use to lay small turfs with yellow flowers () on the posts of the gates. Women are strongly influenced by superstitions, claiming that this practice wards off the evil spirits, charms, spells or curses that may befall people and households.

On Palm Sunday, believers go to church with sheaves of willow or birch catkins, which the priest then consecrates. When people return home, these are used for adorning the houses and the animal sheds to attract health and fertility.

The respect for the memory of the deceased can be seen in the first Saturday of the Lent, the so-called *Sorocousti* [Commemoration Day of the Dead], which is the last commemoration event of the Lent. On this occasion, people burn the vegetal residues and the wastes have resulted from the spring-cleaning of their households, which in their opinion will " , a world called . Apart from the religious significance, this practice helps the environment regain its vitality. While the residues burn, children jump through the smoke for purifying their body and soul in preparation for the Night of Resurrection.

On the Night of Resurrection, the Hutsuls go to church to attend a special service at the end of which the priest consecrates the foodbaskets prepared by the housewives and containing salt, garlic, butter, Easter painted eggs, bacon, Easter bread, plain bread and a braided candle. Forty days from the Easter, the Hutsuls, like all orthodox people, celebrate the Ascension, a feast known as *Ispas* (considered to be a witness of Jesus's ascension to Heaven), the Day of the Heroes, the Day of the Dead or Horse Easter. Here, the horses are fed with fine food over the course of an hour and afterwards are left loose for the remainder of the day.

The Pentecost feast (Great Sunday or Pentecost Sunday), which the Hutsul minority calls *Svita Nedilia* [Holy Sunday] is celebrated with folk magical practices combined with religious elements. *Rusaliile* [Pentecost creatures] are supernatural beings embodied in evil old women, who are turned into ugly witches singing and dancing in the air, near the wells, on the hills or in the glades over the week before the Great Sunday. The tradition includes a three-day rest (Sunday, Monday and Tuesday) because it is believed that those who work in these days will be crippled or blinded. Thus, to safeguard their households, people place green twigs of lime, birch or beech on gateposts, on house's walls, as well as on barns and stables, which they will throw on fire during storms or whenever are threatened by other natural elements.

[Yellow Bedstraws], the holiday when Hutsuls celebrate the Birth of St. John the Baptist, which is also called [Floral John], is celebrated on 24th June, according to the present calendar, or 7th July, according to the old-style calendar. For Hutsuls, this day marks the end of hoeing works, the beginning of haymaking and the ripening of many medicinal herbs. The Yellow Bedstraws () gathered in bunches acquire magical connotations with different meanings. The girls tie them at the belt for their miraculous powers, lay them beneath the pillows the night before the feast hoping to dream the lads doomed to be their husbands, then throw the bunches on the roof to foresee their fate. Tradition says that if the bunch rests on the roof, then the respective girl will have a long and abundant life, but if it falls to the ground, she will experience a shorter and harder life. In the morning, people use to gather medicinal herbs, which are then brought to the church to be consecrated, thus acquiring healing powers.

Hutsuls are dominated by superstitions. The antidotes for preventing the occurrence of unwanted events are religious prayers, incantations and some other practices strictly observed so far. Thus, in summer, they have many more holidays than the Romanians: Saints Cosma and Damian on July 1; Saint Procopie, on July 8; and *Pontilia* [Saint Pantelimon], on 28th July. Most of these superstitions are related to climatic and meteorological events and rely on the behaviour of some local fauna species (table 2:1-4).

Some people even admit the existence of black magic practices. The belief in demons and evil spirits is less frequent. However, women (Marian-Bălașa 2013) create charms meant to stop the cows from giving milk ("", H₁₅₇, H₁₆₂), cast curses, undo spells and use occult means to find their enemy,

destroy his belongings or enhance their own fortunes. People also mention the use of various kinds of incantations meant to fight *deochiul* [the evil eye], *rujia* [rosacea] or *mana vacii* [cow's incapacity of giving milk].

Table 2. The Hutsuls' superstitions and rituals

Name	Period	Action/behaviour	Expected effects
1.Green thursdays	From the Holy Thursday, the last Thursday in the Lent, until the holiday.	People are forbidden to work the land.	Hail will not fall, people will be safe from storms, floods and other disasters that might ruin their crops.
2. [Transfiguration of Christ]	August	Storks gather in flocks and fly away. Storks linger around and rotate for a few days.	Fall will be short and the winter will be long and harsh. Winter will be short and milder.
3.Winter forecast	Summer-Fall	Corn cob is covered with several layers of husk.	Winter will be long and hard.
4.Winter forecast	Fall	Birds nest on top of the haystacks.	Winter will be hard.
5.Family difficulties	Whenever necessary	The head of the family worships the four corners of the chamber	Help from the protective divinities of the house.
6.Deceased persons	Christmas, Easter	Fill a glass with water and a plate with fasting food or sugar.	Nourish the deceased who return home.
7.Larch plantation	Fall, Spring	Denial	Leads to family breakup.
8.Yew wood nails	Christmas and Easter	Wood nails are driven into the house foundation.	Casts out evil spirits.

i) Incantation for rujia [rosacea]

„Oi te rujia, ni buchi dujia, ni palai, ni focai, ni jile, ni vile, searțea radischi ni vidberai, projeannoii, moletveannoii Catrinii (the name of the person) scizai, propadaî, scizne, propade. Pobilii ec craida, pociornii ec papir, prișlăis îs lisa, ide u lis, prișlăis îs polia ide u poli, prișlăis na sleana, ide na toho holu șo ti

pâslau. Ia tebea deviechimea vohniame jeveme vidpaliu, ni sama soboiu, is Hospodom Svitem, is Matcou Hrestoiu, is Troițou nebeasnu.

Ikei hâski priișou Takei colaci naișou / (repeat three times)

Ptiu! Șcizai propadai!” / (repeat three times)

„”/“Oh, *rujia* [rosacea], do not be strong, do not spread, do not hurt me, do not take away the joy from the faithful Catrina (the name of the person), go away and break your neck. Get chalk-white, black as burned paper, go away and disappear like foam on the water, like dew on the grass, you’ve come from the wood, go back to the wood, you’ve come from the field, go back to the field, you’ve been sent by someone, go back to your sender. I burn you with nine living flames, not alone, but together with the Holy God, the Mother of God and the Holy Cross.

Whatever disease has come, such ringbread has found (repeat three times)

Ptiu! Perish from me!” (repeat three times)

ii) Incantation for mana vacii [cow’s incapacity of giving milk]

„Pșica nenea, Pșica nenea. Ni na vașe imne, na vașu jetnischi setnia moloco, toustu smetanu, joutea maslo, joutea ec vâsc, zapașnea ec vaselio, solodchea ec mid, is lisâu, is rosâu, is pșianeții, is seroi zemneții șo vâd Boha naimenovano, vâd gazde, gazdenii zamenovano. Macovea zearno na cetvero rubaiu svoie ni puscaiu, ciujea ni chivaiu.

Ike hâski priișou Takei colaci naișou (se repeat three times)

Ptiu! Șcizai propadai!” (repeat three times)

“Pșica nenea, Pșica nenea (words used for calling the cow). It’s not on your name, on your life, fat milk, fat sour cream, butter, as yellow as wax, smelling like basil, as aweet as honey in the woods, made from water, rye, wheat and crude earth, given by God, and offered by the householder and housewife. I split the poppy seed in two, what is mine I don’t give up, I take nothing from the others.

Whatever disease has come, such ringbread has found (repeat three times)

Ptiu! Perish from me!” (repeat three times)

These feared evils can be banished by a belief in God, by wearing a cross, by sprinkling the face with holy water, by carrying an amulette secretly or

by using garlic. Even though believing in superstitions is in contradiction with orthodox religion, local priests see them as traditions and do not try to change people's perception about their way of life (*"I believe this is the house's custom. I do nothing, because I might alienate them from the church"*, R_{m56}).

The most important moments in the Hutsul's life are the same as those of the Romanians: birth, wedding and death. Wedding is the result of the family talks regarding the most suitable partner (*"Father decided whom to marry"*, H_{f64}). In the past, when a lad was convinced that the girl he courted was a good homemaker, he would send a man of honour "to go for the word", that is to ask her parents for permission to marry their daughter. As soon as the girl accepted the proposal, the families made the arrangements for the engagement ceremony, which took place either on a Saturday or on a day of celebration. On this occasion, the parents of the young people who were to marry discussed the dowry and established the house where the wedded pair would live (in case the lad did not already have one), as well as making an individual contribution to the wedding expenses.

In the end, the bridegroom's relatives supplied the drink, while the hosts laid the food on the table and the party began. In the past, but not so frequently today, the bridegrooms wore the Hutsul traditional costume, specially made for the event. The bride was wearing the wedding Cordalys garland with coloured ribbons. The grooms's wedding shirt was hand-sewn previously by the bride. The groom would come to his bride's house on the back of a horse adorned with coloured ribbons and having fir twig garlands around its neck. He was accompanied by *druște* [maids of honor] and *vătăjei* [best men]. From the canvas supplied by the bride, *druștele* [the maids of honor] sewed *năfrămi* [kerchiefs], which they offered as a token of reward to the *vătăjei* [best men] who accompanied them to the wedding.

Even today, the bride's house is the scene of a series of customs marking the separation from family home and the forgiveness and blessing of the parents. The gates of the wedded couple's houses are adorned with small fir trees, 60-70 cm tall, of which hang coloured ribbons, because for the Hutsuls the fir tree is the symbol of power, longevity and wealth. In case the bride was from a neighboring village, groups of unmarried young people would block the road to the church with fir branches or logs, asking the groom to give them drink in exchange for clearing the way and let them pass. Nowadays, this custom called *brama* [the gate] is either extinct or extremely rare.

The funeral ceremonies recall Dacian traditions (Grumezea 2009) because, apart of the orthodox religious customs, the atmosphere is dominated by happy moments (José Blanco and Vidal 2015) in accordance with the age of the deceased person, except for the young. If the deceased was an old man for whom death was a natural event, young people and children would lighten the moods with all kind of games (*ciușca* or *bâza* [slapping game] and *lapte gros* [a game in which people jump on the other people's backs]). Likewise, they used to play costumed skits or to make jokes, which were meant to chase away the evil spirits and to ease the relatives' pain. The deceased made his or her last journey to the church and then to the cemetery in a cart pulled by oxen or horses having four fir trees at its corners.

Birth and christening are not different from the orthodox Romanian customs.

Folk ethos is preserved in songs and legends, which are passed to the descendents in an informal way because “*șezătorile* [villagers' gatherings] *no longer occur*” (H_{m64}), or through the agency of local bands (R_{m44} , H_{m24}). The songs are assumed by the young people, who disseminate them through various cultural activities (H_{f18}). The same is done by those adults and elders who are members of the folk groups supported by their local or regional authorities (Fig. 4).

Figure 4. Youth Day in Paltinu Village, 2015 (Photo: Priest Coca Hancea Victor)



An interesting and sustainable initiative was found in the Modovița Commune, where the local priests have established the Youth Day, celebrated on the first day after Easter, when all the Hutsuls are invited to a complex religious and cultural show staged by young people dressed in folk costumes (*"This is a good opportunity for making friends and for closing relationships that will usually last for the whole life"*, H_{m56}).

All interviewees were proud of their Hutsul identity, even though confusions sometimes occur, as people think they are Ukrainians. These confusions arise from the fact that lately they have been involved in cultural exchanges under the umbrella of the the Association of the Ukrainians in Romania. This information is at odds with the Romanian education system, according to which these people learn the Ukrainian language as a discipline from their first class in primary education until the twelve grades, as this language has different words and accents. There is a concern regarding assimilation with the Ukrainian in the context that they agree the language is oral, *"a mixture of Polish, Ukrainian, Romanian, even German and Hungarian words"* (H₁₇₅) without writing rules, being aware that their spiritual and cultural customs are unique. There are even monographies about this community, written in Romanian, or in Ukrainian to be promoted in both countries. Several initiatives of natives to establish a written form of Hutsuls language based on Latin alphabet generating online dictionaries, poetries, jokes, legends etc. Moreover, no-one has expressed the desire to become a nation like the other small nations in the European Union (Ross 2011).

The identity of the Hutsul ethnic group, assessed by monitoring the endogenous and exogenous perception have revealed the importance of the online environment in defining the ethnocultural characteristics of this minority, established since ancient times in the northern part of Romania.

The comments collected from the web (online media and social-media) have the following composition: 35.3% belong to the Hutsul ethnics (endogenous perception) and the rest of 64.7% to the Romanian ones. We accessed 35 web-sites with references to the Hutsul race, but comments on this subject were found only in seven of them¹ which is a confirmation of the

¹ <http://www.natgeo.ro>; <http://www.ziarulstefancelmare.ro>; <http://adevarul.ro>; <http://flaviusobead.wordpress.com>; <https://video.monitorulsv.ro>; <http://ioncoja.ro>; <http://www.gandul.info>

fact that these people are little known to the Romanian population. At the same time, the people belonging to this minority have a low contribution in promoting their origins and customs or their way of life in general.

As far as the ethnicity of Hutsul are concerned, they make comments on the origins of the ethnocultural group they belong to, on their way of life, and on their relationship with the Romanians or with other ethnic groups. Some of them consider themselves to be an “*ethnicity of Slavicized northern Dacians*”, but others think the “*Hutsuls speak a different Slavic language, akin to the Ukrainian one*”.

Casian Balabaşciuc (2006) is often cited by the media, because he said, “*Hutsuls are the orphan children of history*” because, like the Dacians, they are not aware of their origins. In his opinion, another similitude between these two ethnic groups is the lack of a written history, showing his fear, doubt about the security of “*preserving their identity and the memory of their ancestors or for cultivating their origins*”. The same author considers the ethnic group of which he belongs as being weak; not economically, but in a cultural and spiritual sense, because it lacks the capacity to preserve its own identity on a long term.

In the field, however, people think that Hutuls are a strong group with a clear identity and that they are favoured by legislation. Moreover, they have many rights supporting personal development and the progress of their community (H_{f18} , H_{m18}).

A representative of the Hutsuls have emphasised the communication and the relational skills of these people, which are tolerant of other ethnic groups. Likewise, they are somehow resigned and this fact is suggested by the comments of one of the interviewed subjects on the assimilation tendencies that have culminated with their total assimilation by the Romanians or Ukrainians: “*I believe that when my son introduces himself by saying ‘I am a Hutsul, a member of a race threatened with extinction’ he actually says everything*”. This explains the call released in the virtual environment to support the Hutsuls, a people on the verge of extinction, to preserve their language and culture.

Despite our findings in the field that traditions are preserved, people deem that several ancestral customs are abandoned. This happens, for instance, with religious practices which have been replaced by newer ones, borrowed from the Romanians (the Slavic religious service has been replaced by the Romanian one).

We should emphasise that exogenous opinions are much more numerous than the endogeneous ones. It is worth highlighting the fact that many Romanian ethnics sympathise with the Hutsuls, appreciating their attitude, traditions and folk costumes (*"The Hutsuls are wise and reliable. Romanians have learned a lot from them"; "The Hutsuls really deserve more attention"; "They are lively people who love their community, their games and traditions, as well as their tales with stray souls"*). People generally fear that the globalisation phenomenon will erase their ethnic identity.

The exogenous comments are full of appreciative comments, people considering that Hutsul ethnicity has a lot to show to the world, but the people who can turn to accounting for the customs and artistic achievements of this community are rare.

Some argue that this ethnic group is confronted with an identity crisis and that the main cause for this reality is the *globalisation* phenomenon and the fracture that exists between *the contemporary people and the former free people* of the forest. These two causes are at odds with the right of every human being entitled to freedom, development and high living standards.

Unfortunately, we have also identified hostile attitudes towards the Hutsuls (although not so many), consisting in ironies, opposition to their ethnocultural affirmation or invitations to exhibit their customs and language in the Slavic countries.

Threats and solutions

In Romania, Hutsuls are not an ethnic group largely known to people, excepting those with higher education or interested in folk, science and tourism in this area. They are often lumped in with the Ukraine minority of Romania and never with Poles or Ruthenian from nearby region. In Suceava county they are both recognised and appreciated, largely perceived as being concentrated in northern area on Suceava Valley where the villages toponimy sounds typically hutsuly (Brodina-Ehriște, Zalomestra, Cununschi, Dubiușca; Ulma-Lupcina), then in Moldovița Valley (Demăcușa, Rașca, Argel and Paltinu, Ciumârna) and upper Moldova (Modova Sulița, Breaza), and a few in the Southern part (R_{m64} , R_{f45} , H_{m60}). Their number seems to be in regression both spatially from north to south of Bucovina and temporally due to the mix family with Romanians and youth migration in Europe after 1990.

Despite the opinions regarding good relations among Romanians and Hutsuls as the biggest minority of these villages, in schools, families, there have been several complaints about disrespect recorded downstream of the Modovița Valley. This lead us to conclude that there is a fear on the part young people who, at first discussion, do not recognise affiliation, except when they feel interest about their origins become communicative and pride in their ethnicity. People are afraid about their future as the members of the survey sample expressed their concern for the loss of traditional costumes, language, wood processing techniques and the traditions concerning the winter holidays. What menaces the Hutsul community from this point of view are the migration of the labour force and the invasion of the cheaper goods, which are not the result of their skilled work. At present, there are no workshops or households remaining to preserve the art of sowing and weaving the traditional costumes.

Carpentry, like weaving, is now practiced by only a few elderly people. The invasion of allochthonous products has brought about changes that have affected both the craft and the way the people decorate their homes. At the same time, under the influence of those who went abroad, while the fashion in house architecture has changed. The old houses where the elder families live are the only ones that preserve the Hutsul elements, while the traditional objects are either disposed of or preserved by the family members who, unfortunately, neither use them nor put them in sight.

However, people are optimistic about the songs, the dances and the egg painting techniques. These are disseminated through local programs, music bands, local or regional museums (Suceava, Bucharest) and Hutsul festivals held in Ukraine and Romania.

Valorification through business is still weak. The Easter painted eggs are most profitable which have become a source of income for few families. The horse breeding center in Lupcina represents a milestone for preserving Hutsul race (H_{m45}), falling with few guesthouses in promoting tourism to this ethnic group and with Mocănița (narrow gauge train) the Hutsulca on Modovița valley. In fact, their position in the tourist region of Bucovina monasteries with medieval fresco painted exterior could be beneficial and not ccompetitive.

Moreover, in linking with cultural heritage of highlanders promoted in Carpathians or through their involvment in Via Carpathia, Romania could help in the creation of a cross-border nature park designed to preserve and

exploit this fabulous potential inline with EU policy for multiculturalism. Such involvement may diminish the perception at this time, owing to a lack of awareness of the fact that tourism could help them preserve their traditions and enhance community revenues.

Conclusions

As the subject of this study, the Hutsul ethnic group of the South Bukovina province Romania is a part of highlanders in Carpathians area crossborder to Ukraine, spread in ten communes from Suceava county. Its number is unknown, being included in Ukrainian minority group in Romania, but generally it is perceived to suffer a regression due to mixed families and youth migration presenting a unique and still unsolved history. This group has had contacts with different people and its cross-history besides Ukraine and Poland or later under the influence of the Austrian-Hungarian Empire and then dwelling on the Romanian territory. It has suffered acculturation phenomena, acquiring a unique language which has raised many controversies. These influences are also mirrored by the traditional costume and by their ethos. At the same time, historic difficulties and the elements of the environment explain their feelings related to superstitions, the melodic lines or the sad lyrics. However, their persistence in this mountain area has created a strong connection with nature, which is mirrored by their occupations, by their architecture and by their everyday life. The households have always observed empirical sustainable principles, which are now officially promoted by the European and the national economic, social and public policies.

In local perception both Hutsuls and Romanians recognised their unicity regarding some agricultural practices, food, wood processing, folk costume, songs and poetry, and several religious habits which must be preserved. On age groups, perceptions are contradictory. The elders are more conservative and slightly hostile against the changes brought after 1990, which encouraged migration of the labour force and the invasion of the cheaper goods, which compete with the traditional ones. On the other hand, young people are more open to the integration of the new realities in contemporary Hutsul society. Thus, they militate for finding appropriate solutions for turning to account the Hutsuls' traditional values through cultural events and tourist infrastructures

(museums, workshops, etc.); in other words, initiatives that may ensure the promotion and sustainability of the Hutsul ethnics in Bukovina.

But, at the moment, we agree that “ongoing acquisition of new political, socio-cultural and economic models of life”, in Hutsuls societies and those resembling them, including neighbourhoods “there can be observed a regression of tradition, customs and norms for the last decades” (Bucher and Nováková 2015). In this respect, the Hutsuls of South Bukovina should be assisted by local, national and regional authorities to solve all the controversial challenges facing them: in preservation of their traditions, including language and to adapt; approving new youth trends regarding education; and modernisation through more actions inside and within the transboundary area. Beyond the necessary cultural exchanges, they need to find economic approaches that persist in the long term, one of these being an emphasis on tourism which can have many benefits in all aspects of life.

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Surveying the Importance of Population and its Demographic Profile, Responsible for the Evolution of the Natura 2000 Sites of Bihor County, Romania

Abstract

The current study focuses on the demographic profile research of Nature 2000 sites belonging to 28 administrative entities located in Bihor County, in northwestern Romania. For the purposes of this study, out of the 74 local administrative units (LAUs) holding protected areas of the type Nature 2000 while only sites that cover over 40% of the administrative entities' area were taken into account. Starting from the interrelation of the contact between human communities and local ecosystems, the research sought to determine the interdependence level between the local residents' lifestyle and the biodiversity-related maintenance/preservation of these protected areas.

