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## **PREFACE**

The present thematic volume of Acta Innovations is devoted to different areas of innovation in rural areas, especially social ones.

The articles published in the journal are based on papers presented during the 16<sup>th</sup> Convention of the Polish Sociological Association in September 2016. The final form of the volume is the result of discussions as part of the group “Innovations in rural areas: new opportunities for development or the danger of marginalization?” conducted by Prof. Hanna Podedworna from Warsaw University of Life Sciences (SGGW), Dr. Katarzyna Zajda from University of Lodz and Dr. Ilona Matysiak from Maria Grzegorzewska University. The group was organized in cooperation with the Section of Rural and Agriculture Sociology of the Polish Sociological Association.

The volume consists of ten articles. In the first of them, Hanna Podedworna discusses the subject of changes in the importance of different innovations in rural development. The main purpose of her paper is to analyse how the new network model of innovation is being created and what groups of social actors participate in the process of change. In her opinion, these actors are farmers, NGOs, public and local government officers, as well as entrepreneurs.

The other texts refer to the role of individual and collective actors in the implementation of different kinds of innovation in rural areas and entrepreneurship of rural residents.

Katarzyna Zajda writes about the cooperation between non-governmental organizations and other local entities in the context of implementing social innovations. In the paper, she points to the need to improve cooperation between NGOs and the public sector, and to persuade public sector entities (especially communal offices) to implement the innovations.

Ilona Matysiak focuses on the innovativeness of young rural residents. Her paper is concerned with checking whether the young and educated rural inhabitants supply their local communities with new products, services and distribution methods atypical of the rural environment. The author mentions some correlates of young people's innovativeness defined this way, such as originating from a particular village, having family social capital, experiencing city living and specific motivations accompanying the decision to live in rural areas.

Ilona Matysiak is also the author of a text devoted to the innovativeness of older rural residents. In this article, she explores the potential of elderly people living in rural areas in terms of implementing social innovations related to care provision. The article is based on a literature review and in-depth interviews conducted in the Netherlands in 2017.

The text by Anna Wrona concentrates on urban to rural migrants. In her opinion, the influx of urban to rural migrants can carry innovation, but only under certain conditions, and its extent is usually limited. Based on her research, she concludes that the influx of urban to rural migrants seems to be less a source than the catalyst of innovation in the rural culture.

Małgorzata Dziekanowska discusses the problem of activity of rural women, pointing to innovations designed to improve the quality of life in local communities, to identify their needs and social problems, and to make attempts to address these.

The present volume also includes articles on the importance of innovation in agritourism (by Maria Miczyńska-Kowalska) and the relationships between social innovations and the social economy as illustrated by the example of activities undertaken in the last decade in the rural commune of Bałtów from Świętokrzyskie voivodship (by Kamila Hernik). There is also a paper on co-operative research as a scientific innovation and a new research paradigm, contributed by Wojciech Goszczyński, Piotr Stankiewicz, Sandra Karner and Nicoleta Chioncel as the effect of collaboration in an international project entitled "Facilitating Alternative Agro-Food Networks – Stakeholder Perspective on Research Needs" (FAAN) funded within the 7th EU Framework Programme. Eventually Barbara Szczepańska presents "Social Factors in the Implementation of Agricultural Development (On the Example of Lower Silesia)".

The editors of the volume and the authors would like to thank the organizations whose support has made its publication possible, such as the Rural Development Foundation and the Association of Polish Rural Communes and all anonymous reviewers.

We hope the papers included herein will be of interest for the readers, especially those who perceive the implementation of various innovations in rural areas as the opportunity for rural development.

Editors

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## **INNOVATIONS IN RURAL SPACE: FROM MODERNISATION TO NETWORK INNOVATIONS**

### **Abstract**

The process of globalization has fundamentally changed the significance of innovations in the development of rural areas. The modernisation paradigm in agriculture has been replaced by the post-productivist regime, which means a change of the innovation order. The linear diffusion of the innovation model is being replaced by a network, endogenous model. The former concentrated on adaptation of innovations and operated at the macro-social level; the latter focuses on processes of social learning of innovation and on the creation of hybrid social networks at the micro-social level. In the modernisation paradigm, innovations were created outside of the agricultural sector. In the endogenous model, the significance of social innovation and participation of different social actors are crucial. The main purpose of the paper is to analyse how the new network model of innovation is being creating and what groups of social actors participate in the process of change.

### **Key words**

post-productivist paradigm, territorial frame of innovations, linear innovation model, network innovation model, rural development, social innovations

### **Introduction**

The question formulated in the title emphasizes changes in the innovation model in rural development processes, indicating changes from the linear to the network model of innovations. Innovations are necessary for the stimulation of development processes. This pertains also to the development of the food economy and of rural areas, which developed in the past their own, autonomous innovation system. This situation was caused by the lack of interest on the part of institutions that implement innovation in the transfer of technologies to agriculture and in the modernisation of rural areas. The policy of the state supported rural development and modernisation projects and financed agricultural innovations taken from the broader social surrounding.

The changes observed in the social context of agricultural innovations, caused by population growth and escalated urbanization processes [1], require an integrated approach to agricultural innovations and a redefinition of the term “agricultural innovation system,” which was hitherto identified with “agricultural extension”. In the 1980s, the paradigm tying innovation to technology was subjected to criticism and replaced by a participation paradigm involving farmers in cooperation with experts. A report from the World Bank, an institution important for supporting the diffusion of rural innovation processes, names six structural changes redefining the social context for innovation in agriculture. They are as follows:

- “1. Markets, not production, increasingly drive agricultural development.
2. The production, trade, and consumption environment for agriculture and agricultural products is becoming more dynamic and evolving in unpredictable ways.
3. Knowledge, information, and technology is increasingly generated, diffused, and applied through the private sector.
4. Exponential growth in information and communications technology has transformed the ability to take advantage of knowledge developed for other purposes.
5. The knowledge structure of the agricultural sector in many countries is changing markedly.
6. Agricultural development increasingly takes place in a globalized setting” [2].

Structural changes need social innovations, which are crucial for social participation, information and knowledge exchange. It is observed that innovations may create positive externalities and be an instrument preventing negative externalities, such as environmental pollution in agricultural production and food economy [3: 11]. In rural development discourse, social aspects and problems become the centre of interest. The focus is

on social innovations which are of key importance for solving rural development problems observed in regions with aging populations and declining agriculture. This requires new ideas and solutions that technical innovations do not offer. Similarly, one could find new solutions to urban problems, such as unemployment and obesity, if one made use of the agricultural advisory services experience. This would make it possible to construct new patterns of rural-urban relations.

The problems of food safety and health hazards have become the heart of public debate, which has affected CAP (Common Agricultural Policy) reform. The European Commission has published numerous reports [1, 3] analysing the system of innovations and agricultural knowledge. The reports document a need to introduce changes and describe what these changes should consist of.