Based on the referenced statistics, more demographic indicators were calculated (population decrement, population density, structure by age, dependency index, active population and structure by industry) and basic indicators of pressure on the environment (naturalness index, human pressure through land use and forest area per capita). Each of these factors are meant to reveal how man cohabitates with nature in a balanced or disrupted manner according to the study results. Thus, considering the 28 LAUs from case to case, areas where environmental health tends to insecurity were identified, but there are cases in which it is

satisfactory thanks to the existence of massive woodlands over wide areas, while also being due to a considerable demographic decrement.

Key words: population, Nature 2000 Sites, LAUs, demographic indexes, indexes of pressure on the environment

Introduction

With regard to the *Nature 2000 ecological network*, studies and research have been developed to a large extent, standing out from those with an empirical load or thematically related to the protected environments of the Romanian territory (Ioja et al. 2010; Bodesmo et al. 2012; Hoyos et al. 2012; Pietrzyk-Kaszyńska et al. 2012; Marandi et al. 2014; Jones et al. 2015; Dupont et al. 2016). The specialised Romanian literature emphasises that, in 2010, over 96% of the new protected areas (Nature 2000 sites) were already overlapping the existing protected areas (nature reserves, monuments of nature, nature or national parks), although there are certain difficulties for the featuring of the phyto or zoological elements (Ioja et al. 2010).

A serious concern is raised about *the thin line which is difficult to trace* between what is natural and what belongs to society. However, the choice of conserving certain environments gives precedence to the man-environment relationship (Cenar 2009). It is also expressed by the ecological value and economic costs (Ando & Getzner 2006), where protected areas are often *owned or managed by private actors* (Young et al. 2013). They are also interested about *land prices*; namely, the agricultural land within protected natural areas, an interest in which is attributed to pressure from densely populated urban areas located near protected areas (Abelairas-Etxebarria & Astorkiza 2012).

The existing literature cites four principal approaches to the complex relationships between residents and protected areas: access to resources; demographic changes; the attitudes manifested by local communities; and communities and stakeholders' involvement.

Access to resources is fundamental to the lives people lead from within a protected area. Studies from the specialist literature refer to *agricultural and non-agricultural resources (environment-related)*. They admit that many trigger poverty for rural communities in the vicinity of a protected area (as

in the case of Tanzania), including damage caused by wildlife (Vedeld 2012). In Europe, extensive farming has proved to be essential for the maintenance and encouragement of biodiversity in protected areas (France – Dupont et al. 2016), but negative effects have also been reported, such as underground mining affecting a swamp of an Estonian protected site (Marandi et al. 2014).

We need to admit the fact that the *use of mineral agricultural or forestry resources* by residents or entrepreneurs in a protected area inevitably afflicts its biodiversity and ecology. On the other hand, there are results which indicate *a loss of control of local rural population* over natural resources, as in the case of Austria. Here, gogovernance initiatives have been set in place through the negotiation of international or local regulations to meet their land use needs (Penker 2009). In Romania, declaring the Nature 2000 protected areas in an „emergency” regime (certain criteria had to be met for the accession to the EU) has led to restrictions and prohibitions on territory use and its related resources (Primack et al. 2008). As a consequence, gaps concerning a clear-cut territorial delineation of these protected areas have favoured a massive anthropogenic intervention by logging, the extraction of useful minerals and development of tourist infrastructure (Ioja et al. 2015).

Bihor county, lying within the Nature 2000 protected areas, contains a wide range of resources, including forestry, arable land, thermal waters and underground resources of prime importance, with the welfare of local communities being closely related to their exploitation. An important set of information is revealed by studies about the *attitudes manifested; an exploration of environmental psychology* of human individuals versus *protected environments*, there being an obvious, direct correlation with access to resources.

Following this trend, the protected areas of the Natura 2000 network include the Spanish and Basque community (Hoyos et al. 2015) as well as the Polish one (Pietrzyk-Kaszyńska et al. 2012; Chmielewski & Głogowska 2015), alongside the Romanian one (website 4). For example, protected areas are indicated as areas contested by small farmers or Ethiopian shepherds, challenging the boundaries of a national park, land use and the involvement of local people in the act of good management (Kelboro and Stellmacher 2015). Most often, the contact between locals and restrictions of a protected area often go hand in hand with conflict triggered by the establishment of protected areas as a point of resistance and conflict practices, but also as a driver of *sustainable practices officialisation* (Pieraccini and Cardwell 2016).

The attitudes and awareness of Nepalese villagers at the edge of a protected area are also interesting; namely, the protected statute of a *varan* species, as children are more responsible for species conservation than adults (Ghimire et al. 2014). Certain documented studies shed light on *conflict resolution* that refer to biodiversity conservation. Between landowners wishing to exploit certain natural resources of protected areas and managers of these protected areas, solid and trustworthy relationships can be built with patience (Cigna 2001; Young et al. 2016). Furthermore, land use even draws upon judicial models as a *reasonable compromise* for the management of protected areas, as in the case of the Phillipines (Verburg 2006).

Bihor County also subscribes to the above model, mainly referring to the conflict which arises because the diminishing access to resources (especially to timber from forests, but also for changing the purpose of certain land use categories) translates into the stubbornness of some local communities who struggle openly and angrily (website 5) with the administrators or custodians of protected areas. Thus, a Nimby syndrome (Not In My Backyard) may be identified.

Another set of studies that interests the format of this article refers to the **demographic changes**, referring to the key factors responsible for the loss of biodiversity in a protected area. Biodiversity loss due to the residents' potential impact from terrestrial ecoregions for preservation is very important. On this occasion *population growth and high-density rates* are signaled in such protected territories, as well as a *decrease in fertility*, followed by a *change in the population age pattern*; namely, a shift from a predominantly young population to more aged individuals (Cincotta et al. 2000; Williams 2013).

In some other situations, studies have referred to a population living inside the protected area or its vicinity focus on the phenomenon of migration. This is how some researchers explain the high increment to tens of thousands of households and population density of up to 1.5 times higher than in more distant places of a protected area in western Uganda (Hartter et al. 2015).

Human population density in South African national parks is treated in terms of its *predictor* quality for the invasive species having a negative impact on biodiversity (Spear et al. 2013). The demographic analysis is also used to weight the load a population carries by exerting pressure on the biodiversity of certain habitats that require protection (Cirtina & Gamaneci 2015), so setting up tailored policies to preserve species. This approach is also relevant for the socio-demographic changes related to the land use in the vicinity or

inside the protected areas (Hoyos et al. 2012). In relation to Bihor County, demographic mutations seem favourable to the sustainability of Nature 2000-sites, especially by the demographic pressure decrease.

There are thorough statements about *the involvement of the community and all stakeholders* in the management of Nature 2000 sites (Apostolopoulou et al. 2012; Young et al. 2013), meaning that residents agree to various forms of *participatory and collaborative management* (Dimitrakopoulos et al. 2010) and social factors that influence such a decision (Jones et al. 2015). *Not knowing the needs of people* living in protected areas or near them, the imposition of specific land use models by management plans, are less accepted by the same community as in the case of a national park in southern Ethiopia (Kelboro & Stellmacher 2015). It has been shown that there is correspondence between the *growth and wellbeing* of Andalusian localities and the fact that the latter belong to protected areas for many years (Bonet-García et al. 2015).

The topic about *low deforestation rate* has also been analysed in relation to the occupation of protected areas and indigenous territories compared to other lands in Panama (Vergara-Asenjo & Potvin 2014). In protected areas, a sustainable activity is performed, but studies found a situation of *poor efficacy in reducing poverty*, especially for residents of the protected areas or close to them (Miranda et al. 2016).

To meet the goals of this study, only related references were selected synthetically, those which pinpoint the research directions and supported the current results. The demographic analysis was mainly pinpointed by the research of Cincotta et al. (2000) and Williams (2013), using the qualitative analysis model for protected areas concerning the growth, density, fertility rates and the age structure of the population. For the part of the study which combines conservation with development aspirations of the population from protected areas, Adams et al.'s (2004) model was used, which aims to achieve results that can control, reduce and even eradicate locals' poverty from within or nearby the protected areas.

Aim of the Study

The study refers to the Natura 2000 sites of Bihor County, focusing on a sequence of the human communities and local ecosystems interdependency so as to register the viability of the protected areas' system (mainly the

maintenance of the ecological diversity). To meet the goals of the study we proceeded to analyse certain significant demographical indicators which can prompt the exertion of the human pressure on the environment. This is due to the fact that among local communities who live within or in the close vicinity of the Natura 2000 sites, there is a certain mistrust of their viability and cooperation willingness for their proper functioning.

In this study, we aim to make an assessment of the demographic profile of the LAUs comprising the Natura 2000 sites and determine some pressure indexes which humans exert over the environment/landscape of the protected areas.

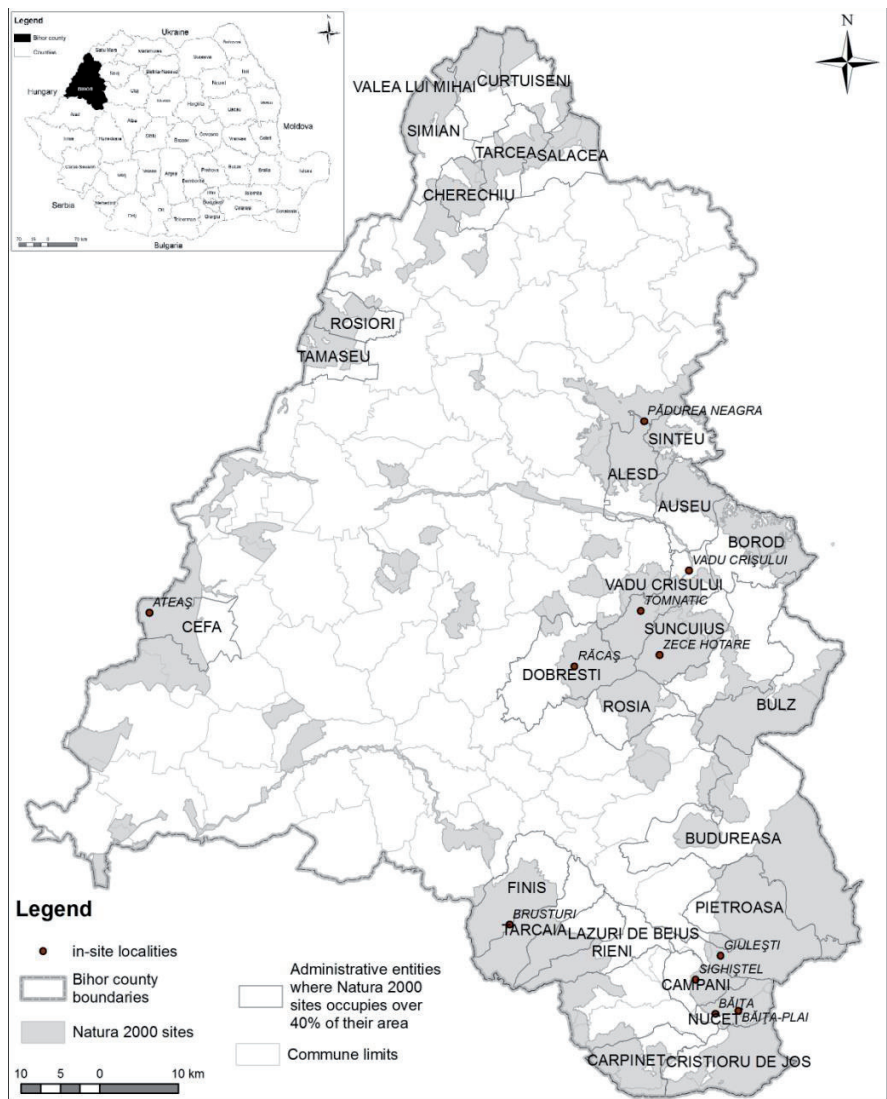
Area of Study

The current analysis has targeted the protected areas of Bihor County in north-western Romania (Fig. 1). In Bihor County, protected areas are spread over 30,867 ha, which accounts for over 4% of the entire area of Bihor (7,544 sqkm) county. Within the protected areas layout, 37 Natura 2000 sites are spread out over 74 local administrative units (LAUs) (Fig. 1, Table I). The human settlement network of the LAUs analysed comprises 113 localities of which 11 localities are in-built area within the protected area perimeter such as: *Ateaş* (Cefa commune), *Băiţa* and *Băiţa Plai* (Nucet city), *Brusturi* (Finiş commune), *Giuleşti* (Pietroasa commune), *Pădurea Neagră* (Aleşd city), *Răcaş* (Dobreşti commune), *Sighiştel* (Câmpani commune), *Tomnatic* and *Vadu Crişului* (Vadu Crişului commune) and *Zece Hotare* (Şuncuiuş commune).

Table 1. The share of occupied areas of Nature 2000 sites in the LAUs of Bihor

Percentage (%)	over 40	between 10,1 – 40	below 10	without sites	Total LAUs
The number of LAUs	28	26	20	27	101

Figure 1. Nature 2000 sites of Bihor county. In the upper left corner – location of Bihor county at the level of Romania



Methodology

The Natura 2000 network was implemented in Romania along with the pre-adhesion process to the EU to obtain reference data, while the demographic profile analysis was elaborated based on population census statistical data and the file of the locality (DJS – Bihor). Thus, the numerical evolution has been followed during 1992-2011, but for the other demography indexes we mainly refer to the last census of Romania (2011). The limits and areas of the Natura 2000 sites are taken over from the database of the Ministry of the Environment, Waters and Forestry (website 2) and cartography is made in ARCGIS. To determine the naturality index we start from the precept: low human pressure – increased biodiversity (French methodology, website 1), but a simple calculation formula was used which takes into consideration the forested area of a referential unit (in our case the LAUs) ($I.N. = \text{Forest area} / \text{Total area}$).

Within this scope, from the category of the protected areas of Bihor county we took into account the Natura 2000 sites (represented by the SCI –sites of community importance and APS-avifauna protection sites) which hold at least 40% of its area at the level of the LAU. We deem that the value of 40% is enough for human pressure to trigger visible environmentally-related outcomes. Thus, out of the 74 LAUs which overlap these protected areas, 28 administrative entities were identified, which cover 40% of the Natura 2000 sites (Table I) and which constitute the main aim of the study. Three of them are cities (Aleşd, Nucet, Valea lui Mihai), and the remaining part belong to the rural milieu. For instance, in the Şuncuiuş commune, the protected area holds 85.2% of its surface, while in Pietroasa commune it holds 84.5% and in the Vadu Crişului commune it holds 75.2% etc. On the territory of these LAUs there are nineteen Natura 2000 sites, of which thirteen are SCI and six are APS.

Results and Discussions

To meet the goals of the study, we have proceeded to analyse some significant demography indexes related to human pressure on the environment (i.e. numerical evolution of the population, population general density, age group

pattern, active population, population activity-related pattern). To highlight the human pressure features in the Natura 2000 sites, we have determined the naturality index (NI), human pressure by forestry (HPF) and human pressure by agricultural lands (HPAL).

Demographic decrement. The 28 LAUs of the Nature 2000 sites which were taken into consideration subscribe to the general population decreasing trend, manifested at a country level too. These ranged from 103.601 inhabitants in 1992 to 98.107 inhabitants in 2002 and 91.968 inhabitants in 2011 (Fig. 2). Thus, from 1992 – 2011 the decreasing rate is -11.2%.

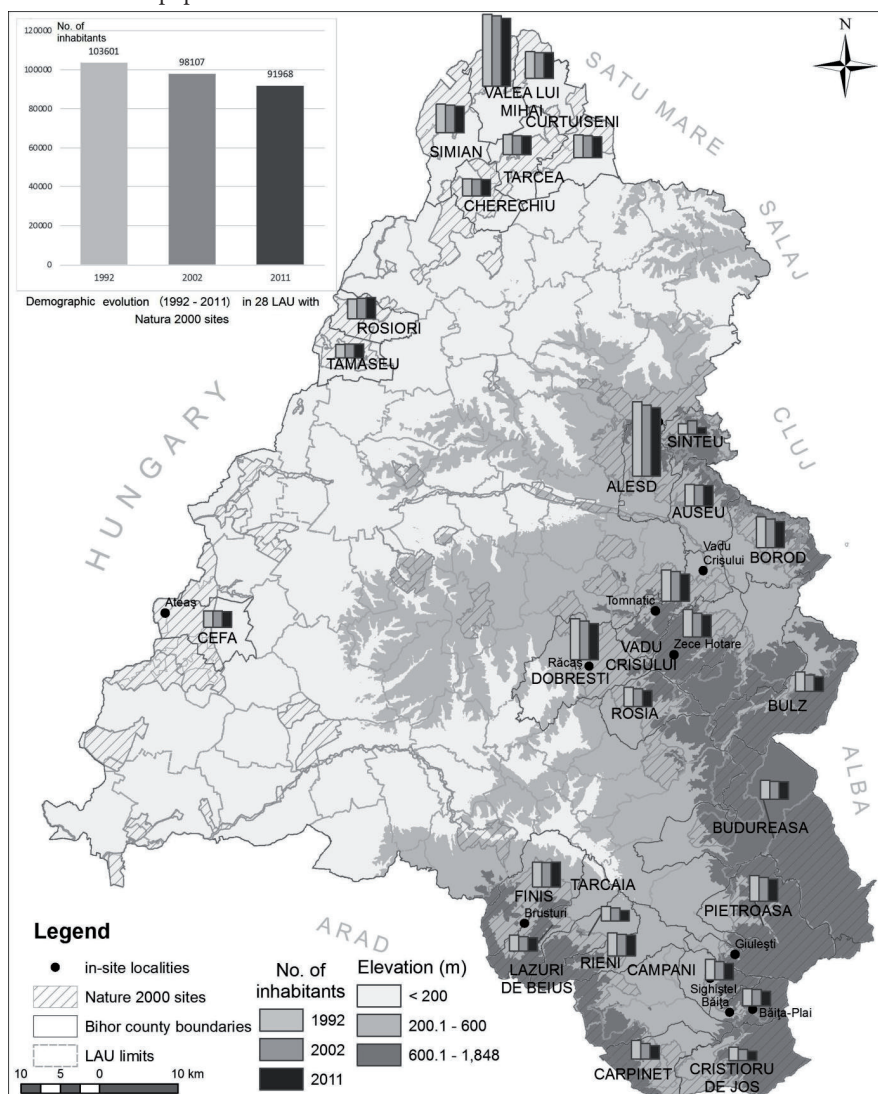
In terms of residence milieus, there is a demographic disparity between the urban and rural milieu. At the level of the three cities, including Nature 2000 sites, the population decrement is of -7.6% but in the rural milieu it is higher (-8.9%). At the level of communes, two of them register an increment (Roşiori 6.6% and Tămăşeiu 1.3%), the other ones register lower rates ranging between -0.1% (in Finiş commune) and -33.6% (Şinteu commune).

Generally, the highest population decrement rhythms can be noted within mountain communes in the so-called far-stretched rural milieu where the economic potential is reduced; a fact which triggers obvious population instability. Such is the case of the communes of Şinteu (-33.6% decrement rate), Criştiuru de Jos (-31.6%), Lazuri de Beiuş (-29.1%), Cărpinet (-28.8%), Bulz (-26.2%).

If we refer to the 11 localities at the heart in the Nature 2000 sites (fig. 1), they follow the main decreasing trend and among them, Brusturi village (Finis commune) is almost extinct (with only 4 inhabitants in 2011).

The population density is an important demographic index for the functioning of a socio-economic system. However, it also shows the level of human load being, in the meantime, a pressure index on the environment. Pătru-Stupariu (2011) considers that a lower density than 1 inhab/sqkm allows for an activity in balance with the environment and a density *over this value* indicates the visible sign of a certain pressure on the environment.

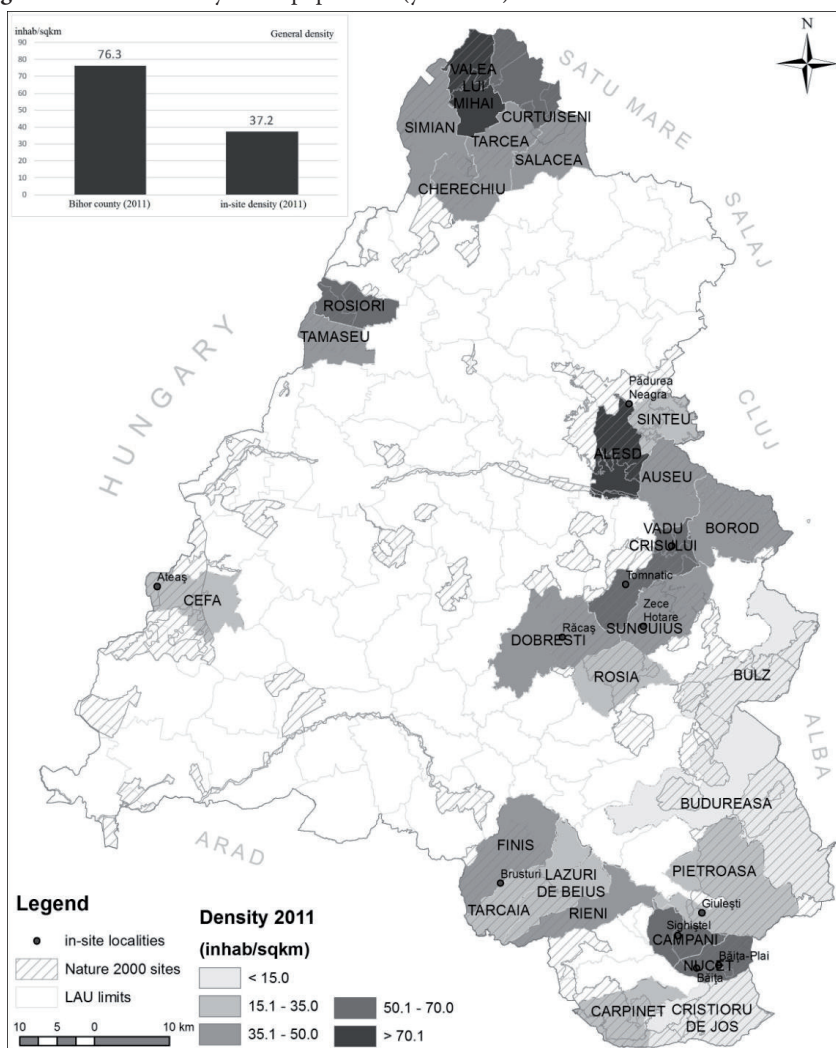
Figure 2. Hypsometric map of Bihor country, distribution of Natura 2000 sites and numerical evolution of the population between 1992-2011



The average density of the 28 LAUs is of 37.2 inhab/sqkm (year 2011), lower than the average density of Bihor County (76.3 inhab/sqkm). The highest values of the general density are recorded in the urban perimeter (Aleșd with 139.4 inhab/sqkm, Valea lui Mihai with 135 inhab/sqkm) (fig. 3).