The purpose of this paper is to describe how a new model of innovation is being created and what social actors participate in it.

### **Conceptual Framework**

The previous linear agricultural innovation model, oriented mainly towards agricultural production increase, does not satisfy the needs of contemporary farmers and does not provide a solution to the challenges of sustainable development of rural areas. In the discourse on rural development, one observes a change of the paradigm and a turn from the modernisation paradigm towards sustainable and multifunctional development. This results in the formulation of new social expectations towards agriculture, which should not only feed the growing population, but should also reduce the adverse impact on the natural environment. Smart, sustainable and inclusive growth requires a new network innovation model and a greater focus on social innovations. Due to the complexity of agricultural innovations, new mechanisms that could stimulate development thereof are required, and such mechanisms are provided by hybrid social networks.

Institutional changes caused by the application of new technologies [3: 21] contributed in the 1980s towards the popularisation of the term “social innovations”. Social institutions change very slowly, since some stakeholders are interested in performing their routine functions and in maintaining the *status quo*. Technical innovations do not solve these problems. The new, endogenous approach to innovations requires the mobilization of local resources and capacity building. The CAP reform and the cross-compliance rules introduced in the EU make access to agricultural subsidies dependent on the implementation of good practices for the benefit of the environment, animal welfare and quality of rural life. This includes the attainment of objectives connected with rural development and the production of public goods, and not only an increase in agricultural production.

As Bettina Bock contended, the notion of social innovation was created as a result of criticism of the traditional understanding of innovation, which was limited to technology, goods, scientific knowledge and economic viability [3: 47; 4]. In the context of rural development, it includes social objectives, which are necessary and desirable to assure the survival of rural communities and meet the challenges of sustainability. However, the notion of social innovations, although commonly used in the context of rural development, is polysemantic and contains a certain normative meaning. The situation is much simpler when one speaks of the development of agriculture, where one still uses the notion of technical innovations referring to product and process innovations. Rural development leads to changes in the social and socio-economic system and is connected with profound social changes [3: 52].

The term “social” in the context of innovations is interpreted as:

- “- the social mechanisms of innovations,
- the social responsibility of innovations, and
- the innovation of society” [4: 57].

Referring to the notion of social innovations, one often emphasizes their links to social inclusion, social cohesion and social capital. The following, often cited in the literature, defines social innovations formulated by the Center for Social Innovation at Stanford University, and may serve as an example of the above, as it names and accentuates these social effects of innovation:



“Any novel and useful solution to a social need or problem, that is better than existing approaches (i.e., more effective, efficient, sustainable, or just) and for which the value created (benefits) accrues primarily to society as a whole rather than private individuals” [5].

Social innovations are defined in a similar manner in EU documents.

### From the linear towards an integrated network innovation approach

The postulate of constructing networks and strengthening interactions in education-research-innovations triangle [3: 14] has been included in the EU modernisation agenda. This problem is as complex as the modernisation of agriculture used to be, and therefore requires an interdisciplinary approach.

The main differences between the linear and network integrated innovation models are presented in Table 1.

Table 1. Two views on innovation policy

	Mainstream macro-economics	Institutional and evolutionary economic systems of innovations
Main assumptions	Equilibrium Perfect formation	Disequilibrium Asymmetric information
Focus	Allocation of resources for invention individuals	Interaction in innovation processes Networks and frame conditions
Main policy	Science/Research policy	Innovations policy
Main rationale	Market failure	Systemic problems
Government intervenes to	- provide public good - mitigate externalities - reduces barriers to entry - eliminate inefficient market structures	- solve problems in the systems - facilitate creation of new systems - facilitate transition and avoid lock-in - induce changes in the supporting structure for innovation: create institutions and support networking
Main strengths of policies designed under this paradigm	Clarity and simplicity Analysis based on long-term trends of science-based indicators	Context specific involvement of all policies related to innovation
Main weaknesses of policies designed under this paradigm	Linear model of innovation (institutional) framework conditions are not explicitly considered	Difficult to implement Lack of indicators for analysis and evaluation policy

Source: Ruud Smits, Stefan Kuhlmann and David Shapiro: *The Theory and Practice of Innovation Policy*, 2010, in: [3: 15] [4]

As presented in the Table 1, both models stress different mechanisms and groups of social actors involved in innovation processes. A reference to social mechanisms in the integrated network model emphasizes the involvement of various actors in solving rural development questions, i.e. those already at the stage of creating innovations, and not only at the stage of their diffusion. It is common knowledge that innovations are firmly rooted in culture and social relations, which is well illustrated by the term socio-technical innovations that emphasizes the inseparability of these two aspects [7]. The social responsibility of innovations involves preventing market failures, the satisfaction of social needs and making assessments with respect to the winners and losers of innovation. This is particularly important in the context of rural development, since certain technical innovations which are profitable for farmers, such as GMOs, are harmful to the natural environment and encounter social resistance. Sustainable development requires socially accepted innovations which are beneficial for the planet, and not only profitable to a small group of producers [8, 9]. Solving many social questions in which social innovations can be used would mean profound changes in values, behaviours and action patterns, which can be accomplished only if rural development processes are accepted and not met with social resistance.

As Bock pointed out: “The construction and introduction of new technologies always involves changes in the interaction of ‘things’ (artefacts), actors and ‘ways of doing’ (institutions) and affects and is affected by how society is organised and functions” [4: 58].

### **Process of Creation and the Essence of the Network Model**

In the 1960s, advisory services and academics used the term agricultural knowledge system (AKS) to organize and illustrate the relations shaped in accordance with the linear innovation model – from science towards practice [3: 23]. Scientific research in the field of agricultural studies was conducted to modernize agriculture, and at that time it was the principal objective of the interventionist agricultural policy. Many European countries developed a closely interconnected system of public scientific institutions and extension services, laying the groundwork for cooperation under the direction of the ministry of agriculture. In the 1970s, institutions such as OECD and FAO supplemented the term adding an “I”, which initially stood for “information”. Subsequently, “information” was replaced by “innovation” and thus the term agricultural knowledge and innovation system (AKIS) was coined [3]. This was not only a change of name. It reflected a wider scope of transformations taking place in agriculture, the organization of education, extension services and market liberalisation. It illustrated changes in the linear innovation model and its replacement with the participative network model. The network model makes it possible to include all stakeholders, and to create networks and an integrated innovation model. Such a change was also fostered by the privatisation of extension services, farmers’ participation in the costs of using these services, as well as by environmental objectives and the problems of life and work quality of rural dwellers becoming points of interest of rural development policy.

Agricultural policy began to support the positive externalities of agriculture, which were questioned with respect to industrial agriculture. It caused a discrepancy between a farmer’s knowledge and the knowledge offered by science and extension services.