In the rural milieu, high population density can be recorded in the low relief plain areas (Roşiori with 63.8 inhab/ sqkm, Curtuişeni with 54.3 inhab/sqkm, Cherechiu with 45 inhab/sqkm) or in the intramountainous depressionary areas (Vadu Crişului with 53.7 inhab/sqkm). The lowest density communes are found in the mountain areas (Budureasa with 7.9 inhab/ sqkm, Bulz with 14.8 inhab/sqkm).

Figure 3. General density of the population (year 2011)



Following the general population density in the eleven villages with their in-built within the Natura 2000 sites, we find out a higher concentration within the villages of Giulești (936 inhab/sqkm), Pădurea Neagră (1,201 inhab/sqkm) and Sighiștel (1,493 inhab/sqkm) which are found in the forested mountain area, where the in-built area coverage is limited (fig. 3). The villages of Tomnatic (126 inhab/sqkm) and Zece Hotare (130 inhab/sqkm) are also located in the mountain area, but the areas were deforested long ago and the hearth of the village has been growing ever since. At the opposite end is the village of Brusturi (4.4 inhab/sqkm) which will soon become extinct.

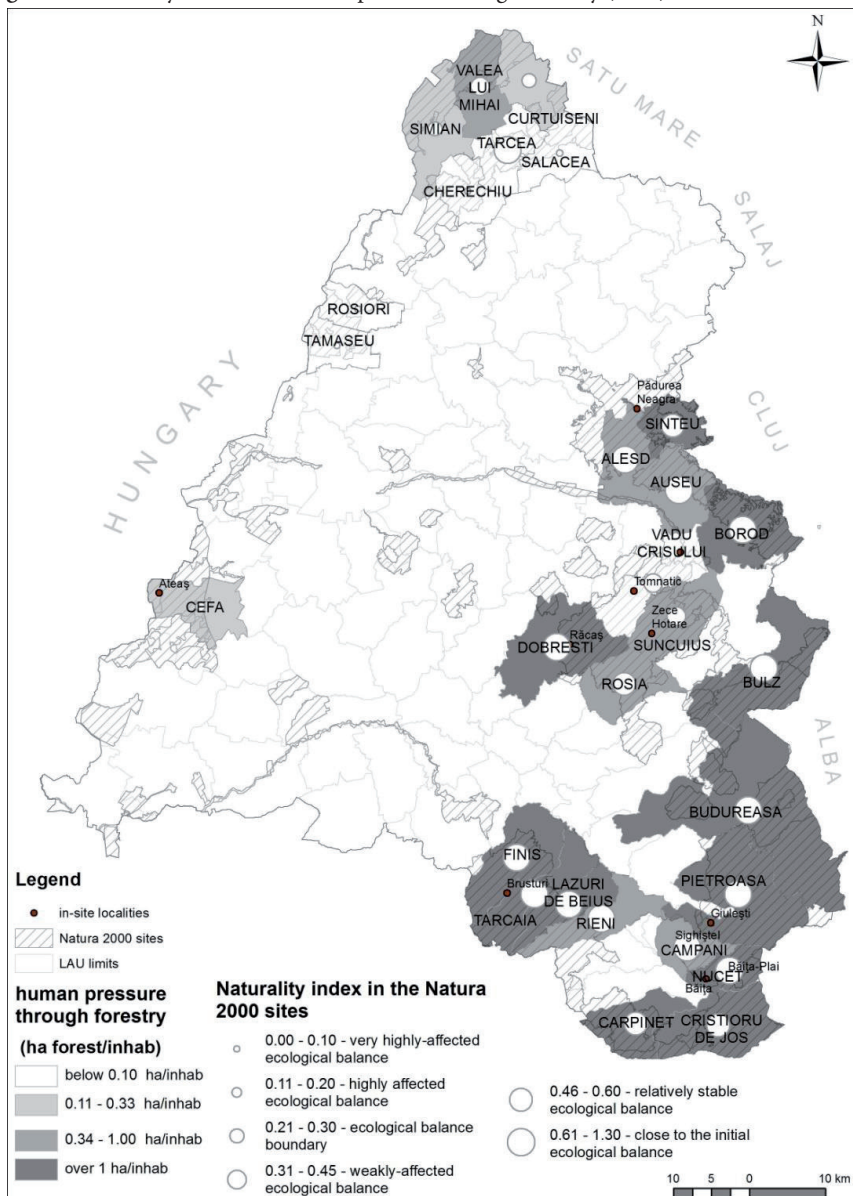
To capture the changes/disruptions which a system can hold without passing over the threshold which triggers a different stage (in the literature it is referred to as socio-ecological resilience: Resilience Alliance 2010; Drăgan 2015), we resorted to the analysis of some basic pressure indexes on the environment (Pătroescu 2000; Pătru-Stupariu 2011).

The level of human load (by general density) correlates with the *naturality index* (NI), in the context in which the forest is a first-range economic resource, the more exploited as the area is more populated. Illegal deforestations of Romania, including Bihor County are notorious and their impact resides in the fragmentation of habitats, soil erosion, landslides, flood frequency increase etc.

Within the Natura 2000 sites, the forest plays an essential role and represents the main driver of the modern land use through the naturality index of these protected areas. Owing to the fact that there are few areas with their in-built in the sites, it seems that once the area is declared as protected, then theoretically its related forests and ecosystems have better survival chances at least within mountain regions and partly the hilly ones.

Fifteen Natura 2000 LAUs are found in this situation where the ecological balance is closer to the initial one (over 0.6) (Dobrești, Budureasa, Pietroasa, Rieni etc). In the plain areas, compact forested areas are of major importance and include here the LAUs with sites at or below the ecological balance boundary: Șimian (0.29), Tămășeu (0.21), Cefa (0.12), Cherechiu (0.16), Curtuișeni (0.21), Roșiori (0.08), Sălacea (0.076) (fig. 4).

Figure 4. Naturality index and human pressure through forestry (HPF)



Closely connected to the naturality index is *the forested area per capita* (referred in the literature as human pressure by forestry – HPF). At the level of Romania, the latter is 0.33 ha forest/capita (website 3) and in Bihor it is of 0.36 ha/capita (year 2011). The FAO-suggested boundary for the maintenance of the ecological balance is of 0.3 ha forest/capita (Pătru-Stupariu 2011). Within the 28 LAUs, the average is 0.7 ha/capita, but this value is higher in the communes located in the mountainous areas which stretch over extended forest areas (fig. 4). The plain-positioned LAUs with symbolic forested areas are found at the opposite end (Tămășeu with 0.003 ha/capita, Roșiori with 0.006 ha/capita, Sălacea and Tarcea with 0.007 ha/capita) (fig. 4).

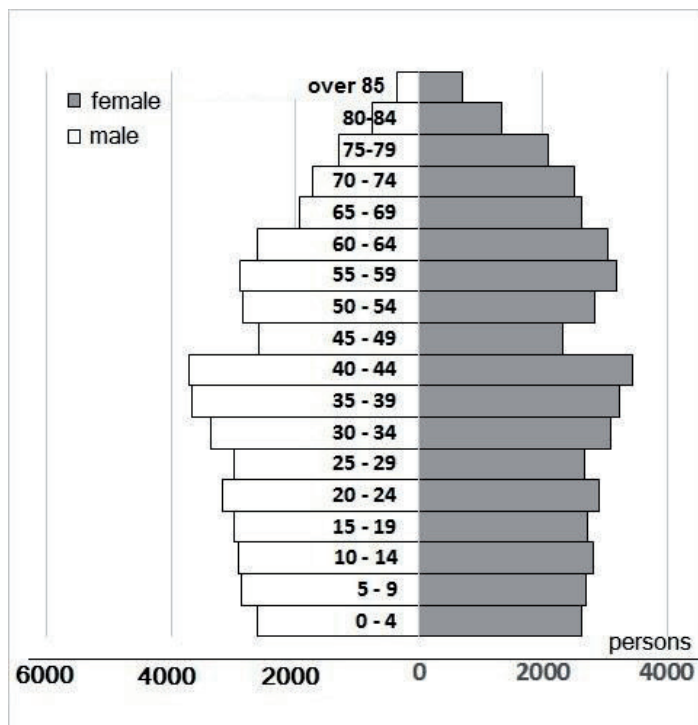
The major population age group pattern reflects the generations' chronology, revealing the unbalances which appear at the population level. For this indicator, the major age groups of 0-19 years (young population), 20-64 years (adult population) and 65-over 65 years (the elderly) were taken into consideration. A low birth rate along with the outflow (to the urban milieu or abroad) increases the demographic aging phenomenon. For the LAUs which overlap the analysed Natura 2000 sites, the population weight of over 65 years was 16.5% in 2011, almost similar to the country average (16.1%) but higher than in Bihor county (15.1%). The young population stands at 21.4% (for comparison: 21.4% in Romania and 22.2% in Bihor) while the adult population is 59.4% (in Romania 62.5% and 62.7% in Bihor). This situation differs slightly for each LAU, but the age pyramid marks the general trend of demographic aging in the 28 LAUs of Bihor County (fig. 5).

In terms of residence milieus, the younger age level registers a relative balance (24.2% in the rural and 23.9% in the urban). In the case of adults, there are already differences within the two LAU categories (58.3% in the rural and 62.8% in the urban milieus) which become obvious for the elderly (17.5% in the rural and 13.3% in the urban milieus) (fig. 6, fig. 7).

Stemming in the age group pattern, *the dependency index* for the elderly is 21.1% in the urban milieu and 30% in the rural milieu. If we also add the young population, this index maintains the following percentages: 59.1% (young-old) for the urban milieu and 71.5% for the rural milieu.

Following the weight of the **active population**, the highest values are recorded in the urban milieu (Valea lui Mihai with 44.2%, Aleșd with 32%, Nucet with 22.7%). However, in the rural milieu this index value is in many cases below 10%, while this situation is greatly triggered by the quite enhanced demographic aging level.

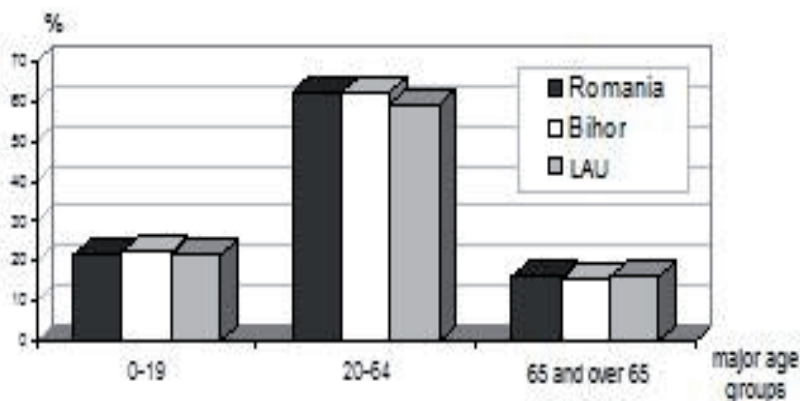
Figure 5. Population age pyramid



In terms of **activity sectors**, the secondary sectors detain the most significant weight (54.3%), due to the three urban localities' presence. We should also mention that in the Rieni commune (87.5%) there is an industrial unit which concentrates the largest share of the active population from the commune and its outskirts. Services register an average of 41.7%, but they are well represented in each LAU. The primary sector activities only absorb 4% of the active population, but the largest share of the agricultural fields is worked by the population which is not employed (the unemployed, socially-assisted persons, the elderly). Thus, in the land stock pattern, the large share of agricultural lands (over 50%) can be noted, of which the arable ones represent 51.1%, pastures and hay fields 47.9% and vineyards and orchards with their related nurseries account for 1%. If we follow the agricultural lands' spread per relief steps, then it is easy to note their prevalence in the plain areas (over 80%). This fact is emphasised by another pressure index on the environment,

namely *human pressure by land use* which gets “higher as the agricultural area weight per inhabitant is higher” (Pătroescu et al. 2000).

Figure 6. Share of major age groups (România, Bihor county, Natura 2000 LAUs)



Agricultural lands (arable, pastures, vineyards and orchards) were used as an index in this case. Thus, *human pressure by land use* (HPLU = agricultural area/no. of inhabitants) is lower in the LAUs of the mountain areas and in the intra-mountainous depressions where a subsistence agriculture is carried out. In these areas, the HPLU witnesses certain variations in the sense that they are certain administrative territories where the share of agricultural fields is reduced (0.41 – 1ha/capita – fig. 8). Furthermore, the environment is still balanced here and the landscape is characterised by the alternation of cultivated areas with areas for other usage (built space, but especially forestry blocks). There are also communes (those of the intra-mountainous depressions) where these land categories are spread over large surfaces as a result of deforestation and the environment is unbalanced (1.01- 2.0 ha agricultural lands/capita (fig. 8).

Field-located LAUs (fig. 8) feature highly unbalanced landscapes (over 2 ha agricultural lands/capita) where agricultural lands (mainly the arable) are spread over large surfaces. Although the communes of Șinteu (3.3 ha/capita), Criștioru de Jos (3.4 ha/capita) and Budureasa (4.2 ha/capita) would fall in this category, pastures and hay fields are spread over large areas and their presence does not necessarily hint at a major unbalance, as is the case of arable lands.

Figure 7. Major age group structure and demographic aging index

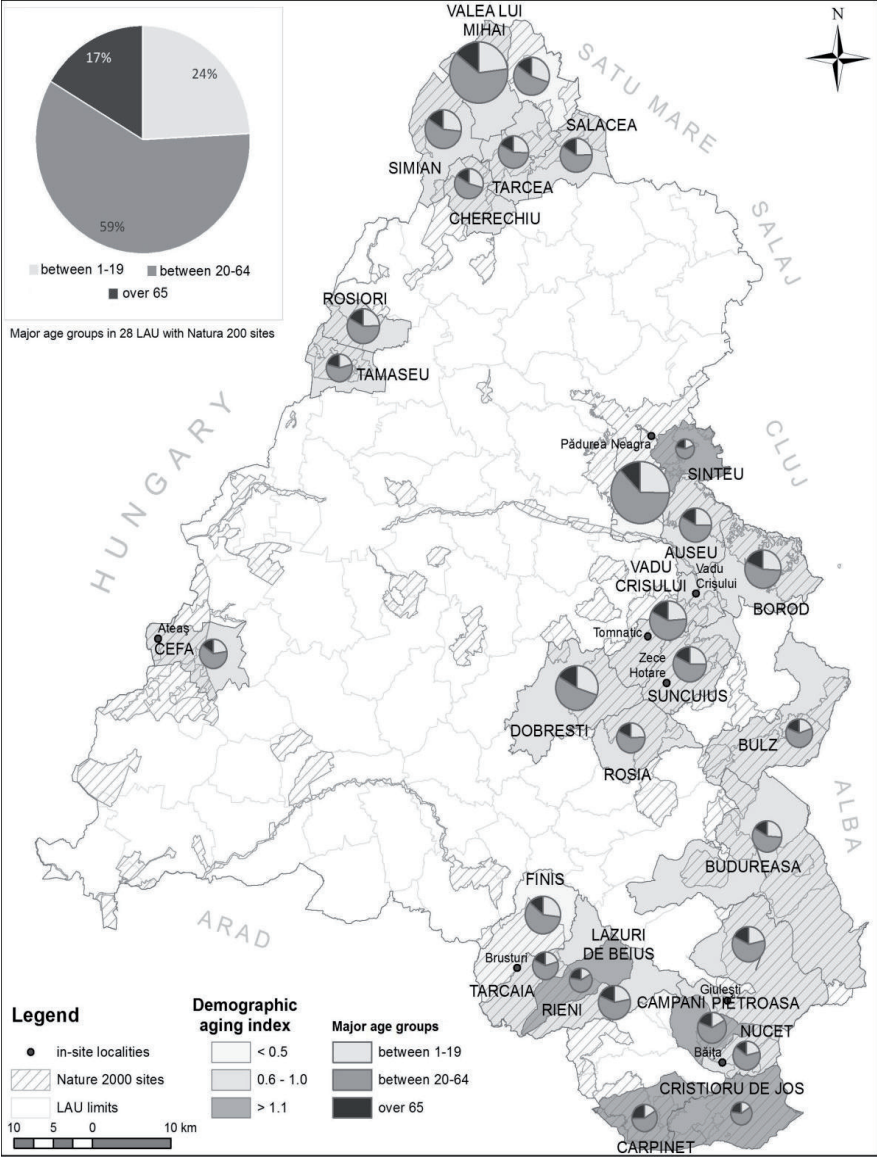
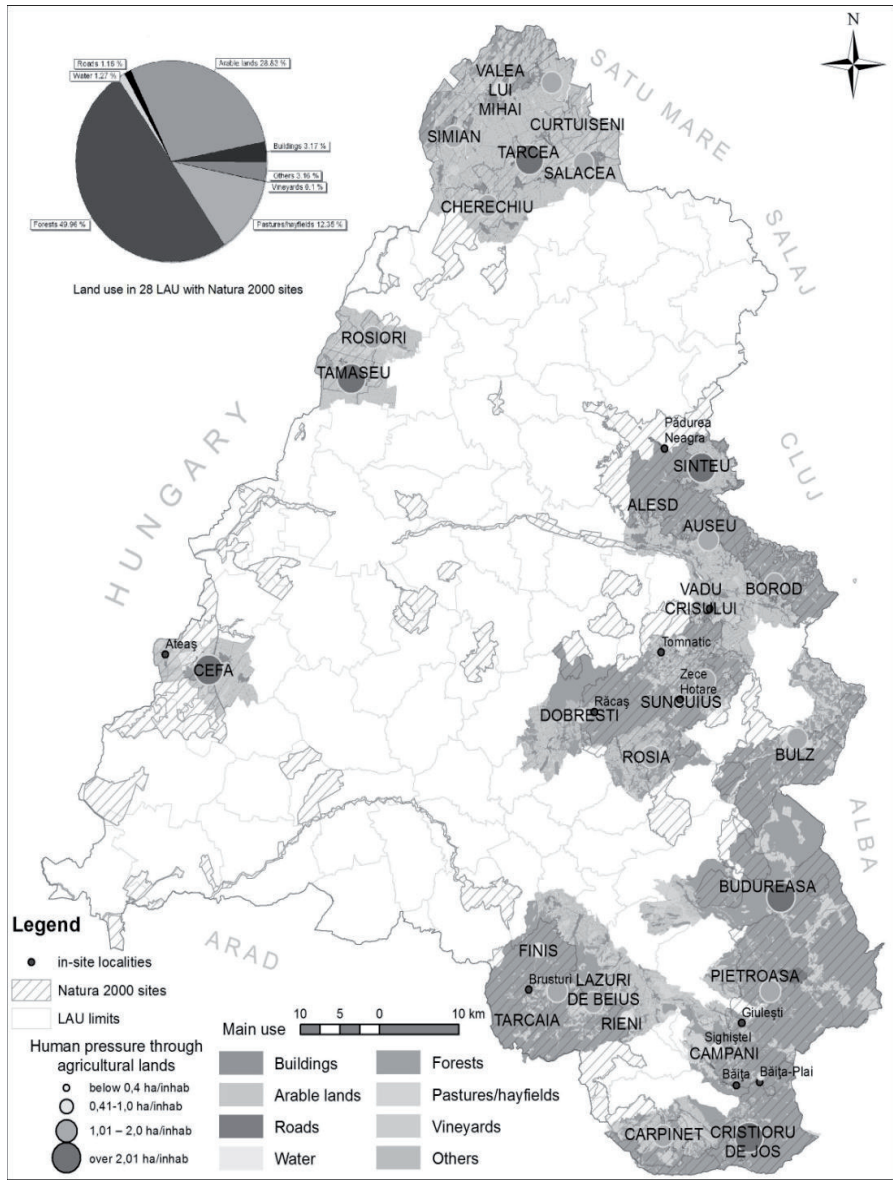


Figure 8. Land use and human pressure through agricultural lands (HPAL)



Conclusions

This research was accomplished by results that support the analysis of demographic indicators and pressure on the environment.

Demographic indicators highlight the circumstances indicating a disproportionate evolution, not very encouraging for the human communities' future of these protected areas. It has a decreasing rate in the number of inhabitants (-11.2%) during the period 1992-2011 and is more enhanced in villages included entirely in the protected areas, especially those located in mountainous areas as its likely causes are related to demo-economic development. The overall population density shows a greater concentration in cities and a lower one in rural areas, with some nuances present (they are higher in intermountain depression areas).

The major age group structure indicates the adult population prevalence (59.4% in the 28-analyzed LAUs), but there is also a demographic aging trend. Belonging to the area of residence indicates a close balance of the young population (24.2% and 23.9% in rural areas), while for adults there are slight differences between the two categories of LAU (58.3% in rural areas and 62.8% in urban areas) and the elderly are becoming more numerous in rural areas (17.5%) versus the urban (13.3%). For the elderly, the dependency ratio is 21.1% in urban areas and 30% in rural areas and for young people. Hence, this indicator maintains the trend of 59.1% for urban and 71.5% for rural areas.