A generally recognized formal definition of AKIS is “a set of agricultural organizations and/or persons, and the links and interactions between them, engaged in the generation, transformation, transmission, storage, retrieval, integration, diffusion and utilization of knowledge and information, with the purpose of working synergistically to support decision making, problem solving and innovation in agriculture” [9 in 3: 23]. It can be noticed that this definition relies on a sectoral approach, making use of the term “agriculture”. In a more recent report [3: 24], the term “rural” was already used, which may be interpreted as a broadening of the understanding of the term “innovations”. This is connected with the acceptance of a territorial perspective in studies on innovations in rural spaces and with accentuating social purposes. It is emphasized that this is a sign of the rejection of the linear innovation model [3, 4, 8] and of the emergence of the network paradigm, which better reflects the challenges of sustainable development.

In the network paradigm, the group of actor-participants of the innovation process is expanded to include both individual as well as collective actors from outside science and advisory services. Farmers, NGOs, public and local government officers, as well as entrepreneurs act in support of sustainable rural development. New groups of actors bring different interests, objectives, values and expectations into the network. Interactions and relations between the participants of this process are of key importance for information exchange and innovation learning. Currently, innovations are not only narrowly understood productivist objectives, but are also used to implement public goals. Their creation and diffusion are decided by financing mechanisms, institutional infrastructure, social networks and market structure. Social networks may have various structures and may focus on local, state or global networks. The term *LINSA (Learning and Innovation Networks for Sustainable Agriculture)* describes the networks, coalitions for innovations, configurations, and Private-Public Partnerships [3: 25]. The network innovation model emphasises social creation and knowledge sharing between various actors, which makes it possible for previously marginalized, niche actors to be included in the networks. In addition, various rural development support systems, such as banks and institutions that finance and pursue rural development policy, as well as producers’ associations, have also been included in the network. Although this causes problems with coordinating operations, it also allows for the creation of innovations.

The learning process is vital for obtaining of satisfactory results and can take various forms, including imitation and joint activities.

Changing the innovation model means broadening the notion of innovation and including social, organizational and marketing innovations. Actions covered can be undertaken in various spheres of social and economic life and are not limited to the sphere of agricultural production and services. Public discourse has been enhanced by new notions exceeding the previous discourse frames, such as food safety, public health, alternative food production and distribution networks, and the vulnerability of global markets.

### **Social innovations as a rural development driver**

Shaping a new innovation model reinforced the connection between rural development and social innovations, and new factors decisive for their diffusion appeared. As researchers assert [see 10: 37], previous work on this topic looked to answer what social innovations were, paying less attention to the determinants of their diffusion, involvement of social actors and the meaning of social innovations in rural development processes. More recent papers discuss these issues [10, 11, 12] and indicate the connection between social innovations and rural development. This connection consists of the building, activation and use of endogenous resources, which can be used to solve social problems found in a given region, to improve the living conditions of rural dwellers, and to cause positive social effects which will be beneficial for the entire community, and not only for selected individuals. The development of cooperation and social networks empowers endogenous social resources. According to Neumeier, indispensable conditions of a successful social innovation are:

- “1. it is innovative with regard to the user, context or application;
2. it meets needs more effectively than pre-existing alternatives;
3. it provides long-term solutions; and
4. it is adopted beyond the initial group/network that developed it” [10: 35].

As follows from the above, whether a new solution is successful is decided both by its novelty as well as its diffusion and the scope of its impact, which depend on collective learning, communication and coordination processes. Thanks to these processes, new social actors participating in rural development processes, located both in the rural space and beyond, are included in the cooperation network.

Reviewing the literature enables us to isolate three kinds of factors decisive for social innovations being successful [10: 37]. They include factors decisive for the course of the innovation process isolated by Rogers [13], such as the exchange of information between various actors and the perception of innovation subjectively defined as a novelty. The second group comprises factors determining the actor network manoeuvre space outside of the innovation process. These factors shape structural capabilities and limitations resulting from the social context, culture, legal system and organizational structure. They may be conducive for rural development or be a source of barriers. Factors rendering social innovations successful are described more often than barriers [10: 38]. Overcoming these barriers requires the participation of institutions managing rural development processes in networks and making use of past experience of collective efforts. If there is no such experience, it is difficult to initiate the process of innovation. The third group of factors include those that affect the actual participation process. The factors described are inter-related, and it is not always possible to separate them.

Another important component is the social diversification of the innovation recipients, i.e. farmers and rural dwellers, with respect to such socio-demographic variables such as gender, age, relationship to agriculture – professional (main source of income) or hobby (a life style element), and the character of agricultural practices – conventional, organic, sustainable. Categories of farmers demonstrate different attitudes towards innovations and have various access to the system of innovations. Innovation support is most often dedicated to large, intensive farms and designed in such a manner that other farmers are excluded from the system [3: 30], since state institutions are not interested in supporting them.

As Neumeier contends: “at an individual, community and regional level, social innovations are at the core of neo-endogenous rural development and as such an important prerequisite for its success” [10: 37].

The progress of the diffusion of innovations process also depends on the type of innovations. The Oslo-Manual, a frequently cited source, names four types of innovations: product innovations, process innovations, marketing innovations and organizational innovations [14: 31-35].

Social innovations that are the subject of this paper could be classified as organizational innovations, but the remaining types of innovations connected with the rural areas economy, both with the agricultural production sector, as well as with the area of the developing services economy, are also important for rural development. Changing the context of agricultural innovations and forming a new innovation order have been described by Brunori and collaborators [11]. They highlighted the role of regulations introduced on the food market and the values of consumers to which farmers react.

### Conclusions

Treating social innovations as a panacea to all rural development issues is problematic [15]. A single social innovation can be successful, but its social effects could be unexpected. The success of social innovations in rural development, as pointed out by Neumeier [10], depends on many factors external and internal to rural areas. Internal factors, such as the commitment and creativity of rural communities, are incapable of being controlled by external institutions. This results in a sceptical assessment of the potential of rural policy with respect to the intentional initiation or steering of rural social innovation process, although it is capable of creating space for actions of various actors involved in innovation networks. Social innovations have different social effects in regions rich with resources where they can be conducive for creating new resources and mobilising internal development potentials. In such regions, social innovations increase the adaptation capabilities and provide new development opportunities. Social innovations will, however, have different consequences in peripheral and marginalized regions where they can prove to be too weak of an impulse to foster development. Many rural regions are poor in internal resources, so it is hard to believe that social innovations and a new network model of innovations will be effective. A strong dependence on the social context shows how difficult it is to formulate general recommendations with respect to the better use of social innovations in the processes of rural development.

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## **NON-GOVERNMENTAL ORGANIZATIONS' COLLABORATION WITH LOCAL ENTITIES AND THEIR POTENTIAL FOR IMPLEMENTING SOCIAL INNOVATIONS**

### **Abstract**

Non-governmental organizations encounter some barriers when trying to implement social innovations, such as having limited ability to collaborate with other entities designed to solve social problems or limiting that collaboration to entities which are not interested in implementing such innovations. The aim of this article is to characterize the collaboration between non-governmental organizations from Lubelskie Province and local entities, as well as to evaluate the collaboration in terms of the possibility of implementing social innovations. The study was carried out between October and December 2016 and was based on the following research questions: 1. What kind of social problems do the investigated non-governmental organizations from the rural communes of Lubelskie Province try to solve? 2. What entities are involved in solving those problems? 3. Do the investigated organizations often collaborate with them? 4. Should the collaboration be modified or changed? 5. What entities should increase their participation in the cooperation network? The study involved 108 chairpersons of non-governmental organizations from the rural communes of Lubelskie Province, with whom in-depth interviews with a standardized list of targeted information were carried out. The article presents part of the collected empirical material. Although non-governmental organizations are willing to engage in non-standard, unconventional or atypical projects, they limit their activity to problems regarded as "easier to solve" or to activities that are not likely to solve those problems. In this context, extending non-governmental organizations' cooperation networks by new local non-governmental organizations (out of the social welfare field) does not seem as desirable as their further collaboration with public sector organizations based on the principle of partnership and oriented at implementing social innovations.

### **Key words**

rural non-governmental organizations, collaboration, social innovations, Lubelskie Province

### **Introduction**

Although social innovations do not have a single, commonly recognized definition, different theoretical approaches include elements such as solving social problems or satisfying social needs, conducting activity that is atypical and unconventional in comparison with activities commonly carried out in the area, availability, and having a non-commercial character [1: 5, 19; 2:12-17]. These properties point to the attributes of organizations which might be interested in implementing social innovations, including actively solving social problems (or satisfying social needs) and being ready to implement unconventional, atypical or alternative activities that are different from those that have been performed locally before. Those attributes can be found in organizations that represent the public or the social sector (much less likely, the economic one). We may suppose non-governmental organizations are particularly interested in implementing such innovations. First, they mostly concentrate on solving social problems and satisfying social needs. Second, they approve of novel and atypical activities more than do public (governmental, regional, and local) institutions. Third, since those organizations are assumed to be less profit-oriented, they do not estimate their activities with consideration of maximizing profits and minimizing costs like economic sector organizations do. In other words, they do not reject in advance any atypical, unconventional or alternative activities because they do not give financial profit. Fourth, non-governmental organizations may be more inclined than public or economic sector organizations to engage in activities dedicated to the problems of minorities [see 1: 27-32].

However, the non-governmental organizations sector has its weak points, which may be a barrier to implementing social innovations. The aims of the article are:

1. To characterize the collaboration between non-governmental organizations from rural communes of Lubelskie Province and other local entities.

Therefore, the following questions will be answered: 1. What kind of social problems do the investigated non-governmental organizations from rural communes of Lubelskie Province try to solve? 2. What entities are involved in solving those problems? 3. Do the investigated organizations often collaborate with them? 4. Should the collaboration be modified or changed? 5. What entities should increase their participation in the cooperation network?

2. To evaluate the collaboration between the studied non-governmental organizations and other entities in terms of the possibility of implementing social innovations.

### **Non-governmental organizations' collaboration with other local entities and the implementation of social innovations in rural areas.**

Non-governmental organizations encounter some barriers when trying to implement social innovations, such as their limited ability to collaborate with other entities designed to solve social problems or to satisfy the residents' needs. In addition, they tend to limit collaboration to entities that are not interested in implementing such innovations [see 3]. It is argued in source literature on innovations that their implementation is more probable in collective structures, such as different social networks that allow the accumulation of human, social and financial capital [4; 5; 6; 7;8]. According to Agnieszka Rymsza, participation in social networks counteracts the fragmentation of activities taken by non-governmental organizations, promotes their coordination, and improves their effectiveness [9: 31]. Heterogeneous networks may also counteract the barriers to implementing social innovations that result from differences in the organizational culture of entities from public, social and economic sectors [cf. 1:30-32]<sup>1</sup>. In other words, belonging to a network of social sector organizations may increase the interest of public sector organizations in implementing non-standard, atypical and unconventional solutions. On the other hand, public sector organizations may motivate social organizations to engage in long-term activities. The role of the public sector in implementing social innovations is changing because of cooperation with social organizations being perceived as the unending source of inspiration for the public sector, which may initiate the implementation of social innovations [10:11].

Non-governmental organizations that operate in Polish rural areas can establish collaboration with many local entities engaged in solving social problems or satisfying social needs. These are local authorities and institutions related to them, such as communal social welfare centers, schools, communal culture centers, other non-governmental organizations (including traditional ones, such as farmers' wives' associations), local entrepreneurs, and social economy entities such as social enterprises.

As shown by the results of research carried out by KLON/JAWOR Association, Polish non-governmental organizations (both from urban and rural areas) most often contact with local authorities (in 2015, this was declared by 92% of the studied non-governmental organizations) and other non-governmental organizations (also declared by 92%) [11: 85]. Collaboration between local authorities and non-governmental organizations (pursuant to the Act of 24 April 2003 on Public Benefit Activity and Volunteerism, Article 5, item 1) [12] may have the form of delegating public services to non-governmental organizations, informing each other of the planned directions of activity, consulting with non-governmental organizations regarding the drafts of normative acts connected with the organizations' statutory activity or public services, forming common

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<sup>1</sup> Other barriers to implementing social innovations are: 1. Low human capital resources of organization members (e.g., low level of education, competencies and social skills, low creativity and knowledge of the needs or problems of the community), 2. Low social capital resources (e.g., reluctance to join associations, preference for individualistic values) [13; see 14], 3. Commercialization of organizations, defined by Agnieszka Rymsza as *a process in which non-governmental organizations become more and more dependent on activity typical of the for-profit sector, as a result of which they adopt market priorities and methods of operation, thus becoming quasi-market institutions, in fact leading to functional expansion of the market* [9: 63]. According to that author, commercialization results in competition between organizations themselves and between organizations and companies, which is reflected in a focus on receiving profit and obtaining funds for the activity, standardization/certification of services and products, offering them mainly to the beneficiaries that can pay for them, aiming to prove their effectiveness, or the use of professional assistance in organization management [9: 63-64].

<sup>2</sup> Further, the organizations contact local communities, public schools, kindergartens, sports centers, and companies [11: 15].

advisory and initiative-taking teams, local initiative performance agreements, partnership agreements specified in Article 28a section 1 of the Act of 6 December 2006 on the principles of development policy, or partnership agreements specified in Article 33 section 1 of the Act of 11 July 2014 on the principles of implementing coherence policy programmes financed as part of the 2014–2020 financial framework.