Other indicators reflect the partly inconsistent and insufficient involvement of the population in a sustainable exploitation of natural resources within their sites or nearby. The highest rate of the active population (workforce) is in urban areas (from 22.7 to 44.2%), while in rural areas this indicator is below 10% in many cases largely due to the high number of the elderly and the existence of a relatively small number of viable economic projects. By activity branches, the secondary sector has the highest percentage (54.3%, due to the presence of the three cities), with services involving a significant human contingent (an average of 41.7%, well represented in each LAU) but the primary sector activities are underrepresented (only 4% of the workforce). In the land structure, the high share of agricultural land (over 50%) stands out, of which the arable land is 51.1%, pastures and hayfields 47.9%, with orchards, vineyards and associated nurseries at 1% as lands that are especially worked by the unemployed population.

Taken from the analysed sites as a whole, *the basic pressure indicators on the environment* highlight an encouraging situation for local environmental health despite some demographic and economics-related shortages and deficiencies. The naturality index (IN) shows that in more than half of the Natura 2000 sites analysed in the study, the ecological balance is close to the original (above 0.6), overlapping the villages in mountainous and hilly environments. A notable exception is in the north of the county where, owing to plains and low hills that are home to marshes and steppe vegetation, the ecological balance is relatively stable, despite a major humanisation and economic exploitation of natural resources.

The forest area incumbent per capita (human pressure through forestry) indicates an average of 0.7 ha/capita in the 28 LAUs. Mountain areas feature large forested areas (about 1 ha/capita in nearly half of the LAUs), while western lowland areas of the county feature limited forested areas (average of 0.003 to 0.007 ha/capita).

Human pressure through agricultural land (HPAL) is lower in the LAUs of mountains and depressions (0.41 – 1 ha/capita) with administrative territories where a subsistence farming is practiced with reduced farmland surfaces, in-built and forested areas. To these land features, cleared forests (from intermountain depressions) are added with an unbalanced environment (1.01 – 2.0 ha of agricultural land/capita), but also highly unbalanced plain-located communes (over 2.0 hectares of farmland/capita) where agricultural lands (particularly arable land) cover a large area. Some mountain-located communes of the eastern part of the county have pastures and hayfields spreading over large areas, but do not necessarily indicate a serious unbalance (3.3 ha/capita – 4.2 ha/capita).

In conclusion, the LAUs analysed indicate a population decrement tendency, which translates into lowering the latter's impact in the Nature 2000 protected areas. On the other hand, local actors should be more aware of the importance of nature which they inhabit. However, attention should be drawn to the fact that the local population is not the only economic actor acting in the protected areas (there are also people outside the LAUs analysed and companies interested in logging and tourism planning). Local and institutional actors should be more aware of the importance of the nature they inhabit and administer so that Nature 2000 sites are viable.

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Dalia Vidickienė

Attractiveness of Rural Areas for Young, Educated Women in Post-Industrial Society

Abstract

Most scholars of rural gender studies do not consider the essential changes in rural economy and life styles, defining rural areas as traditional and conservative. Research is still extremely fragmented into new problems facing the female population in rural areas, those arising from the changes in the lifestyle and the diversified income sources typical of post-industrial rural settlements. This article hence identifies several significant changes in economic and social life in rural areas dealing with the differences between the attractiveness of rural areas as living place for women in the industrial society of the 20th century and the post-industrial society of the 21st century.

The empirical research presented here proves the relevance of post-industrial theory in a real-world environment by testing the validity of several stereotypical opinions about the motivation to live in Lithuanian rural areas from the position of young well-educated people. The analysis of the opinions of young well-educated women reveals that their motivation is rather different from the perceptions of what was important and motivating for finding good living places; these perceptions have otherwise been pointed out by many gender studies based on the industrial society framework. These findings are a call for implementation of new rural policy measures following the higher incidence of young females as rural entrepreneurs, family farm managers, professionals, and local community leaders.

Key words: post-industrial society, industrial stage, gender studies, rural development policy, living place, Lithuania.

Introduction

The rural development policies of the EU and other developed countries seek to encourage youth to stay in rural areas because the exodus of young people from rural areas, particularly the exodus of young women, is viewed as threatening the viability and sustainability of these regions: “Young women’s rural exodus is perceived as a major problem for rural development, and one of the reasons why the EU has made gender mainstreaming central to RDPs” (Shortall & Bock 2015: 665).

Gender mainstreaming is the internationally recognised public policy concept of assessing the different implications for women and men of any planned policy action in all areas and on all levels, including legislation and programmes. The concept has been pushed in the United Nations development community from 1985. The idea was formally featured in 1995 at the Fourth World Conference on Women in Beijing, China. It was established as an intergovernmental mandate in the Beijing Declaration and Platform for Action and again in the Economic and Social Council Agreed Conclusions (1997/2).

Gender mainstreaming does not entail developing separate women’s projects within work programmes, or even women’s components within existing activities in the work programmes. It requires that attention is given to gender perspectives as an integral part of all activities across each programme. This involves making gender perspectives – what women and men do and the resources and decision-making processes to which they have access – more central to all policy development, research, advocacy, development, implementation and monitoring of norms and standards, as well as the planning, implementation and monitoring of projects.

The European Parliament resolution of 12 March 2008 first stated that the out-migration of females in economically active age groups continues to result in a degree of ‘masculinisation’ of the rural population, with negative consequences for the quality of life of the community and demographic trends. The resolution recommended mainstreaming gender into the rural sector as a key strategy, not only for the promotion of equality between women and men but also for economic growth and sustainable rural development. The recommendations were based on the report of Ch. Klač (2007), “The situation of women in rural areas of the EU” which focused on a continuing

out-migration of especially young and well-trained persons. As the majority among those who leave are women, there are negative effects on the social life of that rural area and rural economy. Furthermore, out-migration contributes to the deterioration of the number of 'communal households'.

The institutions of social infrastructure and services of public interests are heavily impaired. Additional to a loss of population, observable lower fertility rates endanger medium to long-term development of these regions. Such situations contribute to a continuing out-migration of especially young and well-trained persons in many places. Rapporteur has asked to give more consideration to gender budgeting with a view to effective governance of rural development programmes and, in particular, better targeting of funding at the specific needs of women in such areas. However, according to the study of B. Bock, a review of literature and scan of policy documents demonstrate that few rural development plans address the gender issues and, generally, only by including some separate projects for women. Little is done to address the systemic features of gender inequality and to realise inclusive developments that address the needs of all social groups (Bock 2015).

In my opinion, one of the reasons why the EU rural development programmes are not effective in using the gender mainstreaming approach is a lack of gender research conducted to provide insight and answers about what issues should be considered when developing a rural and regional policy in line with the evolution of the society. The basis for the academic field of gender studies was laid out in many countries in the 1970s, when women in academia protested against the ways in which academic knowledge production made women invisible and ignored gendered power relations in society. This was the time of intensive industrialisation of the agricultural sector and the findings of the rural gender research highlighted the gender roles relevant to the period of the transition from the agrarian to the industrial society.

However, at the end of the 20th century the European countries started the creation of the post-industrial economy. The transition into the new stage of the economic system evolution should be considered when developing the agenda of rural gender studies because the changes in the economy are changing all spheres of the social life, including the gender issues. The aim of the article is to highlight the new motivation of women to live in post-industrial rural areas with focus on the aspects which may be applicable for the rural development policy.

Section 1 provides an analysis of the new factors influencing the attractiveness of rural areas as living place with aim to explain the changes in motivation to live in rural areas using post-industrial theory. Section 2 outlines the gap between rural gender research and rural development theory, concluding with suggestions for the development of research. Section 3 illustrates the relevance of post-industrial theory in a real-world environment by findings of the survey of young well-educated Lithuanian people on the validity of several stereotypical opinions about the motivation of women and men to live in the countryside. The paper concludes with discussions towards future research on gender within the broad arena of rural studies and recommendations for rural policy-makers based on the key conceptual and empirical research findings.

New motivation to live in rural areas in post-industrial society

The situation of rural areas of the developed countries have changed very rapidly over the last two decades. Although most of the world's developed countries entered the industrial era several centuries ago, industrialisation in the agricultural sector has started much more recently. Authors studying the economic history of agriculture argue that large-scale industrialisation of agriculture started only after World War II (Federico 2005). It means that barely half a century ago the lifestyle of agrarian society prevailed in rural areas. Agriculture employed more than 75 percent of the total workforce in traditional agrarian societies, and, as late as 1950, about two-thirds throughout the world. Mechanisation, irrigation, chemicalisation and other industrial technologies have reduced the need for agricultural labour to such an extent that, by the end of the 20th century, the share of people employed in this sector in advanced countries accounted for only 2,5 percent (Federico 2005: 1).

Due to reduced labour demand in the agricultural sector, rural areas in developed countries no longer came to be considered to be an attractive place to live. They were found to offer only limited opportunities to generate other than agricultural income. Moreover, they were found to be too remote and unsafe. Most rural regions suffered an economic decline and they were classified as the poorest in Europe and other OECD countries (OECD 1994; Commission 2004). On top of this problem, in the second half of the 20th

century the adjectives used to describe a rural area as a place to live included *backward* and *stagnant*, as opposed to the urban areas which were referred to as *progressive* and *modern* (Hoggart et al. 1995; Williams 1985/1996; Woods 2005). In view of all these factors, following World War II advanced countries have introduced intensive support measures available to rural regions.

However, in the 21st century the attractiveness of a rural area as a place to live is influenced by other factors: 'post-productivist', 'multifunctional', 'reconstructed', 'new rural economy' are all terms used to describe this phenomenon. This article highlights the new factors influencing the motivation to live in rural area using post-industrial theory.

Although the decline of rural areas was pointed out by many authors in the late eighties and early nineties, announced as a general crisis of the rural world, the diversity of situations of being rural is immense. Many rural areas in Europe are now growing faster than urban regions, while others experience a declining situation (Shucksmith et al. 2006). This can be explained by the structural changes in the rural economy. A massive move from agricultural to service occupations opens new opportunities for the rural residents. Now, with the service sector dominating in the economy, the number and impact of negative factors that contributed to the weak level of attractiveness of rural areas in the industrial period is decreasing. The new factors that are key to contributing to the growing attractiveness of countryside as living place are following:

- Livelihood diversification;
- Favourable environment for co-creation;
- Mobility of working place.

At the same time, all new factors create more opportunities to use other advantages of rural living described in the voluminous rural studies: recreational environment, more communal lifestyle, safe neighbourhood, etc.

Livelihood diversification. The allegation is no longer true that rural areas are dominated by farming activities and that those who do not want or fail to engage in agricultural activities have only limited opportunities to generate revenue from other sources. In the 21st century, the *rural* economy in advanced countries is already highly diversified and farming has ceased to be the main source of income in rural areas. The changes in the economic system and lifestyle have frequently resulted in farmers living intermingled with residents of the countryside who follow nonfarm occupations at urban places of work, even to the extent that farmers are a minority within their

local rural community. In addition, the farm operator or members of his household may have a nonfarm occupation.

Favourable environment for co-creation. Long-term rural people lack a political voice and rural areas have a low national priority. Since its launch in 1991 by the European Commission as a Community Initiative, the LEADER local development approach has provided rural communities in the European Union with a method for involving local partners in shaping the future development of their area. In the recent history of rural development policy in other countries, there has also been a growing attribution of importance to the involvement of local people in collaborative development and leadership by a set of Participatory Rural Appraisal methods. The rural development programs that provide the opportunity to local people to make their voice heard as a result of their creativity with collaboration becoming a crucial factor increasing the attractiveness of rural areas.

Mobility of working place. In an industrial era, the remoteness of the rural areas was defined as an important weakness. A remote place of residence was thought to prevent people from finding an appealing job, viewed as a factor restricting leisure opportunities. However, in post-industrial society remote living place may be attractive. In recent years, rural areas, especially the most peripheral and remote ones, have become increasingly perceived and identified as spaces of outstanding environmental quality (Figueiredo 2009).

In a service economy, people find it no longer important to live close to the workplace as their activities are often relocated from factories and offices to the work location of their *customers* or clients. Work from home is increasingly becoming an important source of household revenue as ICT accessibility allows rural residents to work most of their time from home, where they fulfil assignments received from businesses based in urban areas. Cheap vehicles and a good road network have contributed to commuting quite long distances by rural citizens. Consequently, in the post-industrial society human mobility, which manifests itself as a predisposition to find employment and entertainment elsewhere to become central to promoting socio-economic development in rural areas.

All the above factors enhancing the attractiveness of rural living are important, but they are not yet strong enough to dispel myths and overcome the inertia of population in choosing a place of residence. Therefore, the prevention of depopulation in rural areas remains a key challenge of rural

policy due to the fact that rural areas are less densely populated, where even a slight reduction in population has a tangible impact on the life of the community.

In the post-industrial knowledge society, where the ability to use human resources as knowledge proponents is a key factor to success, depopulation makes rural areas very vulnerable. Therefore, the implementation of rural policy designed to develop the post-industrial society must focus on the main economic resource in this stage of the society development, with the rural population as the holder and manager of knowledge. Being that an increasing share of knowledge conducive to economic success is tacit/non-codified knowledge – which is inextricably linked to the holder (see Polanyi 1966; Nonaka and Takeuchi 1997) – population reduction beyond a critical density in certain rural regions can lead to numerous economic and social issues nationwide. Furthermore, in the context of a knowledge society, it is not only a question of the total population growth but also of their education and workforce skills. Only increased numbers of better skilled entrepreneurial people can lead to creating more added value in rural regions and make them attractive places to live.

Challenges for policy based rural gender research

Some authors argue that one of the reasons why rural policy measures are not used to address the issue of female population is that there is a lack of data about the division of men and women living and working in rural areas at regional and local level (e.g., Shortall and Bock 2006; Oedl-Wieser 2008; Istenič 2015). However, the task of improving data and information on the lives of rural women is only one of the challenges. In my opinion, the decisions of rural and regional development policy-makers lack a gender policy based on the appropriate research to provide insight and answers about those issues that should be considered when developing a policy. Successful development and implementation of effective measures mostly suffers from insufficiency of research based on the evolutionary approach. An extensive literature in demography, sociology, anthropology and social psychology has documented the transformation of gender roles associated with the process of transferring from pre-industrial (agrarian) society into industrial society. The key challenge facing the gender studies in the beginning of the 21st

century there is the similar task – the research of rapidly changing gender roles concerned with the process of transferring from industrial society into post-industrial society.

Since the last decade, rural gender research has been expanded, considering the quantity of studies and the scope of issues although, until now, the analysis of rural women's needs are based on the concept of the industrial society. Over the last decades the number of studies has grown a providing theoretical and empirical differentiation between industrial and post-industrial or post-modern rural society, which may be applicable for the rural development policy of the 21st century (e.g., Fekete & Liptak 2011; Cazorla, De los Ríos & Salvo 2013; Bruckmeier & Kopytina 2001; Vidickienė & Melnikienė 2014).

However, gender issues are not covered in this framework at all. Most rural gender studies do not consider the essential changes in the rural economy and life styles, defining rural areas as traditional and conservative. Rural areas are still contrasted with urban areas as an inferior choice of a place for women to live. For instance, even the newest study maintains, that “policies that persuade women to stay in *traditional conservative rural areas* may conflict with women's choices to leave, which would afford them greater equality elsewhere” (Shortall & Bock 2015: 663). There have thus been new insights into the motivation factors both for men and women to live in the rural area within the framework of post-industrial society. These should be a catalyst for re-thinking rural development measures concerning gender aspects at different political levels.

Diversification of the rural economy. The structure of rural economies and diversity of rural livelihoods have received increased attention in discussions about economic aspects of rural development policy during the last three decades. Post-industrial rural societies increasingly serve as residencies for persons with urban-centred sources of livelihood. In comparison with farmers, these people have varying needs in terms of perceptions of the attractiveness of rural areas to live in.

Nonetheless, studies of rural areas attractiveness for women do not draw attention to the fact that the diversification of rural economies is changing social structure of rural communities. In the rural gender studies of the second decade of the 21th century, a rural woman is identified as a farmer (e.g. Sireni 2015; Sabluk 2015). Research into the new problems of the female

population in rural areas arise from changes in their lifestyle. Moreover, the diversified income sources incident to the post-industrial rural settlements are still extremely fragmented, while gender analysis of rural society beyond farming remains very poor.

On top of these issues, research is mostly based on the concepts of a 'modern' urban and 'traditional' rural community, despite the fact that developed countries have been living in the 'postmodern' society for several decades, with the new characteristics of the society manifesting themselves in both urban and rural areas. Since the early 90s different authors have referred to the emergence of postmodernism, especially in relation to cultural and ideological changes within rural areas (Cloeke & Little 1997; Halfacree 1993; Murdoch & Pratt 1993; Philo 1993).

Cultural and symbolic dimensions of rurality are then added to socio-economic criteria, so contributing to a better understanding of rural people, while favouring more accurate approaches and actions in these areas (Cloeke 1995; Murdoch & Pratt 1993; Rinaldi 2004). The rural "becomes a world of social, moral and cultural values in which rural dwellers participate" (Cloeke & Milbourne 1992: 360). This inclusion adds to the extreme topicality of research into attractiveness of rural areas as places to live for women groups with different sources of income.

Favourable environment for co-creation. The service economy provides a fresh look at a stereotypical viewpoint of the industrial era where men should be more committed to their professional careers, entrepreneurship and leadership. According to Michie and Nelson (2006), work expectations, work interests and suitable career options are initially set by the socialisation process and by early perceptions of the structure of job opportunities for women and men. Professional gender segregation is one of the key factors influencing different career possibilities. The principal areas for professional careers during the industrial period were engineering and technology – sectors are more appealing for men. For instance, number of studies are guilty of making the "pervasive and durable equation between masculinity and technology" (Faulkner 2000: 3).

In the 21st century, the spheres of activity dealing with the service sector have become important in parallel with engineering and technology. That provides new opportunities and prospects for women, being that businesses relating to the provision of services frequently fail to be a source of inspiration

for men. Here women are much more proactive and so superior to men because such characteristics as being 'sensitive to the needs of others', 'gentle' or 'loyal' – those which are used describing femininity according to Bem's (1981) widely used masculinity and femininity index – have become the success factors of entrepreneurship and professional career in service sector. The growth of the service sector as a share of the rural economy makes the rural environment more favourable for women.

It is essential to support rural women's leadership not only at the workplace but also in social life to enable vitality of rural community through innovation and collaboration. Given its public forum, leadership has mostly been investigated from a male-dominated perspective (Kramarae & Spender 2000; Vetter 2010; O'Connor 2010). In contrast, female leadership has been relegated to the private sphere where attention was focused on family and social relation (Vetter 2010: 3).

Male domination is opposed by feminist researchers who have insisted on a leadership that advanced the goals and aspirations of women. Some of the frameworks describe the leadership from feminist perspective and demonstrated how women have conceptualised and practice their leadership roles in ways that differ significantly from most of their male counterparts (e.g. Regan & Brooks 1995; Sinclair 2014).

The service economy opens up more opportunities for women to evolve the traditional leadership style of top down management slowly into collaborative approach. More recent approaches to rural policy design and implementation have emphasised the co-creation of equitable policy environments by engaging both men and women (Ariztia et al. 2016). Current participatory approaches in rural development should be developed to increase the women's role in the co-creation process getting the findings of a growing family of *collaborative* approaches into rural development practice, such as like *collaborative* leadership, participatory leadership, relational leadership, transformational leadership, shared leadership and servant leadership (Bass & Bass 2009; Ramaswamy & Ozcan 2014; Williams 2005).

Mobility of workplace. The traditional division of male and female duties in the family is a lower priority in the post-industrial society. According to the stereotype, the duty of a man is to provide for the family while a woman's duty is to use the money earned by her husband sparingly for the household needs and to take care of the children. Therefore, when couples decide where

they would like to live in the industrial era, they often take into consideration the professional career of the man so the choice of a place to live is closely geographically related to the man's place of work. In the past, although increasing numbers of women have started to enter the labour market, men have earned better salaries than women while their place of work has become the most important factor in choosing the place of residence for their family.

However, new career opportunities have opened for women following a shift in the service sector in the post-industrial economy. Furthermore, there is a growing trend for well-educated women to earn as much as or even more than men. This trend has led to new priorities for women in choosing a place to work and live.

Different rural policy measures can be used to encourage population growth; in particular, educated, qualified people with entrepreneurial skills may be encouraged to stay in a rural region to live and work. If the challenge is to increase the numbers of young educated women in rural regions, then rural policy measures should take utmost account of their opinion of the advantages and disadvantages of present day living in rural areas.

The motivation factors for young men and women to live in the post-industrial rural settlements of Lithuania

Over the last two decades, the economic situation in Lithuanian rural areas has changed substantially. Contrary to popular belief, the rural economy in Lithuania is diverse and increasingly converges with the profile for urban areas. From 2008, the biggest employer in the rural economy has been the service sector. According to the data of the Lithuanian Department of Statistics, employment in the service sector in rural settlements with less than 3000 inhabitants in 2016 accounted for 52.2 percent, but in 2008 through 2016 it had increased by 5.9 percent. However, the total number of working age rural population is decreasing. From 2008 to 2016, the number of women has decreased by 9.5 percent and the number of men by 7.0 percent. Despite the fact that in Lithuanian rural areas there is a shortage of working age women aged 15-64 (in 2016, the number of woman per 1000 men was 913), the share of rural woman employed in the service sector is now bigger and continues to grow more rapidly. In 2008 it was 62.7 percent, while in 2016 increased to 65.4 percent.