In the light of recent research carried out by KLON/ JAWOR Association, the most frequent form of knowledge-based collaboration between local authorities and non-governmental organizations is consultation of various types (in 2014, 39% of Polish non-governmental organizations declared participation in consultations), and rural non-governmental organizations are especially satisfied with this form of collaboration [11: 88, 90]. This is somewhat puzzling, especially in the context of perceiving them as highly dependent on local authorities, or even referring to them as “symbionts of local administration” [15: 55]. According to scholars, these organizations are sometimes the reflection of local authorities [16:15-16], which seem to collaborate with them but actually control them in full<sup>3</sup>. These organizations are considered to have a high level of governmentalization, understood as dependence on local authorities and other public institutions. Agnieszka Rymśa argues that the governmentalization of non-governmental organizations is manifested in adopting the priorities imposed by local authorities or public institutions regarding the choice of beneficiaries of support or the type of services offered, lowering the cost of services in response to requirements formulated in tender proceedings concerning the performance of public services, subsiding to the pressure to achieve quick, visible and measurable results, closely observing bureaucratic requirements and project budgets, and failure to engage in risky activities (such as social innovations) [9:91-92].

As Katarzyna Górniak argues, problems of Polish non-governmental organizations concerning the collaboration with the public sector are the consequence of problems concerning collaboration within the third sector. In her opinion, those organizations are not willing to join larger structures (which is called federalization) that could more strongly influence the public sector in terms of the forms of collaboration and its actual content [17:26]. Yet, the potential of intrasectoral collaboration of non-governmental organizations is clearly increasing. Recent research by KLON/JAWOR Association, involving a representative sample of Polish non-governmental organizations shows that in 2014, 92% organizations had contacts with other foundations and associations (for 33% of them, such contacts were lasting and regular), whereas ten years before, such contacts were declared by 66% of the entities [11:96].

Non-governmental organizations' engagement in collaboration with other local entities is caused by many factors, including the objective of each non-governmental organization. Believing that different local entities can help achieve that objective, the organization will choose the ones that in its opinion can contribute more to the collaboration than the others can. What kind of social problems do the investigated non-governmental organizations from rural communes of Lubelskie Province try to solve? What entities are involved in solving those problems? Do the investigated organizations often collaborate with them? Should the collaboration be modified or changed? What entities should increase their participation in the cooperation network? How can we evaluate the existing cooperation networks in terms of the possibility of non-governmental organizations implementing social innovations? Answers to these questions were sought in the research project “Social innovation systems in rural areas. Perspectives of public sector and non-governmental sector entities from Lubelskie Province”<sup>4</sup>. The goal of the project was to identify the role of the public and NGO sector in implementing social innovations and to characterize potential determinants of the implementation of social innovations in Lubelskie Province. This article presents part of the collected empirical material<sup>5</sup>.

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<sup>3</sup> On the other hand, even this superficial collaboration may cause mutual benefits. According to Lester Salamon, for the public sector it may mean a kind of assistance in satisfying local needs, and for non-governmental organizations it means the elimination of problems connected with “amateurishness” [18: 30-33, see 19: 134].

<sup>4</sup> The project was financed with a specific subsidy for activity involving research and development and related projects promoting the development of young scholars employed at the University of Lodz and doctoral students in 2016.

The original definition of social innovations adopted in the study was: intentional changes in the area of solving social problems, involving the development of social practices different from the typical ones.

<sup>5</sup> The study was also the basis for the article: “Current vs. Preferred Collaboration Network of Communal Social Welfare Centers from Lubelskie Province as a Determinant of Implementing Social Innovations”, submitted for printing in “Polityka Społeczna” journal in March 2017.



**Methodology of original study and characteristics of the research area and study sample**

The study whose results will be presented in the article was carried out between October and December 2016. The study sample was 108 chairpersons of non-governmental organizations from rural communes of Lubelskie Province included in the database of non-governmental organizations purchased from the Statistical Office in Lublin. When preparing the study sample, we only took into consideration the organizations that had published their phone numbers. An active phone number was necessary to perform in-depth interviews with the chairpersons using the standardized list of targeted information. This technique asks the respondents individualized questions, adjusted to the specificity of the conversation and their cognitive capabilities, at the same time ensuring the standardization of the scope of information to find [20]. The technique was chosen because the respondent group was quite varied, made up of representatives of different non-governmental organizations and managers of communal social welfare centers. We present part of the collected empirical material in the article.

The initial sample was 580 organizations. Interviewers made attempts to contact all the organizations to arrange and perform the interviews (at least three attempts on three different days of the week and at different times, including evening). However, 303 phone numbers from the database were wrong. The interviewers either reached other people unrelated with non-governmental organizations, or the phone numbers did not work at all. Therefore, the sample was reduced to 277 organizations. During the study, the three interviewers managed to contact 200 organizations, and 108 of the respondents agreed to participate.

The choice of the province in which the study was carried out was motivated by its specificity. It has the highest proportion of people employed in agriculture, and 96.2% of its surface area is rural. The inhabitants of the province face many social problems. In the Social Policy Strategy of Lubelskie Province for the Years 2014 – 2020 poverty was identified as one of the most acute problems. The Lublin region has a poverty risk index of 30.7%, which is the highest in Poland. It is here that the highest proportion of families benefit from social welfare [21:9-12]. Another problem is the aging population of Lubelskie Province and the low participation of elderly people in social and professional life. It was emphasized that it is a region with the highest proportion of people of post-productive age in the whole population, and 55% of the elderly live in rural areas [21:18]. The province has the highest population of disabled people in Poland. Those people experience different aspects of social exclusion, especially if they live in small towns or villages [21:30]. The low level of social and civic activity of province residents was also pointed out. In this context, it was observed that *non-governmental organizations, especially in rural areas, are not strong and competent enough to inspire, initiate and carry out social activities to engage local residents* [21:44]. The strategy also points to the issue of weaknesses of the social economy sector [21:49] and the highest level of emigration from Poland.

The second factor that motivated the choice of the province was the author's analysis based on data for the year 2014, available from Central Statistical Office database, concerning its characteristics that demonstrate its marginalization. The indicators used were the total unemployment rate, the net migration rate per 1,000 people, the proportion of people who were granted social benefits due to poverty per 100 beneficiaries, and dependency ratios (the proportion of all people of non-working age per 100 persons of working age and the proportion of people of post-working-age per 100 persons of working age). The analysis provided the basis for a ranking of marginalization of Polish provinces. Lubelskie Province had the lowest rank, determined by the values of three out of the five analyzed indicators, such as the net migration rate per 1,000 people, the total unemployment rate, and the proportion of all people of non-working age per 100 persons of working age.

In the study presented in this article, we assumed that the variety of social problems of rural residents may be a catalyst for implementing social innovations.

In the studied population, there were no persons under 24, and 9% were aged 25-34. Besides, few people over 65 were the chairpersons of non-governmental organizations in the Lublin region. The majority of the respondents were in the age groups of 35-44 (36.7%) and 45-54 (31.2%). Most respondents had higher or secondary education. More than 8 out of 10 (84%) were professionally active. Most of the others were retired / pensioners.

The respondents were members of organizations targeted at different social problems (further discussed in the next section). The organizations had quite a high level of professionalization, as indicated by participation of

organization members/workers in training sessions connected with their activities. Three-quarters of the respondents declared that in 2015 some members/workers of their organizations took part in such training. A second indicator of professionalization was planning investment in training of members/workers in the following year. 70% of the respondents declared that such investments would also take place in 2017. A third indicator was employing workers. Almost 1/3 of the respondents declared that their organizations had employed workers in the previous year (2015). In addition, more than half of the respondents declared that the organization's statutory activity was continuous.

Despite an effort put into the formation of the “real” sample, we did not manage to carry out the study using a representative sample of non-governmental organizations located in rural communes of the Lubelskie Province, which makes it impossible to generalize the conclusions from the sample to the whole population. Many organizations included in databases of the Statistical Office in Lublin and other similar offices had simply discontinued their activity without informing the office, or suspended their activity until they could obtain financial resources, or postponed the decision about discontinuing the activity. Most chairpersons of those inactive organizations did not agree to participate in the interview, explaining it with the fact that the organization was “dormant”, as they called it. Interviews were carried out with the chairpersons of organizations that were active, which meant at least that the chairperson who represented it answered the organizations' phone.

### **Cooperation between Lublin non-governmental organizations and other local entities**

In the light of respondents' opinions, the greatest social problem faced by the residents of the communes they represented was unemployment. This view was shared by 66% of all the participants. In their opinion, other social problems were less important. Every third respondent mentioned alcoholism and other addictions, as well as limited opportunities for children and adolescents to spend time out of school in an organized way. One fifth of the respondents also mentioned poverty and little interest among residents in matters concerning the commune. Very few people considered domestic violence, disability, family disintegration, migration, children's undernourishment or the educational exclusion of children and adolescents as the most important problems faced by the commune residents.

The hierarchy of the most serious problems of commune residents mentioned by the respondents in the communes where the organizations operated was only partially reflected in the profile of their activity. In other words, the hierarchy of the most serious local social problems might suggest that the organizations will take actions to activate the unemployed, to counteract alcoholism and other addictions, to help the addicted persons and their families, and to improve opportunities for children and adolescents to take part in organized extra-curricular activities. However, half of the non-governmental organizations studied declared that the main profile of their organizations' activity was to solve the problem of children and adolescents having insufficient opportunities to spend free time in an organized way, which was considered as one of the vital problems of the commune residents. Almost 35% of the studied organizations attempted to counteract educational exclusion of children and adolescents, though it had not been identified as one of the most important problems of commune residents. The studied organizations also provided assistance to elderly people (this profile of activity was declared by 14% of the participants), and few organizations tried to solve the problem of alcoholism and other addictions or reduce the effects of poverty, unemployment and disability. The fact that the respondents relatively rarely identified alcoholism, poverty and unemployment as problems targeted by their organizations resulted from the view that solving those problems was not the responsibility of non-governmental organizations, but primarily of professionalized institutions administered by local authorities (e.g., communal social welfare centers). The respondents pointed out that it was easier for non-governmental organizations – with their activists and volunteers – to organize spending free time for children and adolescents than to offer services dedicated to alcoholics such as therapeutic workshops that require professional knowledge. The discrepancy between declarations concerning the most important social problems and the profile of activity of non-governmental organizations seems to result from the specificity of the organizations, determined by the qualifications and competencies of people engaged in their activity.

Local organizations in the same commune as the participating organization that attempt to solve the most serious social problems were communal social welfare centers (mentioned by 83% of the respondents) and local authorities represented by the commune head and the council (mentioned by 80%). The third position in the ranking of entities assisting residents in solving their problems was taken by entities administered by local

authorities, such as schools and communal culture centers (mentioned by 62% of the participants). These were followed by local non-governmental organizations (mentioned by 56% participants). Other entities were the Church (mentioned by 31%) or local action groups (20%). Only 8.5% of respondents stated that social enterprises made attempts to solve local social problems, which is related to the low number of those entities in the communes where the non-governmental organizations represented by the respondents operated.

Collaboration with all those organizations was declared by as many as 90% of the participants, and the collaboration potential of other local entities in terms of solving social problems was regarded as lower than that of the organizations they represented. Three-quarters of the respondents believed other local entities collaborated with each other to solve social problems. Regardless of the form of collaboration, nearly half the respondents wanted some changes in the relations between the entities engaged in them. First, the changes would involve the introduction of the partnership principle (43.8% of the respondents who declared the need for change expressed this view) and the formalization of collaboration (this was the view of 31.3%). Thus, as the respondents declared collaboration with different local entities in solving social problems, perhaps because of the pursuit of social approval or the interviewer effect. They could see the need for change in relationships between the collaborating entities. The lack of such changes may generate conflicts in the future, which may lead to a change concerning the number and kind of entities collaborating to solve local social problems, especially that non-governmental organizations and local authority-based institutions often have completely different organizational cultures, which may make it difficult to understand each other's needs<sup>6</sup>.

Slightly more than a half of the respondents declared that some new entities should join the group of social problems-solving entities, such as non-governmental organizations (mentioned by 51% of the respondents who declared the need of activation of new entities), entrepreneurs (mentioned by 33%), public institutions, such as schools, communal culture centers (mentioned by 31%) and social enterprises (mentioned by 10%). The lack of interest in collaboration with social enterprises was due to their tendency to concentrate solely on activity connected with market survival and ensuring a source of income for their members. This makes them similar to market organizations, only working for profit, which are hard to engage in networks of cooperation aimed at solving social problems. Second, the respondents often lack knowledge of their functioning and ignore the social dimension of those cooperatives. Cooperative members, experiencing the risk of social exclusion in the past, may share their knowledge, skills and competence with people who are experiencing social problems and work as models in the network of entities that try to solve local social problems.

It is interesting that the respondents emphasize the role of non-governmental organizations in solving local social problems, especially considering that almost all of them share the opinion that NGOs should be willing to take up non-standard, unconventional activities different from the ones taken before if they feel those activities may help reduce a certain local problem. In the interviews, some of them provided examples of such locally non-standard activities taken in the past by the organizations they represented. One of those was a scholarship programme for children raised in foster families. This is how one of the respondents related the activity: "It is the only programme in Poland for adolescents, mainly from foster families. The rules of this scholarship programme allow us to help adolescents regardless of their school performance. It covers junior high school students and older teenagers who make an effort to achieve the grade average over 4.5. We initiated the programme in collaboration with the Stefan Batory Foundation. We presented our idea, and they invited us to collaborate with them, claiming that they had never encountered such a scholarship. They saw it as something that may have measurable effects. And it does. This is one of such obvious activities. It's our original idea. And as far as I know, at the moment it is the only one." In other words, the respondents attributed great importance in implementing social innovations to the non-governmental sector.