The Lithuanian Institute of Agrarian Economics carried out a study whose purpose was to examine opinions on the attractiveness of living in rural areas in Lithuania. A research was conducted to disclose the motives of young people in choosing a place to live. The criteria in defining of a target group of respondents was based on the concept that 'within any given society, postmodern values of gender equality will be most evident among the most secure, that is, the wealthier, better-educated sectors of the public. The less secure strata will prove more traditional in their attitudes toward women' (Inglehart & Norris 2003: 18).

The research sample included 198 students of the A. Stulginskis University. It is the only institution of higher education and research in Lithuania awarding diplomas and degrees at PhD, MSc and BSc levels in the fields of food sciences, agriculture, forestry, water and land resources management, bioenergy and mechanical engineering, climate change and sustainable use of natural resources. The research surveyed year-3 students in full-time first cycle studies in academic years 2014-2015 and 2015-2016. The research sample was based on a 95 percent confidence level and 7 percent sampling error.

The research topic was very interesting for this group of respondents because, after some months, the students will have to decide where they are going to work and live. The questions were focused on respondent's motivational criteria for determining the decision to take up permanent residence in a rural area and their strategies for organising their economic and social life: i) livelihoods, ii) relationships between living and working place, iii) leadership.

The research findings suggest that Lithuania's rural environment is becoming an attractive place to live for young educated persons. Only 57 percent of the respondents expressed their intentions to live in the rural environment, stating that they had experience of living in the countryside and that they had lived in the rural environment for at least one year. However, upon completion of their studies, 62 percent of the respondents would like to choose rural areas as the place of their permanent residence. This demonstrates that young highly qualified people from urban settings find plenty of advantages in rural living.

The article presents a part of research, which reveals some interesting insights into the motivation factors for men and women to live in the rural area. It is encouraging that the choice of living in the rural environment

was expressed by a larger percentage of female (67 percent) than male (57 percent) respondents. Furthermore, more women (39 percent) than men (26 percent) are prepared to live in an isolated steading or in a small village with several dozens of houses than in a settlement with several hundreds or thousands of inhabitants. The more detailed analysis showed that this trend is largely due to a new approach amongst young educated women in relation to their opportunities for self-realisation in a rural environment.

The research was focused on the influence of new factors to the position of contemporary young people in relation to the attractiveness of rural areas as living place. The aim was to find out how strongly the following stereotypical gender differences inherent in the industrial society are still expressed amongst young educated people motivated to live in the countryside:

- men want to be business and rural community leaders;
- farming is a male profession;
- professional careers are more important to men;
- men's duties include providing for the family and women's duties include taking care of the children and the household.

The research results have enabled us to catch some important trends in the new motivations of young well-educated women to live in the countryside in terms of livelihood diversification, mobility of workplace and involvement in rural policy decision-making.

Livelihood diversification

According to Ahl's study (2006), "research articles on women's entrepreneurship reveal, in spite of intentions to the contrary and in spite of inconclusive research results, a tendency to recreate the idea of women as being secondary to men and of women's businesses being of less significance or, at best, as being a complement" (Ahl, 2006, p. 595). According to our survey, farming and rural entrepreneurship have become female gendered concepts for young well-educated Lithuanian women. The ambitions of women and men to run their own business in the rural environment that would be an alternative to farming are almost equal. Here, 16 percent of women and 22 percent of men expect to generate revenues from their own small businesses.

Analysis of the ways in which gender identities have been constructed in the literature on gender relations and farming published over the two last decades of the 20th century showing that agricultural gender research positions men as head of the family farm enterprise, while women are in the subordinate position of ‘farm wives’ defined by their dependency, their marriage and family related responsibilities (Brandth 2002). However, our research reveals that young people no longer share the opinion prevailing in the industrial era that farming is a male profession. Instead, 20 percent of the young people responding to the survey will choose farming activities as the main source of income after they complete their studies at the university; here women make up the absolute majority (96 percent). Hence, modern young educated women intend to become farmers even if they do not have a husband or a partner. Meanwhile, 68 percent of women who choose such type of livelihood are single but their parents are engaged in farming activities and they plan to involve their daughters by assigning them functions conforming to their education (agronomy, marketing, finance management, etc.) and to leave their farm to them after they retire.

To a great extent, women find farming attractive because the demand of fresh locally grown organic food in Lithuania has grown notably in parallel with care for food and nutrition safety (Eičaitė 2013; 2016; Eičaitė & Dabkienė 2014). Many farmers are trying to adapt to this situation and to supply local food for urban households, restaurants, food retailers, etc. The creation of circulation channels between farmers and local food consumers requires new knowledge about innovative organisational models such as organic, permacultural and biodynamic agriculture, as well as ITC tools. Young, well-educated women are hence ready to apply their knowledge at the family farm.

A bigger share of women (67 percent) now wants to implement innovative farming business models based on the short food supply chain and provide consulting, logistic, etc. services for their customers. The men mostly choose an agricultural business model based on traditional supply chain, while only 18 percent of men prefer the farming based on the short food supply chain. These findings are a clear wake-up call for the implementation of new rural policy measures to encourage and nurture a higher incidence of young females as rural entrepreneurs.

Favourable environment for co-creation

The rural inhabitants of Lithuania live in an environment that encourages increased participation in decision-making. The success of LEADER in rural areas has formed the opinion that, in contrast to the residents of Lithuanian cities, rural people have more opportunities to have a voice in shaping policy decisions and to become local community leaders (Grunskytė 2014). Respondents designated the greater possibility of influencing the changes in own living environment and becoming a community leader as one of the most important motives for choosing a rural rather than an urban area as a place to live. Previously, this kind of difference between rural and urban areas would only have been important to men. However, in the post-industrial stage this seems to be even slightly more important to young women than to men. Hence, 49 percent of women and 45 percent of men referred to the possibility of becoming a rural community leader and to make a tangible impact on the community as an important stimulus to live in a rural rather than urban environment. This kind of leadership will enable them to influence decisions beyond their family circle and play a very active role in promoting the social and cultural well-being of rural communities.

Mobility of workplace

Only 8 percent of the woman and 3 percent of the men hope to find a mobile working and living situation. Most of the women who have opted for living in a rural environment and looking for dependent employment (63 percent) said that they were going to find a job first and then find somewhere they would like to live. The percentage of men going to work under an employment contract and who would like to live in close proximity to their workplace accounts for 56 percent of the respondents. Meanwhile, 50 percent of the respondents – with an almost equal share of men (55 percent) and women (56 percent) – have expressed their concerns regarding the trade-off between the employability of the husband or wife in their professions and the place they live. The fact that in choosing a permanent place of residence more than 50 percent of young men think about the opportunity of the woman to pursue her professional career demonstrates a changing attitude towards the

career of women that is taking root among the representatives of the young generation.

In general, the survey results show that the young educated people have new attachments, values and perceptions with regard to rural areas depending on a larger range of social and economic circumstances than some decades ago. The findings are a call for the implementation of new rural policy measures responding to the higher incidence of females as entrepreneurs, family farm managers, professionals and local community leaders. At the same time, rural policy-makers should keep in mind that the economic and social changes in rural areas do not affect all women in the same way, while the key challenge in the post-industrial knowledge society is the differentiation of the support measures according to the level of education of the target group.

Conclusions and future research challenges

Society is not a static entity, but an ever-changing one. This article suggests that there is a lack of gender studies based on an evolutionary approach to rural development and discourses dealing with differences of concepts of gender roles in industrial and post-industrial stages of rural society's development. The concepts laid out in the literature on rural woman roles published over the second half of the past century are based on the industrial framework. To create an effective support system for women living in rural areas by measures of rural development programmes without reproducing their secondary position would mean changing opinions about gender roles in the family and post-industrial society.

However, most rural support measures are still based on stereotypical concepts of the industrial era without due regard to the fact that educated young people are already oriented towards the lifestyle and values of the post-industrial society. The further development of rural gender studies requires a shift in epistemological position. The challenge for rural gender studies would then be to distinguish new motivations and opportunities afforded to men and women living in the rural areas. To research rural women entrepreneurs, professionals, farmers without reproducing their secondary position would mean challenging the established discursive practices concerning the key success factors of farming, entrepreneurship and leadership and major areas of professional career possibilities.

The findings presented of the empirical research of the situation in Lithuania reveal a large, unused potential of young well-educated women for change rural areas. The ambitions and plans of women's self-realisation in economic and social life fall in line with the challenges of post-industrial economy and society. In such issues, innovative farming women are more oriented towards the challenges of the service economy in comparison to young men.

The findings of the empirical research suggest following these recommendations for rural policy makers:

- The role of women could be decisive in the implementation of new efficient farming business. It is therefore important to include in rural development programmes measures to support young well-educated women in initiatives for implementing farming based on short food supply chain and enabling them to spread their knowledge to other farmers and local people.
- A significant number of fixed location workers could easily switch to a more flexible approach to working. The support for the development of online workplaces for rural inhabitants may thus become an important tool for attracting new residents to rural areas, especially young women who have parental responsibilities.
- LEADER and other participatory approaches in rural development should be developed to increase the women role in co-creation process together with men.

The empirical research presented here is one of the first attempts to identify the new motivation factors for women to live in post-industrial rural areas. More voluminous studies of how social orders are gendered and of the mechanisms by which this gendering is constructed in post-industrial society would increase the ability of rural gender studies to respond to societal challenges by creating grounds for the integration of a gender mainstreaming concept and a place-based evolutionary approach in rural development policy.

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Rural Tourism Development through Cross-border Cooperation. The Case of Romanian-Hungarian Cross-border Area

Abstract

In recent decades, rural tourism has been increasingly integrated into rural development strategies. Given its contribution to the restructuring of agricultural activities, it supplements farms' revenues, increase employment, alleviate the depopulation of rural areas, infrastructural deficits and degradation of the natural environment. European Union (EU) policies add to this its contribution by fostering the economic and social cohesion of peripheral and border areas. Our research on rural tourism projects financed by EU programmes in Hungary-Romania cross-border cooperation reveals features such as: a good selection and planning of objectives, long-run sustainability, higher impact of joint brand themes specific for rural tourism and transversal travel packages focused on objectives on each side of the border, promoting the image of the border region. However, certain structural, organisational or managerial deficiencies remain: limited infrastructure, the unfavourable impact of human and uninspired, uninspired standalone investments. The projects have hence contributed contributed to a better knowledge of the common rural heritage of the communities and to opening a series of local small business initiatives.

Key words: rural tourism development, cross-border cooperation, Hungary, Romania

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Introduction

In the last decades, rural tourism is considered to be an important means of promoting rural development, and a viable alternative for small local businesses developed in synergy with the area's traditional activities, especially the agriculture. The interest of both scholars and practitioners comes from the role of rural tourism as a possible response "to changes in agricultural and rural policy and, partly, in response to changes in thinking and practice in the tourism industry" (Slee et al. 1997: 180). In terms of European economic and social policies, tourism acts as an opportunity for local businesses to "capitalize the favourable nature-based resources and the cultural heritage" (Badulescu et al. 2015a: 78), and playing a key role in revitalising rural areas, reducing excessive dependence on agriculture of small farms through activities diversification (Hegarty & Przezborska 2005), providing jobs, particularly in less developed and peripheral regions of Europe (Wanhill 1977), (Brown & Hall 2000). In EU border regions, as in the case of Hungary – Romania cross border cooperation investigated below, (rural) tourism is considered as an important part of local and regional development strategies and a priority for EU-financed operational programmes.

The aim of this paper is to analyse rural tourism development in the light of the projects supported by European funds during 2004-2013, as to reveal their contribution to fostering the tourism in rural areas, to investigate the results and the impact of this strategy on the local and regional development at the level of a particular area, i.e. the Romanian-Hungarian border region.

The paper is organised as follows. In the following next (i.e. second) section we briefly present an overview on rural tourism with a specific focus on the importance of cooperation between communities and local institutions in cross-border and peripheral rural areas. In the third part we review the literature on cross-border cooperation and euroregions, especially on Hungary-Romania Cross-Border Cooperation (HU-RO CBC) in tourism. In the fourth part we present our research on HU-RO CBC rural tourism projects. Finally, we conclude and emphasise some further policy implications.

Overview on the rural tourism in peripheral and cross-border areas

Rural tourism, which is “small in scale and traditional in character” (Lane 1994), plays an important role in valorising the individual and local resources (e.g. personal contacts, authenticity, traditions, cultural heritage, closeness to nature) and motivating cooperation among communities, neighbouring areas and regions, driving the economic development (Briedenhann & Wickens 2004). Along with investment in accommodation infrastructure, tourism planning could generate both direct economic results (e.g. new businesses, revenues, employment), and intangible results, such as place-image and community identity (Kostopoulou et al. 2015), motivating people and local and regional authorities to assign a greater importance to rural tourism.

In addition, “experiential tourism” is a type or a type of tourism that allows the integration of tourists into daily, traditional activities (Cawley et al. 2007), (Petrou et al. 2007). Meanwhile, rural tourism requires complementarity between the economic sectors (with focus on local ownership and resources use), but also cooperation between the entities involved.

Remarkable natural attractions, less known and exploited by mass tourism, traditional local products promoted together with stories and values related to the area to which they belong, festivals, celebrations and local *fêtes* which promote these products, travel packages on specific interests (e.g. food, wine, ethnographic, religious, historical attractions, local heritage etc.). These constitute very useful tools in developing and promoting the image of a region, able to incite the curiosity of tourists.

As in many cases, the rural specificity and the authenticity of the traditions are neither interrupted nor diminished by the existence of a state border. Moreover, tourists are interested in visiting regions with specific attractions, rather than administrative areas. Consequently, the cross-border cooperation (CBC) could represent a unique chance for tourism development on both sides of the border areas. The benefits for the actors involved (e.g. individuals, companies, local authorities) are obvious, but their capabilities are enhanced only if the CBC is efficient and effective. That is, if attractions are presented and valorised in a continuous and homogeneous manner, if institutional and informal networks exist and operate to assist tourists when shifting from isolated consumptions towards personalised experiences characterised by authenticity (Kostopoulou et al. 2015).

The CBC in tourism can provide means for a more effective use of local advantages, growth and consolidation of a regional tourist industry, based on sustainable consumption of the resources (Hall 2000). Joint initiatives in cross-border tourism development are frequently on cooperative/collaborative tourism planning (Reed 1999) reported a tangible success, generating substantial personal and organisational ties, as well as booting economies of scale. They eased the way for CBC in other areas of local regional interest (e.g. infrastructure, environmental protection, health, transport, culture).

According to the European Commission (EC) (2014), for the EU-28 as a whole, the share of available bed-places in predominantly rural (thinly-populated) regions is considerable, representing 41.4% in the overall accommodation capacity, while in predominantly urban area (densely populated) and in intermediate areas is considerable lower (i.e. 33.8%, respectively 24.8% of the total). However, the rural tourism infrastructure is not equally distributed across the EU area. Hence: 56% of all EU rural accommodations are located in four member states, i.e. France (23.4%), Germany (13.4%), Italy (10.6%) and Austria (9.3%) (Eurostat 2013), (EC 2014).

On the other hand, the *distribution of bed-places* (which is one of the most relevant indicators for tourism infrastructure) among EU-27 Member States reveals that seven countries report a high share of “rural” bed-places in total accommodation capacity at national level, highlighting the importance of rural tourism in these the following countries: Austria (72%), Finland (71%), Denmark (63%), Sweden (66%), Czech Republic (60%), Greece (59%), followed by Hungary (47%), Poland (46%) or Slovenia (46%) (Eurostat 2013), (EC 2014).

Regarding the number of *nights spent in rural tourism*, at a European level, the share of nights spent by residents in rural areas relative to the total night spent is relatively constant between 2012 and 2014, i.e. 38-39%, but with significant differences between countries. For example, the highest shares are reported in Slovenia (about 71%), Denmark or Austria (66%), Czech Republic, Greece or Hungary (58-63%), while Malta and Portugal (22-23%) and Romania (26%) report the lowest values (Eurostat 2015).

Considering that, in most cases, tourist activity in rural areas, particularly in agro-tourism case, is not a stand-alone activity, but rather adjacent to traditional farms. Another suggestive indicator is the *share of revenues obtained from rural tourism in total farm revenues* (or agricultural holdings).

Even the EU-27 average is 12.5%, while there are countries reporting higher revenues gained from rural tourism in total farms' revenues, e.g. United Kingdom (26.5%), Italy (23.5%) and France (18%). On the opposite, there are Cyprus and Malta with 0%, Bulgaria (0.8%) and Romania (1%). At CEE level, the best results are registered by Czech Republic (11.5%), followed by Poland (8.8%) and Hungary, Slovakia and Latvia (approx. 7% each) (Eurostat 2013).

Cross-border cooperation (cbc) and euroregions. Hungary-Romania cbc in tourism

Cross-border cooperation (CBC) refers to establishing neighbourly relations between communities and local authorities on both sides of a border. This simple definition conceals a complex reality of the past 50 years, inseparably related to the historical and political developments in Europe (Council of Europe 2006), (Badulescu et al. 2015b). The beginnings of CBC immediately followed the Second World War in the form of so-called "twinings", settled between different communities in Europe. As Perkmann (2007: 3) demonstrates,

"The classical form of a Euroregion is the 'twin association': on each side of the border, municipalities and districts form an association according to a legal form suitable within their own national legal systems. In a second step, the associations then join each other on the basis of a cross-border agreement to establish the Euroregion".

Local authorities have considered CBC as a solution to the challenges emerging from different sectors, e.g. spatial planning, economic development, transport infrastructure and tourism, environment, education, health and social services, culture, rural development (Badulescu et al. 2015b). The transfer of administrative responsibilities from central government to local authorities has determined, through various spatial and organizational arrangements, that everyone of the EU'S internal borders should be involved in creating a vast network of cooperation. Designed to promote common interests, not fragmented by borders, cooperation for the mutual welfare of neighbouring peoples, *cross border cooperation* and *EUroregions* have become areas of cooperation between local and regional authorities, playing an important role in the development and management of the INTERREG Community Initiative (Perkmann 2007).

After the transformations occurred in the early '90s, Hungary and Romania gradually made the first steps on fostering their CBC. At present, Hungary and Romania have settled three border cooperation bodies, i.e. Carpathian Euroregion, Danube-Kris-Mures-Tisa (DKMT) Euroregion, and Bihor – Hajdú-Bihar Euroregion. Beyond cooperation in the afore mentioned Euroregions, the border area between Romania and Hungary has significantly benefited from European funds designed for CBC. The administrative-territorial units included in these programmes were Szabolcs-Szatmár-Bereg, Hajdú-Bihar, Békés, Csongrád – for the Hungarian part, and Satu Mare, Bihor, Arad and Timiş – for the Romanian part (see Figure 1).

Figure 1. HU-RO CBC cooperation area



Source: Hungary-Romania Cross-Border Co-operation Programme 2007-2013

The HU-RO CBC area benefited from pre-accession PHARE CBC funds even before 1998, when the border between Romania and Hungary became eligible for this programme. Consequently, during 1996-2003, 28 million euros for Romania and 34 million euros for the Hungarian part was allocated to cross-border projects (BRECO 2015). The HU-RO CBC Programme 2007-2013 has continued the previously implemented CBC programmes, by extending and developing the already achieved results and experiences. The total budget of the programme was about 275 million euros, out of which the Community assistance through the European Regional Development Fund

(ERDF) was 224 million euros. This represents approximately 2.6% of the total EU investment earmarked for the European Territorial Cooperation Objective under the Cohesion Policy 2007-2013 (Hungary-Romania CBC Programme 2007-2013, 2015). According to the data presented on the official website of the HU-RO CBC Programme, until August 2015, there were 454 projects financed: 276 in Hungary and 177 in Romania, while the total amount of the financial support was about 214.8 million euros (Hungary-Romania CBC Programme 2007-2013, 2015). The CBC in the border area will continue in the funding period 2014-2020, based on the INTERREG V Romania Hungary 2014-2020 Programme, with an allocated budget of 232 million euros, out of which the Community assistance through the European Regional Development Fund (ERDF) will be over 189 million euros (JWG 2015: 107-109).

Tourism and rural tourism in hu-ro cbc area: facts and figures

The HU-RO CBC area is rich in touristic attractions, both natural resources and cultural heritage, e.g. high quality thermal water and remarkable natural landscapes, as well as numerous natural protected areas, various historical monuments, churches, original ethnographical and folklore elements. Wellness and health tourism is the most important form of tourism in CBC area, but other forms relevant for the area are cultural tourism (e.g. medieval monuments, architectural buildings, religious tourism, museums of fine arts or modern art etc.), rural and ethnographic tourism, active and sports tourism, and hunting and fishing tourism. Romanian mountain areas are well known for hiking trips, winter sports and speleological tourism. In addition to physical attractions, there is a rich offer of touristic events and festivals (e.g. gastro, music, theatre, dance, wine and other drinks, ethnography, religious etc.). Many of these festivals were developed recently and for a few years now attract people also from outside the area or even international tourists.

The capacity of accommodations (measured in beds) is a useful indicator to measure the tourism development in the counties involved. According to the National Institute of Statistics (Romania), (2013), and the Hungarian Central Statistical Office (2014), during 2007-2014, the Hungarian counties had a constant larger capacity of accommodations, approximatively two third

from the capacity of the overall CBC area (i.e. 46,000 to 50,000 bed places in Hungarian counties, compared to 23,000 to 29,000 in Romanian counties). Despite the significant difference in capacity, the counties on both sides of the border attract quite similar numbers of visitors every year (around 2,300 thou. in each area). The Hajdu-Bihar County (HU) is the leading tourist region both in Hungarian border area and also on the whole CBC area, with more than one million nights spent, closely followed by Bihor County from the Romanian side.