## **Conclusion**

The aim of the article was to characterize the collaboration of non-governmental organizations from Lubelskie Province and to evaluate it in terms of the possibility of implementing social innovations in rural communes.

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<sup>6</sup> The word "often" is motivated by the fact that non-governmental organizations are also varied in terms of organizational culture. Some of them, especially those that have undergone the governmentalization process, become similar to public institutions, and the ones that have undergone the professionalization process become similar to market organizations working for profit [23].

Based on source literature, it was expected that the barriers encountered by non-governmental organizations when trying to implement social innovations may be their limited ability to collaborate with other entities designed to solve social problems or satisfy the residents' needs, and second, limiting that collaboration to entities that are not interested in implementing such innovations.

One third of the organizations studied are professionalized, meaning that they had employed workers in the previous year (2015). Three-quarters indicated that in 2015 some members/workers of their organizations had taken part in training sessions connected with their activity, and 70% declared that such investments would also take place in 2017. The responses suggest that the organizations collaborated with many local entities, both from public and social sectors.

It is important that nearly half the respondents proposed changes in the collaboration, involving the introduction of the partnership principle and the formalization of the collaboration. The fact that the need for partnership principle was reported shows that one of the entities always has a privileged position in the relationship. Usually, this is the entity connected with the public sector described in the literature as not very inclined to implement social innovations. This sector is also perceived by the respondents as predestined to solve the most serious social problems of commune residents. Respondents' statements show that although non-governmental organizations are willing to take up non-standard, unconventional or atypical projects, they limit their activity to problems regarded as "easier to solve" or to activities that are not likely to solve those problems. In this context, extending non-governmental organizations' cooperation networks by new local non-governmental organizations (out of the social welfare field) does not seem as desirable as their further collaboration with public sector organizations based on the principle of partnership and oriented at implementing social innovations. In other words, the factor that may help implement social innovations in rural communes where the non-governmental organizations studied operate is strengthening their real cooperation with the entities of the public sector and persuading them to implement those measures. The strong point of non-governmental organizations is likely their openness to social innovations understood this way and a quite high potential of collaboration with other local entities. The weak point, on the other hand, is ignoring the most important social problems, which can be completely justified in the context of available human resources. Collaboration with the public sector could contribute to seeking solutions to the most acute social problems in rural communes and implementing them based on the experience, competence and skills of persons working in organizations, such as communal social welfare centers.

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## **INNOVATIVENESS IN THE ACTIVITIES OF YOUNG RURAL INHABITANTS WITH HIGHER EDUCATION<sup>1</sup>**

### **Abstract**

The aim of this article is to analyse the professional activity and social engagement of young rural inhabitants with higher education and establish to what extent their activity is innovative. The article is based on qualitative research derived from 74 in-depth interviews with rural inhabitants aged 25-34 with higher education. As the research illustrates, innovativeness is present in the activities of few people. Innovativeness is correlated with originating from a particular village, having family social capital, experiencing city living and specific motivations accompanying the decision to live in rural areas.

### **Key words**

innovativeness, young adults, education, rural inhabitants

### **Introduction**

The aim of this article is to analyse the professional activity and social engagement of young rural inhabitants with higher education. This article investigates the extent to which they carry out innovative activities, such as those that are unique for a given local environment and differ from the typical economic and social initiatives carried out in rural areas. The article tests the hypothesis that young village inhabitants with higher education can become “pioneers” that introduce innovations into their rural communities.

The issues covered in this article are important in the context of the future of rural Poland and their potential for development. Young generations are of key significance during deep systemic transformation as they have potential to support or even direct change [1: 122]. The extent to which young rural inhabitants wish to be active participants in such processes is an open question. The analyses are also important for the discussion of the significance of endogenous resources in developing rural areas. Using local resources creatively requires rural inhabitants to have certain knowledge and skills. Implementing concepts such as multifunctional or sustainable rural development, including creating non-farming jobs, and developing recreational or residential functions in rural areas requires such knowledge and skills. This is especially relevant if these concepts are to be implemented by local communities themselves in a bottom-up process [2]. In that context, young rural inhabitants holding higher education qualifications are a particularly important group for the future of rural areas in Poland, especially in the direction of development and creative use of local resources by rural communities.

First, a brief review of earlier research on young, well-educated rural inhabitants in Poland is presented, followed by a discussion of the research problem and methodology used to obtain the empirical data. After a concise characterisation of the young, educated rural inhabitants who were interviewed, the paper presents the results and analysis.

### **Young rural inhabitants with higher education – literature review**

The subject of young rural inhabitants in the context of structural changes had previously been raised within Polish sociology both in the interwar period and during the People’s Republic of Poland (PRL). Studies before 1989 indicate an imbalance between students originating from rural areas and those from cities, mainly from the intelligentsia – a tendency existing since pre-war times and increasing in the period of the PRL [3]. The

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research also paints the picture of the countryside as an environment uncondusive to using cultural capital acquired by academic studies [4], or where such possibilities are subjectively perceived as unattractive [5, 6]. In the pre-war period, a university graduate of peasant origin usually became a priest or a village teacher, which meant losing affiliation with the peasant class [5]. During communist Poland, easy access to education for the masses, mostly at the primary, secondary and vocational levels, caused young rural dwellers to develop aspirations associated with city living standards. Most of them were striving to move to the city [6]. Despite the proclaimed educational equality and the introduction of preferential points awarded for peasant origin, the number of rural youths among students of higher education institutions remained substantially low [3]. Higher agricultural schools which were expected to become a powerhouse for educated human resources necessary for the modernised farming, breeding and production sectors were an exception. However, as was the case with other higher education institutions, graduates of agricultural schools from peasant families rarely returned to their villages, perceiving them as places deprived of prospects for upward social mobility [7].

Research carried out after 1989 has studied rural youths (teenagers), thirty-somethings with varied levels of education, young farmers and students of higher education institutions originating from rural areas. It draws attention to the fact that the share of those with higher education among young people (under 34) running family farms is increasing – from 2.1% in 2003 to 8.9% in 2009 [8: 206]. However, it needs to be pointed out that contemporary rural youths are only marginally interested in working in agriculture [8]. Research on contemporary students and graduates of rural origin shows that young rural dwellers tend to choose higher education institutions with easier admissions procedures. They also tend to choose courses leading to specific professional qualifications like teaching. About 30% of graduates originating from rural areas return to their home villages [9]. Graduates of the most prestigious higher education institutions<sup>2</sup> are the least keen to move back to the countryside. This does not result from unconditional rejection of the village as a place to live, but from a pragmatic belief that the knowledge and skills acquired may be put to a more satisfying use in the city [2].