Inside the HU-RO CBC area *the share of foreign visitors is fairly low, with almost 80% of the tourists that are primarily of domestic origin* (MEGAKOM Development Consultants et al. 2014), (Hungarian Central Statistical Office 2014), (National Institute of Statistics Romania 2013), (Eurostat 2013). The occupancy rate in Hungarian counties is around half of the Romanian ones (the CBC average is around 21%). However, the last years have recorded a slight improvement in this indicator, compared to the difficult period 2009-2012.

In terms of rural tourism accommodations capacity (in beds), we took into account only the capacity of rural pensions/ agro-touristic boarding houses, as they appear in statistical reports. Thus, we assume that this selection excludes different accommodation forms, such as motels, tourist inns, chalets, villas or holiday villages etc., located in rural areas. Methodological inconsistencies and statistical re-classification which had occurred in both countries during the 2006-2009 period (see NACE1 and NACE2) explain, probably, the discontinuity in statistical data and the excessive variations recorded year to year. Given these precautions, the data presented in Table 1 indicate that the total number of beds in agro-touristic boarding houses in HU-RO CBC area is growing steadily, from about 1,900 bed places in 2010 to over 3,000 in 2014. The largest increase is reported among Romanian counties, which, during this period, recovered significant gap that had separated them from the Hungarian ones.

Table 1. Number of bed-places in agro-touristic boarding houses in HU-RO cross-border area (2010-2014)

County	2010	2011	2012	2013	2014
Hajdú-Bihar (HU)	610	590	553	569	655
Szabolcs-Szatmár-Bereg (HU)	1,101	1,033	916	1,026	1,145
Békés (HU)	722	763	131	127	140

County	2010	2011	2012	2013	2014
Csongrád (HU)	611	646	696	683	668
Bihor (RO)	556	709	1,122	1,053	1,332
Satu Mare (RO)	63	54	84	84	164
Arad (RO)	372	415	556	570	517
Timiș (RO)	137	265	317	349	403
Total HU	1,221	1,236	1,249	1,252	1,323
Total RO	693	974	1,439	1,402	1,735
Total CBC area	1,914	2,210	2,688	2,654	3,058

Source: National Institute of Statistics (Romania), (2013), Hungarian Central Statistical Office (2014), <http://statinfo.ksh.hu>

Eu-funded projects supporting the development of hu-ro cbc rural tourism: a short analysis

EU funding programmes supporting tourism take many forms, supporting tourism development either directly, i.e. through co-financing of projects, or indirectly, i.e. via financing surveys, studies, researches etc. important for creating the pre-conditions for investments and planning. The main EU instruments to support tourism development are the European Regional Development Fund through INTERREG IVC (European Territorial Co-operation) and the European Agriculture Fund for Rural Development. While the European Agriculture Fund for Rural Development supports the development of rural small-scale touristic and recreational investments, or information systems/tourism promotion. Meanwhile the INTERREG IVC is focused on joint thematic concept, enhancing the relations between the (rural) communities of the border areas, to create well established connections among the attractions from both sides of the border (MEGAKOM Development Consultants et al 2014).

As shown in Table 2, in the HU-RO CBC area, tourism and, in particular, rural tourism, has received significant attention, i.e. 8% of total number of projects financed and about 9% from the allocated funds (according to official data provided by BRECO (2015). Specifically, under PHARE CBC 2004-2006 we have identified a number of 4 rural tourism projects funded, with a total value of EUR 532,000 (60% from the total amount allocated to

tourism in this period). In the HU-RO CBC 2007-2013 programme we have found 26 projects supporting rural tourism with an aggregate value of EUR 12,750,000 (i.e. 70% of the total amount allocated to tourism in this period). Therefore, according to official data (BRECO, 2015), these projects were financed under the European funding programs related to CBC 30 projects targeting rural tourism, i.e. including activities supporting and promoting rural tourism (see Table 2).

Table 2. The number and value of (rural) tourism projects, financed under the HU-RO CBC programmes during 2004-2013

Programme	Priority	Measure/ Key area of intervention	Number of tourism projects (out of which: rural tourism)	Grant amount, (out of which: rural tourism, (thousand euros))
INTERREG IIIA/ Phare CBC Programme 2004-2006, Hungary-Romania	Priority 2: Promotion of cooperation initiatives in order to facilitate the integration of markets and enhance coherence between local societies	Measure 2.2: Support co-operation of enterprises – (joint initiatives in the field of marketing, tourism and other business co-operation	6 (4)	834 (532)
HU-RO CBC 2007-2013	Priority 2: Strengthen social and economic cohesion of the border area (Cooperation in the fields of business, RTD, education, labour market, health care and risk management)	Measure 2.1: Support for cross-border business cooperation Action 2.1.3. Development of tourism – small scale investments in tourism attractions and tourism infrastructure	34 (26)	18,112 (12,751)

Source: BRECO (2015), Hungary-Romania Cross-Border Co-operation Programme 2007-2013

In a detailed analysis of the 30 financed projects aiming to promote tourism in rural areas of the HU-RO border area, we found the following (see detailed data in Appendix):

- a. *The partners:* 18 projects were submitted by Hungarian lead partners, and 12 by Romanian ones. We found 65 partners, as it could be more than 2 partners, provided to be on both sides of the border, mostly public institutions of local government (i.e. rural or urban mayors, county councils etc.) and non-profit associations, foundations, NGOs.

- b. Objectives and types of tourist activities which were financially supported:
 - Events and festivals associated with specific products and ethnography: 6 projects;
 - Touristic routes (e.g. medieval, cultural or religious points of interest) and thematic packages: 14 projects including 12 new routes, such as: Inns route, Crafts route, Wine route, Valuable landscape route, Health route, Water route, Personalities route, Rural houses and rural museums route, Local traditional products route, Caves and karst formations route;
 - Organizational support / promotional activities (e.g. best practices, opportunities or modern techniques promotion and dissemination etc.): comprising of projects;
- c. *Area: the projects are relatively equally distributed within the cross-border area, although a third of these projects include activities taking place in more than two neighbouring HU-RO counties.*
- d. *Financial issues: the ERDF financial contribution in financing the projects was approx. 80% of the total budget, with an average ERDF intensity of EUR 500,000 per project.*

The main challenges of the tourism sector in HU-RO CBC area include tackling both infrastructural and organisational deficiencies, both in Hungary and Romania. Certain structural difficulties are outside the scope and possibility of prompt correction within specific, tourism-focused projects. Firstly, there is the impact on tourism of the human activities in agriculture, in certain industrial sectors, transportation, forestry and in the, increasing amount of the municipal solid waste. They affect the nature by pollution, biodiversity loss etc., and, thus, they produce a degradation of the natural attractions, specific for rural areas tourism (JWG 2015). Secondly, the general infrastructure and its deficiencies have a negative impact on tourism. Finally, there is a continuous deterioration of the cultural and ethnographic heritage which underpins the attractiveness of rural areas.

On the other hand, there remain some specific challenges regarding rural tourism and its weaknesses. Thus, we refer to insufficient public transportation connections to the sites, the lack of the touristic infrastructure and services, lack of touristic road signs especially in mountain areas, difficult access to certain rural destinations. Moreover, there is an insufficient and un-professional coordination and marketing of touristic attractions, lack of

information, synchronisation and essential touristic maps and informative materials. In the case of 12 projects (from the total of 30 projects which were analysed), the official site is not functional for it does not describe or refer to the project, nor has it not been updated in the last 6 months.

About two-thirds of the projects have published their promotional materials and tourist information without integrating or promoting a unified image of the Euroregion or CBC area, as assumed through the project. Many natural and historic values are instead presented as standalone attractions, as parts of an integrated package, and therefore have a limited visibility. There are many public or private initiatives, funded or otherwise by EU funds, which are focused only on infrastructure development, without relying on a joint thematic concept or common strategy. Certain thematic packages and investments do not actually contribute to promoting and enhancing the attractiveness of the area and make the joint development of complementary attractions difficult (JWG 2015: 19-20).

Beyond the limited success and some weaknesses of tourism development in the border area, the analysis of HU-RO CBC funded projects suggests several successful and achieved goals:

- Most of the objectives assumed by the projects financed through HU-RO CBC programmes have been achieved and the projects proved to be operational even after ceasing their funding, which indicates both a good selection of the programmes' objectives, and an adequate planning, able to ensure their sustainability and encourage future initiatives;
- The thematic routes have proved to display a significant cross-border profile; they have created good connections among the rural attractions from both sides of the border;
- In the case of promotional activities, the projects assuming to introduce a joint brand theme specific for rural tourism (e.g. local culinary attractions, folk festivals, crafts) have focused on common target groups in order to reach a higher impact (JWG 2015: 26).

Conclusion

Rural tourism is a key element of in the development of rural areas, and is therefore included in the development strategy for rural, remote and border

area of the EU, through various supporting policies and funding programmes. The most important programmes are the European Regional Development Fund through the INTERREG IVC (European Territorial Co-operation) and the European Agriculture Fund for Rural Development.

In the specific case of HU-RO CBC area, tourism and particularly rural tourism has been considered as a key issue of rural development and a way of fostering non-agricultural economic activities in rural areas. It contributes to strengthening cross-border cooperation within projects and actions, it involves a large range of institutions and tourism operators, it contributes to identifying and managing shared resources, and to promoting the CBC area or euroregion as a unique destination etc.

The post-factum analysis of the CBC projects developed in rural tourism indicates they have met most of their aims, while effective joint actions (e.g. transversal travelling packages, thematic routes with cross-border tourist attractions) had a much greater impact than the sole large-scale investments. However, several of structural and organisational deficiencies still remain, which are unlikely to be resolved or at least significantly improved in the next period, e.g. the underdeveloped tourism infrastructure (especially in the Romanian mountain area), the negative impact of human activities, the degradation of natural and cultural attractions, the unprofessional coordination and promotion.

For the future, a successful CBC in tourism areas should definitely consider moving from stand-alone investments and projects to integrated actions in rural tourism. It should encompass various natural and man-made attractions in rural packages *and rural tourism destinations, well designed and able to enter into European or international competition. Another priority must be* the development of an integrated promotion of the rural tourism at cross-border and euro-regional level. Finally, more significant and effective involvement of local communities, individuals and local businesses is needed, for developing joint programmes and more focus on economic performance and sustainability issues of the projects.

The CBC in Central and Eastern Europe is undoubtedly still far from drawing upon its full potential. Nonetheless, the results already achieved in a relatively short time period by the Hungarian-Romanian CBC programmes in the development of rural tourism are certainly positive and encouraging.

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Appendix. Rural tourism projects financed under the HU-RO CBC Programme 2007-2014

No.	Country	Title	Action	Lead partner	Lead partner ERDF awarded (EUR)	Total Project budget (EUR)	Total ERDF awarded (EUR)
1	HU	Plums as connecting link in the development of the tourism in the Szatmár Region	2.1.3.	Association of Szatmár-Bereg Palinka Knights	88,274.2	212,116	172,757
2	HU	Route of Medieval Churches in Szabolcs-Szatmár-Bereg and Satu Mare Counties	2.1.3.	Szabolcs-Szatmár-Bereg County Self Government	60,878.7	89,138.8	75,767.98
3	HU	Innovative implementation of joint tourism programme packages for tourism development in Hajdú-Bihar and Bihor counties	2.1.3.	Chamber of Commerce and Industry of Hajdú-Bihar County	53,393.69	96,510.27	80,623.55
4	HU	“Adventure, recreation, entertainment” dissemination of tourism supply of Hajdú-Bihar and Bihor counties	2.1.3.	Social Affairs and Child Protection	19,660.5	510,795	422,942.3
5	HU	Development and promotion of ecological tourism opportunities (rural tourism) of the North-East Great Plain and the Apuseni Mountains range	2.1.3.	Friends of Nature Tourism Association, Debrecen	54,910	171,435	141,071.4
6	RO	Best practice based rural tourism host and courier training for tourism development of the border regions	2.3.1.	Partium Christian University	62,084.85	160,946	131,756
7	RO	Joint development and integrated promotion of rural thematic tourism in the Bihor-Hajdú-Bihar Euroregion	2.1.3	University of Oradea	86,097.35	174,866	148,636.1
8	HU	Gastronomic journey in Szabolcs-Szatmár-Bereg and Satu Mare counties	2.1.3.	Regional Development Agency and Environmental Management Office of Szabolcs-Szatmár-Bereg County	88,034.5	148,760	121,802.3

No.	Country	Title	Action	Lead partner	Lead partner ERDF awarded (EUR)	Total Project budget (EUR)	Total ERDF awarded (EUR)
9	HU	Routes and adventures without borders in the DKMT Euroregion	2.1.3.	DKMT Danube-Kris-Mures-Tisa Euroregion Development Nonprofit Agency	148,355.5	195,635	158,300.5
10	HU	Legends of Szatmár	2.1.3.	Szatmár Leader Non-Profit Association	79,580.74	152,220	124,286.2
11	RO	Development of touristic portal and database on the touristic attractions of 8 cross-border area counties	2.1.3.	AREgiline Association	201,276.3	401,828.2	330,637.8
12	HU	Joint tourism development in Szabolcs-Szatmár-Bereg and Szatmár counties built upon historical and natural resources think in term of active leisure	2.1.3.	The People's Health Foundation ¹	123,001.2	187,879.8	153,224.1
13	RO	Enhancing cultural capital value for tourism and business development through cross-border cooperation	2.1.3.	Salonta Municipality	217,574.5	505,920	430,032
14	HU	Organisation Thematic Tourism Programmes in Körös-Valley	2.1.3.	Regional Development Association of Közép-Békés Local Council	71,394.9	113,653	95,944.76
15	HU	Ecotour between Periam-Makó	2.1.3.	Mako Municipality	144,131.1	276,407	234,946
16	HU	The Role of Special Local Foods and Events in Development of Rural Tourism	2.1.2.	University of Szeged	35,759.5	78,548	66,041.13
17	RO	Religious Bridges – Promoting the religious tourism in Bihor and Hajdu-Bihar Counties	2.1.3.	Oradea Municipality	1,106,251	1,709,985	1,374,955
18	RO	Creation of new tourism objectives through Rehabilitation and Culture	2.1.3.	Sannicolau Mare Municipality	659,462.3	992,529.7	843,650.2

No.	Country	Title	Action	Lead partner	Lead partner ERDF awarded (EUR)	Total Project budget (EUR)	Total ERDF awarded (EUR)
19	RO	Promoting our Common Heritage – Revitalization of The Cultural Tourism in Hajdu Bihor – Bihor Euroregion	2.1.3.	Bihor County Office for Culture	72,970.8	842,314	690,805
20	HU	Creation of terms of religious tourism building for Romanian Orthodox Church in Békés and Arad county	2.1.3.	Romanian Orthodox Diocese in Hungary	561,765	1,305,940	1,097,868
21	HU	Maria's Ray – Protection and Presentation of Mutual Religious Tourism Values	2.1.3.	Hajdúdorogi Diocese	581,162.9	1,384,574	1,176,888
22	HU	Tourism attraction development of the Route of Medieval Churches	2.1.3.	Hungarian Reformed Church of Tiszántúli Parish	584,852.7	1,480,887	1,248,204
23	RO	Banatian Village Living Museum, Csongrad – Timiș Tradition and Multiculturality	2.1.3.	Social-Economic Development Agency of Timis County (ADETIM)	165,932.3	1,296,148	848,387.7
24	HU	Establishment of an Ecumenical Religious Route in Temes and Csongrád Counties	2.1.3.	Ópusztaszer National Historical Park Office	422,990.3	1,395,229	1,163,682
25	RO	Sport, a tool of the cross-border touristic offer development	2.1.3.	Dumbrăvița Local Council	750,000	2,143,351	1,417,978

Notes: 2.1.3. Development of tourism – small scale investments in tourism attractions and tourism infrastructure; 2.3.1. Cooperation in the labor market and education – joint development of skills and knowledge; 2.1.2. Cooperation between businesses

Source: Hungary-Romania CBC Programme 2007-2013 (2015)

Beata Bielska, Michał Wróblewski

**Central-Eastern Europe as Postcolonially Involved
(Sub)peripheries***

**Giordano Christian, 2015. Power, Legitimacy, Historical Legacies:
A Disenchanted Political Anthropology, Wien, LIT VERLAG**

The latest book by Christian Giordano – Professor of Social Anthropology at the University of Fribourg (Switzerland), whom the readers of Eastern European Countryside (EEC) know perfectly well¹ – is a collection of 16 works (including 13 that were published before, between 2001 and 2014²) preceded by an introduction. These texts refer, amongst other subjects, to the anthropology of politics and economy, alongside issues of ethnicity, nationalism and interculturality in different regions of the world (Latin America, Southeast Asia, Western Europe and Southern Europe).

* This review essay is an effect of discussions held in “European Integration” classes taught by Professor Andrzej Kaleta, PhD. in the 2015/2016 academic year, within the frameworks of PhD programme in the Institute of Sociology of Nicolaus Copernicus University in Toruń. The discussion participants also included Hanna Krocak, Marcin Wernerowicz and Justyna M. Zarzycka whom we would like to thank for their consent for their summaries and notes prepared for the purposes of seminar meetings to be used in this essay.

¹ A member of its Editorial Board from the first issue (1993), as well as an author of many articles published in EEC concerning transformations of rural areas in the countries of Central and Eastern Europe.

² Among others, in EEC: Multiple Modernities in Bulgaria. Social Strategies of Capitalist Entrepreneurs in Agrarian Sector, Eastern European Countryside 2010/16.

Having considered the specific character of EEC, we focus on several chapters. Four of them³ more-or-less refer to the problems of the countries of Central and Eastern Europe⁴, while two of them⁵ may be said to introduce the reader to historically, culturally and methodologically complicated issues defining different parts of Europe.

Giordano discusses these issues already in the beginning of the book, giving some thought to the legitimacy of the division of Europe into western, eastern and central parts in the first chapter. He emphasises that although this division is often accepted and quite legitimised in social science, one should remember that, from the historical perspective, the discourse on Europe has always required references to what is not Europe. Moreover, Giordano's line of thought is consistent with the findings of Michael Hardt and Antonio Negri who, in their *Empire* (2005) book, propose a thesis on European identity (referring to 'the continent of civilisation, enlightenment and progress') shaped by the experience of colonialism.

Europe has needed something different to itself to create its own progressivist ideology by means of juxtaposition. Today, it seems that Central and Eastern Europe itself can be perceived as this 'Anti-Europe' if one perceives it in the category of "The Cold War". What is more, the media discourse more frequently uses the notion of "two-speed Europe", highlighting its division

3

Chapters: 7 – *Does Postsocialism in Eastern Europe Mirror Postcolonialism? The Legends of Revolution, Transition and Transformation after the Fall of the Berlin Wall*; 8 – *The Social Logic of Informality: The Rationale Underlying Personalized Relationships, Organisations and Coalitions – A Look at Southeast European and Mediterranean Societies*; 13 – *Modernization, Land Reforms and Ethnic Tensions: Scenarios in Central and Eastern Europe*; 14 – *Multiple Modernities in Bulgaria: Social Strategies of Capitalists Entrepreneurs in the Agrarian Sector*.

⁴ The author uses a hardly coherent and simplified interpretation of Central and Eastern Europe (calling it also the Eastern Bloc) as a historical and geographical region dominated by the four great imperial powers (Austria, Germany, Turkey and Russia) till the end of the First World War, and by the Soviet Union after the Second World War (till 1989). Therefore, in his deliberations, Central and Eastern Europe is composed by both Poland, Romania or Bulgaria, as well as former Yugoslavia and today's sovereign states established after its breakup.

⁵ Chapters: 1 – *Interdependent Diversities: Self-Representations, Historical Regions and Global Challenges in Europe*; 2 – *Dealing with the Past: The Mobilisation of History in European Societies*

into more (the so-called 'old' fifteen Member States) and less (13 states admitted to the European Union after 2004) developed parts.

The book includes many purely theoretical deliberations aimed at developing a proper set of analytical instruments to provide further clarification in relation to the specific character of the Old Continent. It also offers extensive empirical materials of exemplary nature subject to multifaceted juxtaposition to specify a common root of historical experiences of different countries. In his analysis, Giordano offers a combination of the perspective specific to history and the perspective of social science (Chapter 2.), simultaneously criticising the presentism typical of sociology. According to the author, social sciences too often look for the reasons for phenomena analysed in the context of the here and now; one valid example here could be social phenomenology.

Since the time of Kant, this erroneous and harmful cognitive perspective in the history of European thought has distinguished the historical method from the methods of social science. At the same time, it has required a revision when referring to a more anthropological view of history emphasising the continuity of the past things in the present. Giordano's ally here is Immanuel Wallerstein who, in his famous *Unthinking Social Science* postulates unification of the methods of perceiving social phenomena, including the historical and sociological perspectives once separated by the tradition of Enlightenment.

Taking both reference points into consideration – the attempt to specify the character of Central and Eastern Europe as an Anti-Europe, and the methodological settlement combining sociology and history – we have decided that our comments to the book by Giordano organise two theoretical paradigms: postcolonialism and the world-systems theory. Firstly, we would like to draw significant properties of Central and Eastern Europe out of his analysis, showing its half-peripheral character but mainly in the context of an unequal relationship between dominant and subordinate societies.

Second, the author himself indicates such possibilities of interpretation, while the example can provide bibliographical references to the books by Wallerstein (one of the main representatives of the world-systems theory), as well as several mentions of the postcolonial theory inside the book. Third, the social phenomenon of subordination is of a historical nature, being that peripheries are also areas demarcated by centuries of subordinate relationships. The historical perspective assumed by the author is related to world-systems theory and postcolonialism in the methodological sense,

as both paradigms refer to the assumption of Fernand Braudel concerning the existence of long-term historical structures. Indeed, it seems that, in his deliberations, Giordano shares the opinion of the founder of the *Annales* School who called for a discussion of civilisation transformations at a broadly-defined historical background.

Central and Eastern Europe as peripheries and half-peripheries

According to the famous world-systems theory by Immanuel Wallerstein (2007), economic phenomena should be discussed by using a unit of analysis not of a single state, but a complex structure of many subjects composing one system called a 'world system' by the author. One of the specific features of this system is an axial division of labour joining central and peripheral areas together. The exchange between the centre and peripheries is asymmetrical; the centre uses the peripheries as, for instance, its sales market or by maintaining low labour costs. Simultaneously, this serves as a relation of mutual dependence where the centre and peripheries need each other. The centre generates the elements of both cultural and economic domination. It imposes cultural patterns, political ideologies, ways of different institutions' functioning, and, most of all, profit from the fact of the existence of peripheries.

The centre is the most modern place in an individual world-system and that means it has got the most modern economic model and most developed mechanisms of generating innovations. In the context of the world-systems theory, researchers often discuss the problem of modernisation of peripheries which is generally imitative in this paradigm. Thus, its effects are not usually so spectacularly positive compared to the central areas (Leszczyński 2013), although it can still cause peripheries to develop. However, the modernisation only transforms them into half-peripheries; that is, the areas which, on one hand, aspire to being in the centre, while, on the other hand, are burden with many properties maintaining their peripheral character.

Having considered the afore-mentioned concept of Wallerstein, it is quite easy to notice that in the excerpts of Giordano's book dealing with the search for the specific properties of Central and Eastern Europe, the author focuses on discovering its peripheral nature. For instance, in Chapter 8, Giordano analyses the notion of informality, pondering over the functionality of informal relations for the specific types of societies. He indicates that this

type of social relations constitutes the society's answer to the institution of the state weakly rooted in the citizens' consciousness, a kind of means of adaptation in the face of no formal and imposed proceedings.

Giordano discusses societies of public distrust characterised by a value opposition of public and private spheres (the private is contrasted with a negative and harmful force of the public), along with morality telling one to put one's own and inner circle's interest first and ties of kinship as the foundations of community relations. On the other hand, Chapters 13 and 14 offer examples of imitative modernisation, they are also specific to peripheries and half-peripheries. In the former chapter, Giordano analyses the effects of accepting the agricultural reforms by different countries of Central and Eastern Europe in the 19th and the beginning of the 20th century.

He points out that the hidden agenda of these reforms was creating a national community by tying people to land and he interprets this process as a peripheral mutation of nationalisation of culturally backward societies through breakneck attempts to speed up modernisation as the result of extreme political decisions. What is more, the author suggests that the reforms have not contributed to achievement of social homogeneity at all; on the contrary, they have resulted in an increase in ethnic tensions. In the case of Poland, these were the most severe in Wołyń and Romania and within the areas of Transylvania. On the other hand, the reforms in Yugoslavia has brought about the improvement of agrarian infrastructure in poorer regions of the countries, while also resulting in the cultural antagonisms which came into play in the 90s of the 20th century.

Chapter 14 makes reference to the theoretical deliberations of Samuel Eisenstadt, a well-know sociologist of historical inclinations involved in the processes of civilisation development. Giordano analyses the latest transformations of the agricultural system in Bulgaria from the 90s of the last century, focusing readers' attention on the problem of the so-called *arendatori* – a group of new Bulgarian capitalists (farmers) often returning from the communist *nomenclature*. *Arendatori* leased land from the owners who got the land back.

As in the case of Romania analysed in Chapter 13, there has been a distortion of the original aim of the reform. Following its implementation, there was no actual distribution of wealth but a consolidation of the economic position of those who had been at the top of the social hierarchy in communist Bulgaria. Giordano not only shows the political mistakes here, but also

gives an example of imitative capitalism. The transition from a communist economy to a free market gave a possibility of growing wealthy. On the other hand, only those who managed to transfer their economic resources from the former system could make the most of this opportunity. Interestingly, the author indicates that the *arendatori* were very successful at establishing very profitable businesses, while having a positive impact on the development of their rural social environment, which seems to be another confirmation of the thesis that other capitalism in the conditions of peripheries is not possible.

To Giordano – referring to the perspective of the world-systems theory and advocating the combination of historical and sociological-anthropological views – the informality of social relations (specific to the countries of low social capital) and the imitative nature of modernisation clearly place Central and Eastern Europe within the peripheral areas. In this context, the case of Poland seems to be interesting being that it is sometimes considered a half-periphery⁶ for two distinct reasons. First, the Polish economy is competitive thanks to low wage costs. Ukrainian immigrants play an increasingly important part here with Ukraine becoming the periphery of Europe, characterised by a low level of innovation and providing Europe with cheap outsourcing services and intermediate products. Second, Poland is treated in the literature on the subject as a country which is simultaneously subordinate and dominant as half-peripheral⁷.

The context of subordination is related to three periods of its history – the 16th and 17th centuries, Partitions (1772-1918)⁸ and Eastern-bloc affiliation

⁶ Andrzej W. Nowak defines it as the area “...that is in decline, coming from around the centre or the one which would like to improve its position within the frameworks of the system. This is the buffer between the core and peripheries. Half-peripheries in the 16th century were Portugal, Spain and also Italy, southern Germany and southern France. Half-peripheries used peripheries, e.g. Spain and Portugal profited from their American colonies. However, they were used themselves too – the profits benefited England and northern France in exchange for highly-processed products (Nowak 2011: 128).

⁷ Traces of this proposed way of thinking can be found in the works by Wallerstein. Among the sources he used in the analyses are the works of Polish economic historians, with Marian Małowist and Witold Kula in the forefront. They described 16th and 17th century Poland as the country of strong economic dependence on Western Europe. These relations made Poland function as a periphery of the European world-system for a long time.

⁸ Between 1772 and 1795, the sovereign Poland ceased to exist because of the agreements concluded between its neighbours: Austria, Prussia and Russia (called the

(1945-1989) – and a lack of a strong body of the state stimulating economic development (imitative modernisation)⁹. On the other hand, the context of domination is related to a period of Polish history where Poles were invaders, hegemons and colonisers¹⁰.

Central and Eastern Europe as a postcolonial area

The other theoretical perspective offered by Christian Giordano for the analysis of social properties of the countries of Central and Eastern Europe is postcolonialism. We consider this approach to be more apt than the analyses encountered in relation to transformative and transitological studies. He also refers to self-colonial processes (cf. the category of internal European colonialism, Domańska 2008: 162 after Hechter 1975). According to the perspectives offered here, the countries of Central and Eastern Europe abandoned the role of peripheries of Moscow at the turn of the 21st century and accepted the role of the peripheries of Brussels. They transformed a hegemon and submitted to 'subtler' political and cultural influence, as well as the economic expansion of Western companies regarding which the unstable Eastern economies of the beginning of the 90s were a paradise for businessmen. Therefore, Giordano discusses here what Ewa Thompson calls

partitioners), which divided up its territory among themselves. The state only came into being again in 1918.

⁹ According to the afore-mentioned Andrzej Nowak, "in Poland, where kings were losing their power to the gentry, there was no strong state created specific to the structures of the core, there was no strong administration, nor the army. What is more, Poland exported wheat to Western Europe. Landowners obtained great profits thanks to cheap and half-slave labour of peasants; the obtained wealth did not cause structural changes. The money was spent on imported luxury goods and services from the states of the centre. Cities were underdeveloped (apart from the Hansa beneficiaries – Gdańsk and Toruń)" (Nowak 2011: 127).

¹⁰ The Polish "postcolonial moment" is related to the question of the actions of the First Polish Republic (the 15th-18th centuries) within the area of Eastern Borderlands. The policy of the 17th century Polish gentry in today's Ukraine is now discussed by some as an example of the colonial policy (Sowa 2011). Even today there are traces of these relations found in the political discourse, mostly when Poland considers itself the centre in relation to some countries, positioning itself as a leader of Central and Eastern Europe in the European Union (Borkowski 2006, Fiut 2003).

a search for the “surrogate hegemon” (Thompson 2008: 114), and what is “despotism based on protectiveness” according to Izabella Bukraba-Rylska (Bukraba-Rylska 2004: 116). in Giordano’s opinion, these influences are still visible and were confirmed by the imposition financial solutions on the countries as Greece after the crisis of 2008¹¹.

The author refers to various types of discursive practices applied by interpreters of the hegemony and subordination relation. For instance, he claims that Euroscepticism can be called a peripheral social knowledge and not an irrational reaction to ‘wealth’ coming from the West, but an awareness of one’s peripheral subordination. This mainly involves interpretations presented by the power elites in the countries of the former Eastern Bloc characterised by a kind of *postcolonial mentality*¹², described by Tomasz Zarycki (2008a, 2008b, 2009) as follows:

1. Focusing on the centre as significantly foreign; this is the main point of reference in social debates, especially as a model of the forms, behaviour and lifestyles considered adequate for people aspiring to high social status. Thus, the extent to which a certain object, fashion, behaviour or person satisfies European standards, how close it is to the model.
2. A disability (inferiority) complex in relation to the centre is often compensated by comparison with the “inferior stranger”. In this case the “inferior stranger” for Poland, comparing itself with the European Union, can be other countries of the Eastern Bloc; for instance, Ukraine or Belarus.
3. A tendency to define political divisions and other disputes in the categories of relations with the centre (the centre’s opponents vs. supporters of cooperation with the centre) and “the level of cultural centrality”; that is, cultural assimilation of central standards and

¹¹ Let us add here that additional interpretation possibilities concerning the issue of the former countries of the Eastern Bloc’ dependency on the Western countries appear due to their membership to the European Union. One good example here is Poland and reactions of the EU authorities to political and legal changes after seizing power (2014) by the right-wing political party (*Totalna...* 2016).

¹² The notion offered by the authors of this article and not used by Christian Giordano.

agreement with them. For instance, there are pro-European and anti-European politicians.

4. Identity tensions, especially concerning peripheral elites, between a sense of belonging to the centre and to the peripheries. "It is therefore hard to find an identity compromise between being a European and a Pole" (Bielska & Lis 2013: 54).

Obviously, Christian Giordano is not the first researcher postulating the introduction of postcolonial consideration to the analysis of the properties of the countries of Central and Eastern Europe. This type of discourse had already appeared in the literature on the subject (see for instance Moore 2001, Cavanagh 2003, Thompson 2000) and not exclusively for Hungary or Bulgaria, which are willingly mentioned by the author, but also for Italy (Lombardi-Diop & Romeo 2012). In our opinion, the case of Poland is an even better example of the postcolonial status of the countries of Central and Eastern Europe because it was subject to intensive colonisation processes already in the period of Partitions, not only in the initiative of the Russian Empire but the German Empire and the Austro-Hungarian Empire (Fiut 2003: 152, Zarycki 2008a: 31-32).

Although they are referred to the most frequently, the postcolonial relations between the Soviet Union and Poland in the period of 1945-1989 cannot therefore be considered the only ones. Undoubtedly, only in the last decade of the 20th century, the Polish position in relation to the countries of the centre was improved thanks to commonly known events called the political system transformation (dissolution of the Eastern Bloc, implementation of the principles of a democratic state and market economy resulting in accession to NATO and the European Union). However, has this not also meant an automatic change of its geopolitical, economic and cultural status? Or was it only a leap from the peripheries to the afore-mentioned half-peripheries originally designed for the countries as Spain or Italy?

Let us emphasise that we are still developing this approach according to the principles of imitative modernisation; an approach not only indicated by Giordano (who, for instance, uses the "peripheries of Brussels" expression) but by other researchers¹³. We compete with the countries of the centre –

¹³ The postcolonial position of Poland has been analysed even more broadly, not only in reference to Brussels (see for instance Gandhi 2008, Bukraba-Rylska 2004, Cavanagh 2003, Thompson 2000).

taken more broadly and not only limited to the states of the European Union¹⁴ – mostly through low labour costs in a not particularly innovative economy, while providing mostly outsourcing services. The Polish political system transformation has been similar to other reforms of this type called a “structural adjustment”, to take the jargon of international institutions (Harvey 2008).

Final remarks

Christian Giordano’s book, limited to only several chapters for the purposes of our essay, will surely attract the attention of those readers who would like to take the broadest view possible when scrutinising different social phenomena in their sociological deliberations. Although we find many vague, overly general or too downright expressions – treated as evidence because of their obviousness, formulated without necessary references to research studies, at least opinion polls¹⁵ – it includes many interesting analytical clues facilitating the discussion (mostly theoretical but not deprived of empirical references, including the author’s own research) on the complicated problems of Central and Eastern Europe.

There are some additional reasons why the book deserves readers’ attention. It emphasises the need of historical perspectives in sociological studies, placing one’s own research in a broader context. Furthermore, it encourages the readers to conduct their own further analysis. For instance,

¹⁴ Apart from several most economically powerful countries of the world, with the United States in the forefront, there are also international institutions indicated, as, for instance, the International Monetary Fund. It played a significant part in the transformations of the 90s of the 20th century in the countries of Central and Eastern Europe, pursuing the interest of mainly American financial circles.

¹⁵ For instance: *There appear to be no doubts on this point* (113), *We are all aware now* (114), *Currently, terms such as socialism [...] are ideologically and politically convenient words* (116), *Politicians and social scientist experts are still talking about* (117), *No one in Eastern Europe harbours illusions about the current peripheral status of their country. [...] There is a growing awareness...* (118). It is also hard to agree with the statement that *people’s revolutions are usually subject to a top-down control* (112). This blunt thesis is not that obvious from the perspective of social movement theory.

when the author extends the interpretation area of the problems of Central and Eastern Europe by the postcolonial perspective, there remains the question of how to measure the relationships we have discussed. Perhaps an interesting indicator of their extent and direction would be migration flows as these not only concern the movement of people from Africa to the countries of Western Europe but – and especially – the migration flows to the states admitted to the EU after 2004 from the countries of the former Eastern Bloc and former Soviet republics, which are not members of the European Union. The assumption here is therefore that the peripherisation or postcolonial perspective in this type of studies would certainly bring many interesting discoveries, especially in the context of the problems that Central and Eastern Europe seems to be causing Europe.

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New books and publications on the region

We encourage our Readers to inform the editorial team of new publications on the Central and Eastern Europe region and comparative works. Please send us your reviews of such works.

**Maria Halamska, Sylwia Michalska and Ruta
Śpiewak, 2017, *Studies on the Social Structure of Rural
Poland Volume 1: Old and New Dimensions of Social
Differentiation*, Scholar (publication in Polish)**

Rural Poland makes a significant part of the society as it amounts to as much as two-fifths of it. (...) Hence legitimate questions: who are the inhabitants of rural areas and what jobs do they do? What are the characteristics of their social status in relation to the rest of the society, including the urban part of it? To explore this issue we have to ask more questions – (...) what factors influence social differentiation of rural Poland and how does the rural Poland see itself against the background of the entire country? How does it see its internal differentiation? People's attitudes and their decisions are shaped by the perception of changes and evaluation of their own situation. This string of questions provides the outline for the research project entitled: "Struktura społeczna wsi i jej świadomościowe korelaty" [The social structure of rural areas and their correlates of awareness] funded by the National Science Centre. The hereby presented volume forms the first of the three publications planned as the outcome of the project.

A fragment from the Introduction

**Mark Shucksmith and David Brown, 2016,
Routledge International Handbook of Rural Studies, Routledge**

The Routledge International Handbook of Rural Studies examines the organisation and transformation of rural society in more developed regions of the world, taking an interdisciplinary and problem-focused approach. The Handbook is organised around eight emerging social, economic and environmental challenges: demographic change, economic transformations, food systems and land, environment and resources, changing configurations of gender and rural society, social and economic equality, social dynamics and institutional capacity, power and governance. Cross-cutting these challenges are the growing interdependence of rural and urban; the rise in inequality within and between places; the impact of fiscal crisis on rural societies; neoliberalism, power and agency; and rural areas as potential sites of resistance.

Rural population, economy and space still play a major role in producing national development and well-being. This book examines the organization and transformation of rural society in more developed regions of the world. Moreover, while the book's various chapters contribute to disciplinary knowledge of rural structure and change, they also provide a synthesis on various aspects of rural society, economy and environment. (...) All the developments [in the last decade] prompt new thinking about the role of rural people, communities and environments in relation to economic prosperity, food security, global warming, environmental degradation, energy exploration, social justice and human rights.

A fragment from the Introduction

Krzysztof Gorlach

Institute of Sociology, Jagiellonian University, Kraków, Poland

Rural Sociology at the Jagiellonian University in Cracow: Past and Present*

The 27th Congress of the European Society of Rural Sociology (ESRS) will take place on 24-27 July 2017. This year it will be held at the highly hospitable Jagiellonian University, the oldest university in Poland established in 1364. The decision of the ESRS authorities to choose Poland and, specifically, the Royal City of Kraków for this year's Congress is undoubtedly a great honour for the Polish community of rural sociologists, recognised as one of the biggest and most active in Europe. For nearly 100 years, the development of this subdiscipline has been driven by the major contribution of sociologists associated with the centre in Kraków, functioning mainly, albeit not exclusively, within the structures of the Jagiellonian University Institute of Sociology.

* The article was written by Professor Krzysztof Gorlach, one of the most prominent contemporary rural sociologists, author of numerous books and scientific articles, published, among others, in *Eastern European Countryside* (of whose Advisory Council he has been a member since 2013). To mark the organisation of the Congress in Kraków, we have addressed our esteemed colleague, as the current leader of the Kraków group of rural sociologists and Chairman of the Local Organising Committee of the 27th European Congress of Rural Sociology, to write a few words about the history of this subdiscipline at the Jagiellonian University.

In 1921 the idea to form a chair of ethnology and ethnography has been formed in the context of seeking for a proper candidate. It should be stressed that Bronisław Malinowski (18884 – 1942) has been perceived at that time as one among various potential candidates. However, he did not accept such a proposal because of his plans to analyse important research materials gathered earlier at the Trobriand Islands, as well as some ideas to organise another research trip to this region. As a result, in November 1922, Jan Stanisław Bystroń (born in 1894, died in 1964) was invited to become Professor of Ethnology at the Jagiellonian University. However, it was not earlier than in 1925 when Bystroń finally became the professor of ethnology and ethnography at the university.

Five years later the chair of ethnology and ethnography was transformed, following Bystroń's ideas, into the chair of ethnography and sociology. Therefore, Bystroń should be mentioned as a first sociologist working at the Jagiellonian University until 1934 when he moved to Warsaw University. However, he left the chair of ethnography and sociology at the Jagiellonian University in Kraków, which was distinguished among other academic scientific centres in Poland because of its specific area of scientific interests and studies. Such a peculiarity lies in the combination of sociology and ethnography with a singular stress on historical development and some connections to German, French and English traditions in terms of cultural studies.

In this context Kazimierz Dobrowolski (born in 1894, died in 1987) became a new Professor in the Chair of Ethnology and Sociology in 1935. What is important is that Dobrowolski developed not only the ethnological and sociological legacy established by Bystroń, but enriched the analysis with a historical perspective following the ideas of two distinguished historians: Stanisław Krzyżanowski and Franciszek Bujak. Therefore, on the one hand, sociology at the Jagiellonian University has evolved with its strong connection with an ethnographic perspective, while on the other hand, it has taken up a historical dimension.

World War II disrupted the functioning of the Chair of Ethnography as well as all the activities of the Jagiellonian University. However, already in 1945 (the end of the War) Kazimierz Dobrowolski started to renew the processes of teaching and conducting research in ethnography and sociology. He immediately met with major difficulties since, under the Stalinist ideology dominating in Poland from late 1940s until mid-1950s, sociology was recognised as so-called “bourgeois science”. The situation of ethnography had been a little better at that time since it had been recognised in a more “neutral” way, i.e. as a discipline focused mainly on traditional rural cultural patterns. However, as a result of de-Stalinization sociology after 1956 became once again a part of the university curriculum under the frame of Chair of General Ethnography and Sociology headed by Kazimierz Dobrowolski. Moreover, Dobrowolski organised the separate scientific unit; namely, the Chair of Sociology (again) and Demography headed by professor Paweł Rybicki. Both chairs became the backgrounds of the Institute of Sociology at the Jagiellonian University that has been established in 1970¹.

Basing on the ethnographic tradition rural studies became an important part of the research activities performed by persons working at the Institute of Sociology. One should notably mention some works by Kazimierz Dobrowolski that has been focused on the role of peasant culture in historical processes of change in Polish society². The main theoretical message resulting from Dobrowolski's considerations seems to lie in the assumption that to describe and understand the processes of social change we should take into considerations of all the dimensions of social life. Such a perspective has been called an “integral method” and has been formed as a crucial point of reference for rural studies in Poland (not only in Krakow and at the Jagiellonian University).

¹ Kwaśniewicz, Władysław (ed) 1989 Uniwersytecki ośrodek socjologiczny w Krakowie. Tradycja i współczesność (Sociological University Center in Kraków. Traditions and Present Times), Warszawa – Kraków: Państwowe Wydawnictwo Naukowe

² Dobrowolski, Kazimierz 1973 *Studia nad życiem społecznym i kulturą* (Studies on Social Life and Culture), Wrocław: Ossolineum;
Dobrowolski, Kazimierz 1973 *Teoria procesów żywiołowych w zarysie* (Theory of Spontaneous Processes in Brief), Wrocław: Ossolineum

Władysław Kwaśniewicz (born in 1926, died in 2004) has been a person who continued Dobrowolski's legacy. Therefore, he has conducted some research focused on the role of craftsmen in a peculiar rural community³. Such an analysis has demonstrated the role of mixed economic activities in rural communities. Moreover, in the early 1970s, Władysław Kwaśniewicz organised the team of researchers dealing with crucial issues of rural communities. In this team, Lucjan Kocik (born in 1944), Zygmunt Seręga (born in 1947, died in 2014) and Krzysztof Gorlach (born in 1954) should be mentioned. All of them conducted their research focused on rural issues. Lucjan Kocik did his research in the 1970s and 1980s and tried to explain the role of family in major changes of farming communities⁴.

In turn, Zygmunt Seręga conducted his research from the mid-1970s until the mid-1990s. Seręga's initiatives focused on rural communities, including the role of tourism (as a major factor of change in rural communities), as well as the presence of some local institutions (cooperative banks, local authorities and local economic organisations) in the process of rural community changes⁵. The last one has been an attempt to show the role of local institutional arrangements in major processes of rural community changes from the communist-type institutional framework to a more flexible democratic regime resulting from the political breakthrough of 1989. Seręga's studies on rural communities have been continued by Piotr Nowak who conducted research on the role of local elites in processes of rural development. His current study conducted with the financial support of the Ministry of Science and Higher Education has focused on the role of local

³ Kwaśniewicz, Władysław 1970 *Wiejska społeczność rzemieślnicza w procesie przemian. Studium socjologiczne wsi Świątniki Górne pow. Krakowskiego (1850-1960)* (Craftsmen Rural Community in the Processes of Change: Study on Świątniki Górne in the Kraków County (1850-1960)), Wrocław: Ossolineum

⁴ See: Kocik, Lucjan 1976 *Przeobrażenia współczesnej rodziny wiejskiej* (Changes of Contemporary Rural Family), Kraków: Ossolineum; also: Kocik, Lucjan 1986 *Rodzina chłopska w procesie modernizowania się wsi polskiej* (Peasant Family in the Process of Modernization of Rural Poland), Kraków: Wydawnictwo Uniwersytetu Jagiellońskiego

⁵ Seręga, Zygmunt 1993 *Czynniki rozwoju lokalnego* (Factors of Local Development), Kraków: Wydawnictwo Uniwersytetu Jagiellońskiego

entrepreneurs, representatives of local intelligentsia, leading farmers, etc. in the processes of local development in several selected rural communities⁶.

Starting in the early 1990s, Krzysztof Gorlach has tried to continue research traditions developed by Kwaśniewicz and Kocik with collaboration of Seręga and later with Piotr Nowak (born in 1967) and Grzegorz Foryś (born in 1974). Therefore, his first research initiatives have been focused on the concept of peasantry presented in the context of rural studies developed by Polish sociologists⁷. Later, however, his studies have been expanded into several areas of analysis.

First of all, the analysis of significance of family farming in the context of Polish agriculture should be mentioned⁸. In this study, based on the results of research conducted in the Małopolska region (southern part of Poland with the prevailing number of small family farms), some issues of defending farms as well as developing of various identities should be stressed. Secondly, Krzysztof Gorlach and Zygmunt Seręga have tried to broaden this area of interest – namely, family farming – into an international field. Therefore, they have been the editors of the important volume⁹.

This perspective was also enlarged in the international context following the international conference held in Krakow in late May 1995. It contained fourteen chapters concerning family farming issues in countries (beside Poland) such as the Netherlands, the United Kingdom, Bulgaria, Russia, the United States and Portugal. This period of the development of studies

⁶ Nowak, Piotr 2012 *Rozwój obszarów wiejskich w Polsce po integracji z Unią Europejską w opinii lokalnych elit* (The rural areas development after European integration in the local leaders opinion), Kraków: Wydawnictwo Uniwersytetu Jagiellońskiego.

⁷ Gorlach, Krzysztof 1990 *Socjologia polska wobec kwestii chłopskiej* (Peasant Question in Polish Sociology), Kraków: Universitas

⁸ Gorlach, Krzysztof & Seręga, Zygmunt 1991 *Chłopi we współczesnej Polsce: podmiot czy przedmiot procesów społecznych* (Peasants in Contemporary Poland: Makers or Outsiders of Social Processes), Kraków – Warszawa: Polskie Wydawnictwo Naukowe

⁹ Gorlach, Krzysztof & Seręga, Zygmunt (eds) 1995 *Family Farming in the Contemporary World: East-West Comparisons*, Kraków: Jagiellonian University Press

on family farming issues has been supplemented with two important studies focused exclusively on the issues facing family farms in the United States.

We have in mind here two volumes prepared by Lucjan Kocik as well as Krzysztof Gorlach. The first one has focused on farms operated by Polish origin farmers in the Mid-West region¹⁰. The second one has been developed as a kind of historical-sociological study focused on the history of family farming in the United States¹¹. In the last case, the author claims that the family farm might be perceived as one of the most important icons in the American history, while its development might be treated as a kind of struggle of the American tradition against the forces of industrialisation and globalisation shaping the conditions of the American economy and society.

Major changes in Poland after 1989 have brought some new themes and issues elaborated by rural sociologists at the Jagiellonian University. The first one was prepared by Zygmunt Seręga in his analysis of the conditions shaping some ways of local rural development. Basing on the mostly qualitative research in several mountain area communities in southern Poland, the author claimed the vital role of local institutions and local elites in the processes under his considerations. Such a study was continued about twenty years later by Piotr Nowak in his analysis of local development, stressing the roles of local elites as well as EU projects.

The consideration of Polish peasants (farmers) as an important social category became a topic of three consecutive studies conducted by Krzysztof Gorlach in the years 1994, 1999, 2007¹². The main analysis in these publications cover some fundamental changes occurring in rural Poland under the processes of post-communist transformation, including the issues

¹⁰ Kocik, Lucjan 1990 *Polski farmer w Ameryce: Studium przypadku stanu Wisconsin w USA* (Polish Farmer in America: The Case Study of Wisconsin), Kraków: Ossolineum

¹¹ Gorlach, Krzysztof 1994 *Obronić ducha Ameryki: kwestia rolna i socjologia wsi we współczesnych Stanach Zjednoczonych* (Defending the Spirit of Rural America: Agrarian Question and Rural Sociology in the United States), Kraków: Wydawnictwo Uniwersytetu Jagiellońskiego

¹² Gorlach, Krzysztof 1995 *Chłopi, rolnicy, przedsiębiorcy: „kłopotliwa klasa” w postkomunistycznej Polsce* (Peasants, Farmers, Entrepreneurs: the „Awkward Class” in Postcommunist Poland), Kraków: Kwadrat - Wydawnictwo Uniwersytetu Jagiellońskiego; Gorlach, Krzysztof 2001 *Świat na progu domu: Polskie rodzinne gospodarstwa rolne w obliczu globalizacji* (The World in my Backyard: Polish Family Farms in the Face of Globalization), Kraków: Wydawnictwo Uniwersytetu Jagiellońskiego;

of economic and cultural capital of investigated farms, the types of identities observed among farm operators, the types of class consciousness in the farming community and ways of defending farmers' interests.

This research had the character of a panel study enabling to follow the trajectories of farms between 1994 and 2007, i.e. in the key period of Poland's preparing and entering the European Union. Additional aspects of the analysis of these processes have been developed by Lucjan Kocik in his book about traumatic experiences and Eurosceptical tendencies observed among rural population in Poland in the process of major economic and social changes¹³. Moreover, Krzysztof Gorlach, Zygmunt Seręga and Zbigniew Drąg have prepared a similar investigation focused on the young rural generation in Poland and their attitudes towards the idea of European integration¹⁴.

Another important characteristic of scientific activities undertaken by rural sociologists at the Jagiellonian University might be the so-called political sociology of agriculture. It has focused especially on farmers' protests in Poland, treating them as a way of defending their interests while, at the same time, as a way of constructing new regime in the areas of agricultural and rural policies.

Krzysztof Gorlach and later Grzegorz Foryś have conducted some research focused on protests of Polish farmers after 1989 trying to follow this particular issue. The results of this type of analysis have been presented in different social and cultural as well as political contexts. First of all, they have been presented as a separate analysis of farmers' protests in Poland due to existing theoretical framework of social protests and social movements¹⁵. Secondly, they have been analysed as a part of a more international discourse

Gorlach, Krzysztof 2009 *W poszukiwaniu równowagi: Polskie rodzinne gospodarstwa rolne w Unii Europejskiej* (Searching for the Balance: Polish Family Farms in European Union), Kraków: Wydawnictwo Uniwersytetu Jagiellońskiego

¹³ Kocik, Lucjan 2001 *Trauma i eurosceptycyzm polskiej wsi* (Trauma and Euroscepticism in Rural Poland), Kraków: Universitas

¹⁴ Gorlach, Krzysztof; Seręga, Zygmunt & Drąg, Zbigniew 2003 *Młode pokolenie wsi Trzeciej Rzeczypospolitej* (Young Rural Generation of the Third Republic of Poland), Warszawa: Instytut Spraw Publicznych

¹⁵ Gorlach, Krzysztof & Foryś, Grzegorz 2002 'The Dynamics of Polish Peasant Protests under Postcommunism', *Eastern European Countryside* 8: 47-66

Foryś, Grzegorz 2008 *Dynamika sporu: Protesty rolników w III Rzeczypospolitej* (The Dynamics of Contention: Farmers' Protests in the Third Republic of Poland), Warszawa: Scholar

concerning the issues of democratisation in formerly authoritarian regimes observed in Latin America, South Africa as well as East-Central Europe¹⁶.

Rural sociologists at the Jagiellonian University have also been involved in various international projects. In starting to present this issue, we should mention the CORASON project as part of European Union 6th Frame Programme focused on the role of types of knowledge in the processes of rural development. This initiative was undertaken in the years 2004–2007 and resulted in several publications both in English and Polish concerning food regional products, natural resource management and the role of various types of knowledge in rural development, etc ¹⁷.

Moreover, this type of research has been extended to the multidimensional analysis of important roles of regional food products in the context of rural development ¹⁸. The issue of agri-tourism has been perceived as an alternative type of economic activities performed by farmers and other inhabitants in rural areas. It has been an object of extensive research conducted by Grzegorz Foryś. The main message of this research has been focused on the emergence of a peculiar social movement in rural areas focused on agritourist offers and activities¹⁹.

¹⁶ Foryś, Grzegorz & Gorlach, Krzysztof 2015 'Defending Interests: Polish Farmers' Protests under Postcommunism' in: Bert Klandermans, Cornelius van Stralen (eds) *Movements in Limes of Democratic Transition*, Philadelphia – Rome – Tokio: Temple University Press, pp. 316-340

¹⁷ Gorlach, Krzysztof; Adamski, Tomasz & Klekotko, Marta 2009 'Designing Nature and Resource Management Strategies' in: Karl Bruckmeier & Hilary Tovey (eds) *Rural Sustainable Development in the Knowledge Society*, Farham: Ashgate, pp. 187-202; Adamski, Tomasz & Gorlach, Krzysztof 2010 'One Tradition Many Recipes: Social Networks and Local Food Production – the Oscypek Cheese Case' in: Maria Fonte & Apostolo G. Papadopoulos (eds) *Naming Food after Places: Food Relocation and Knowledge Dynamics in Rural Development*, Aldershot: Ashgate, pp. 173-196; Gorlach, Krzysztof et al. 2007 *Wiedza w zrównoważonym rozwoju obszarów wiejskich (Knowledge in Rural Sustainable Development)*, Kraków: Wydawnictwo Uniwersytetu Jagiellońskiego

¹⁸ Gorlach, Krzysztof et al. 2016 'Local Food as an Agent of Regional Rural Development: Three examples from the Małopolska Region in Poland', *Socio.hu, Space and Society: Special Issue in English 4*: 160176 (Available : <http://www.socio.hu/uploads/files/2016en/gorlach.pdf>)

¹⁹ Foryś, Grzegorz 2016 *Gospodarstwa i stowarzyszenia agroturystyczne w Polsce. W poszukiwaniu ruchu społecznego (Agrotourist Farms and Associations. Searching for a Social Movement)*, Warszawa: Scholar

Moreover, it should be stressed that the issues of natural environment and its role in the processes of rural change in Poland have had a significant tradition among rural sociologists at the Jagiellonian University. In this context, one might mention the work by Lucjan Kocik focused, on the one side, on some relations between farms and society as well as their relations with nature on the other²⁰.

Following this pattern of scientific activity, the team of rural sociologists at the Jagiellonian University has been involved in the recent international research project under the HORIZON2020 EU program. The project under the SUFISA acronym has focused on the analysis of sustainable financing for sustainable agriculture and fisheries. Major research interest has been focused on the conditions, strategies and performances of farmers in different sectors and various countries. The completion of the project has been planned in April 2019. The project gathers thirteen academic institutions from eleven countries (Belgium, UK, Italy, France, Portugal, Greece, Latvia, Germany, Serbia, Denmark and Poland).

More recently, a major project concerning key changes in farming community in Poland has started with the support of National Science Center under the MAESTRO program. The project headed by Krzysztof Gorlach started in April 2016 and had been planned for 5 years. The title of the whole project is: "Think Locally Act Globally: Polish Farmers in the Era of Globalisation and Resilience" (UMO-2015/18/A/HS6/00114, el. PSP K/PBN/000032). The main idea of the project has been based on the reversion of the famous and well-known statement "Think Globally, Act Locally". We argue that farmers construct their business strategies by thinking about local conditions and the contexts of farming to act beyond the local to mobilise various resources to achieve success in their businesses.

The idea of the project is to analyse these strategies and their diversification across the whole country in various regions and sub-regions using multi-level analysis applied to a huge national sample containing at least 3000 units (farms). Moreover, some qualitative analysis is to be conducted based on in-depth interviews with some selected respondents (farmers and

²⁰ Kocik, Lucjan 2000 *Między przyrodą, zagrodą i społeczeństwem. Społeczno-kulturowe problemy ekologii wsi i rolnictwa* (Between Nature, Farm and Society. Socio-cultural problems of rural and agricultural ecology), Kraków: Wydawnictwo Uniwersytetu Jagiellońskiego

representatives of agricultural chambers) concerning the issues of life style, class identity, food safety and security, using information technologies as well as exploring ways of defending farmers' group interests.

The research team headed by Krzysztof Gorlach contains a few other members, namely: Dr. Zbigniew Drąg (hired as a database manager), Martyna Wierzba-Kubat, M.A. (hired as a research assistant, working in collaboration with Piotr Nowak) who is responsible for analysis of food safety and security and information technologies issues and Dr. Adam Mielczarek (hired as a post-doc) who is responsible for analysis of class and life style issues. Moreover, the research team has been supported by two foreign experts called "external theorising evaluators"; namely, Jan Douwe van der Ploeg (Wageningen University, the Netherlands) and Patrick H. Mooney (University of Kentucky, Lexington, USA).

Krzysztof Gorlach

**Reception and scientific significance of the “Polish method”
in sociological studies on the 100th anniversary
of the publishing of *The Polish Peasant in Europe
and America* (W.I. Thomas, F. Znaniecki) and the 80th
anniversary of the publishing of *Młode pokolenie chłopów*
(*The Young Generation of Peasants*; J. Chałasiński).**

The year 2018 marks two anniversaries significant not only for Polish sociology, i.e. the 100th anniversary of the publishing of *The Polish Peasant in Europe and America* by William Isaac Thomas and Florian Znaniecki (Boston, 1918), and the 80th anniversary of *Młode pokolenie chłopów* (*The Young Generation of Peasants*) by Józef Chałasiński (Warsaw, 1938).

Needless to say, particularly the former work turned out to have an absolutely revolutionary effect on sociology world-wide, as it introduced new theoretical concepts, methodological ideas and empirical material, while its authors approached challenging problems that sociology was unable to address at the early stages of its development and which it sometimes fails to face up to even nowadays. The latter publication, although never translated in its entirety into a foreign language and thus not so well-known abroad, is recognised as one of the most outstanding achievements in Polish sociology. The both works set the model standards, so far unrivalled by any other, in terms of the use of autobiographical data in sociological research, while the methodological rules governing how to deal with such material, developed by Chałasiński, Thomas and Znaniecki, are globally known in sociology as the *Polish method*.

In order to commemorate and first and foremost to recall these two important sociological works and their authors, we would like to partially devote the next issue of our periodical (24'2018) to the reception and scientific

significance of their concepts, both from the historical and contemporary point of view.

All those interested, including our authors, readers and contributors, are welcome to submit their scientific articles, studies and other research papers related to the subject matter, methodology and research method proposed and developed in *The Polish Peasant in Europe and America* and *The Young Generation of Peasants*, with the deadline until 31 October 2017.

The Editorial Board and Advisory Council of *Eastern European Countryside*

In Memoriam of Professor Zbigniew Tadeusz Wierzbicki (1919-2017)



Professor Zbigniew Tadeusz Wierzbicki's long life that came to an end on 7 June 2017 was a balanced and these days rare blend of personal virtues of an outstandingly righteous and noble man, his recognised and practically verified research activity, and his unselfish organic work for the society, the nation, and the Polish state.

Professor Wierzbicki was a retired UMK professor who worked in the Institute of Sociology of the Nicolaus Copernicus University (UMK) in Toruń between 1982 and 1994 and previously in the Institute of Philosophy and

Sociology of the Polish Academy of Sciences. He was brought up in a family with rich patriotic and public-spirited traditions (his father was an officer in the First Brigade of the Polish Legions, a volunteer-medic, while his mother came from the family of Wacława Peretiatkowicz, the founder of a famous school for girls in Kiev.) His personality was strongly influenced by a junior high school in Rydzyna run by Tadeusz Łopuszański. At home as well as at school he learnt a positivist ethic of work at the grassroots level.

A leading Polish rural sociologist, who continued traditions of rural science that were begun in Poland by Władysław Grabski and Franciszek Bujak (among others he authored some works devoted to the Żmiąca village that refereed to F. Bujak's monograph from 1903. "*Żmiąca. Wieś powiatu limanowskiego. Stosunki gospodarcze i społeczne*" [Żmiąca. A village in the Limanowa District. Economic and social relations.]). His academic work was appreciated globally - he was invited to lecture at the universities in France and the United States. As a man of science, he was always guided by the principle of action and research, bringing together practical activities and academic work in three areas: (1) activation of local communities, (2) tackling alcoholism, (3) environmental protection.

At the end of the 1960s and at the beginning of the 1970s, as a sociologist he developed (jointly with Alvin L. Bertrand, an American sociologist) the theoretical basis for activation and development of local communities and social environmental science (created in the 1990s). They form the basis of a fundamental paradigm of rural development operating under the name of revitalisation of rural areas that was developed in Poland by his students from Toruń. Its principles provided the foundations for the programme of local communities' development that is being implemented nowadays in social practice in many European countries under the name of "Rural areas renewal".

In 1992-2005, he supported the Eastern European Countryside as a member of its Advisory Council.

He was a prominent public-spirited activist. He began his social activities already at a very early age. In autumn 1939, when he was only 20, together with his mother he organised secret courses at the secondary school level. In the period from 1 October 1939 to 30 September 1941, the school operated

underground. With the connivance of a district school inspector from Puławy the school broke cover and until 1944 it was run as a secondary School of Trade. He lectured there on cooperatives and, unofficially, on Poland's history. Additionally he looked after an illegally operating school's scout group.

In 1946-1947, he worked in Wrocław's branch of Polski Związek Zachodni [Polish Western Union], where he engaged in defending indigenous people persecuted by looters who took advantage of impunity resulting from the support they received from a corrupted local administration and officers of the secret political police. Fearing for his life, professor Wierzbicki left Wrocław.

His social sensitivity demonstrates itself in his commitment to the environmental protection movement. He was a leading activist of the green movement in Poland. He was awarded the title of "The Patron of Nature" by the Stowarzyszenie Pracownia na rzecz Wszystkich Istot [Workshop for All Living Creatures Association]. He was also awarded and honoured by The Nature Preservation League and Polski Klub Ekologiczny [Polish Eco Club], and he was summoned to testify as an expert in social aspects of environmental protection by public administration and other bodies. Alongside his academic activity in sociology of environmental protection, he also promoted knowledge about the environment. In 1993, he became a member of Environmental Protection Committee affiliated with the President of Poland's office, he was a member of the Academic Board of the Board of Directors at The Nature Preservation League (in 1977-1982, he served as its vice-chairman).

Since 2001, he had funded and published a bimonthly periodical called "Bunt Młodych Duchem" [A rebellion of the young at heart] which he also edited. The periodical raised political, historical, and environmental issues as well as those related to outlook on the world and current affairs, especially in Poland, presenting them in the spirit of respecting human rights, social dialogue, particularly with neighbouring nations, dialogue between religions, and improving selfgovernance and environmental protection.

Selected works:

- *Agribusiness – wyłaniająca się nowa gałąź amerykańskiej socjologii wsi* [Agribusiness - a new emerging branch of American rural sociology] (1968)
- *Badania amerykańskie nad aktywizacją społeczności lokalnej* [American research into activation of local communities] (1969)

- *Socjologia wsi w Stanach Zjednoczonych: stan i tendencje rozwojowe* [Rural sociology in the United States: current state and development tendencies for the future] (1970, jointly with Alvin L. Bertrand)
- *Ewolucja rolniczych spółdzielni produkcyjnych w uprzemysłowionym regionie* [Evolution of agricultural cooperatives in industrialised regions] (1970)
- *Ochrona środowiska naturalnego wsi* [Protecting the natural environment in rural areas] (1973)
- *Gaeki – zespołowe gospodarstwa rolne we Francji* [GAECs – collective agricultural enterprises in France] (1975)
- *Ochrona krajobrazu w socjoekologicznej perspektywie* [Landscape protection in social and environmental perspective] (1980)
- *Ekologia człowieka a sozoekologia społeczna* [The ecology of human being and social environmental science] (1982)
- *Aktywizacja i rozwój społeczności lokalnych i środowiskowych* [Activation and development of local and environmental communities] (1987)
- *Socjologia wsi we Francji* [Rural sociology in France] (1994, jointly with Placide Rambaud)
- *Dimitrie Gusti: socjolog niepodległej Rumunii* [*Dimitrie Gusti: A sociologist of the independent Romania*] (1999)
- *Sozoekologia społeczna: główne problemy, materiały, rozwiązania* [Social aspects of environmental science: main issues, documents, solutions] (2008)

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