However, there is not enough research on young rural inhabitants with higher education, especially people who decided to live in the countryside after finishing their studies. Even if we were to assume that there are few graduates of the best Polish higher education institutions among them, they will still constitute the local rural elite in the future. For this reason, it is worth studying them and their professional and social activity. The question about the innovativeness of such activities is important for the development of rural areas in Poland.

### **Research problem: innovativeness and higher education**

Innovativeness means the ability of individuals, communities and whole societies and economies to create broadly defined innovations. It is conditioned by the resources possessed and the ability to participate in the processes of creating, implementing and absorbing innovations [10: 45]. Referring to individuals, Rogers [11: 260-261] highlights a positive relationship between innovativeness and level of education, as well as high educational aspirations and intelligence. These are not the only factors positively correlated with innovativeness, but the relationships mentioned above are some of the strongest. It can therefore be anticipated that young graduates living in rural areas will turn out to be capable of innovative activities.

To verify this hypothesis, an analysis of professional activity and social engagement of young rural inhabitants with higher education was conducted. The analysis was guided by the following research questions: 1) To what extent are the economic and social initiatives innovative? 2) What factors may be conducive for innovative activities of young rural inhabitants with higher education?

As far as economic initiatives are concerned, Schumpeter's [12] classic definition of innovation will be a point of reference extending to technical, technological, marketing and organisational changes. It can refer to introducing a new product, a novel production or sales method or opening a new market, among other things. This paper is concerned with checking whether the young and educated rural inhabitants supply their local communities with new products, services and distribution methods atypical of the rural environment. In the case of social engagement of young rural inhabitants, a theoretical point of reference is constituted by the cultural and social definition of innovation [10]. According to that definition, innovation is an idea that is

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perceived by a given individual or group as novel [11]. It is a vehicle for change in a group, institution, organisation or community, because the previous state of affairs is replaced with a new one [10]. Innovative ideas, projects and initiatives aimed at solving a local problem, improving the living conditions of the inhabitants of a given locality or addressing needs previously unnoticed will be of particular interest to this article.

### Research methodology

The empirical data analysed in the text are derived from 75 individual in-depth interviews with young adults (aged 25-34) who graduated with a BA or BSc or an MA or MSc. The research is focused on young adults as this is the age when youthful aspirations are fulfilled, decisions to start a family or establish a stable relationship are taken and choices important for shaping the “life strategy” of an individual (location, profession) are made. It is a time of confronting one’s own expectations and perceptions with the requirements of particular life situations [13: 16-17]. The notion of “rural inhabitant” is not limited to people of rural descent – it potentially extends to people of urban descent who decided to move to the countryside after finishing their studies.

The interviews were carried out in eight purposely chosen rural municipalities located in four historic macro-regions (western and northern areas, former Prussian, Russian and Austrian partitions). This made it possible to account for differences, such as those associated with agricultural structure and traditions of social engagement [14]. The municipalities selected for this research are part of districts characterised by a relatively higher share of inhabitants with higher education within their provinces.<sup>3</sup> Secondly, they include “agricultural” municipalities (with more than 60% of the municipality’s area being farming land according to the 2010 National Agricultural Census) and “tourist” municipalities (e.g. located in the vicinity of a nature park, nature-related tourist attractions, cultural or heritage monuments). Thirdly, all of them are located at least 80 km away from a city with a population over 100,000 inhabitants.

Two municipalities located in districts with a relatively high percentage of inhabitants with higher education were selected in each macro-region – an “agricultural” municipality and a “tourist” municipality, i.e. municipalities possessing the resources important for the local labour market and the concepts of multifunctional and sustainable development of rural areas (Table 1).

Table 1. List of rural municipalities selected for the research.

Region	Western and Northern areas		Former Russian partition		Former Prussian partition		Former Galicja (Austrian partition)	
Type of municipality	agricultural	Tourist	agricultural	tourist	agricultural	tourist	agricultural	tourist
Municipality	Pęcław	Walim	Gzy	Mokobody	Krzyków	Wijewo	Moszczenica	Gródek nad Dunajcem
District	głogowski	wałbrzyski	pułtuski	siedlecki	koniński	leszczyński	gorlicki	nowosądecki
Province	Dolnośląskie		mazowieckie		wielkopolskie		małopolskie	

Source: Author’s

Between eight and ten interviews with young adults with higher education were carried out in each municipality. The first interviewees were indicated by “competent local informants” (local authorities, village representatives (*sołtys*), local civil servants, leaders of local social organisations), while others were identified via snowball sampling. The research was carried out between June and September 2016 as part of a research project entitled “The role of cultural capital of young rural inhabitants in the contemporary processes of transformation of rural areas in Poland”. The project was funded by the National Science Centre based on the decision no. DEC-2013/11/D/HS6/04574. The interviews were transcribed and coded using MAXQDA 12

<sup>3</sup> When creating the concept of this research, it was assumed that it would be possible to directly compare the share of inhabitants of rural municipalities with higher education against the comparative data for rural areas in a given province. When the research was being carried out, the data from the 2011 National Census concerning the education of Poles was only available at the NUTS-4 level (district or higher) but not at the NUTS-5 level (municipality).



software and subjected to qualitative analysis. The results of the research are not representative for all rural municipalities in Poland, but purposeful selection of municipalities for the research makes it possible to make generalisations limited to certain local contexts.

### **Interviewees' characteristics**

The interviewees comprised 52 women and 23 men. About half of the men and women belonged to each of the categories of over 20 year olds and over 30 year olds. Most interviewees, particularly men, originate from villages where they currently live. Their parents and grandparents often come from these places, too. Therefore, the interviewees are usually well rooted in their respective local communities. Most women interviewed were married with children, a few women had informal relationships and ten women were single. As many as 11 out of 23 men were unmarried and did not have partners.

Most interviewees held an MA or MSc: 32 women and 14 men. It is worth pointing out that men tended to leave higher education with a BA or BSc degree more often than women. My interviewees were often the first ones in their families to obtain higher education. Some of the most popular areas of study included education / special education / physical education with a teaching specialization (16 women and six men), management (six women and two men), and public administration (five women and three men). 14 interviewees (eight women and six men) graduated from technical faculties, such as land management and planning, geodesy, transport, ICT, and production engineering. Only a handful of interviewees studied disciplines directly related to agriculture.

As few as one third of the interviewees (15 women and 11 men) moved to a city for the whole duration of their studies or a significant part thereof. The others graduated from local higher education institutions located relatively close to where they lived and commuted or graduated from extramural programmes of studies. A popular model included obtaining a bachelor degree at a local higher education institution (mostly State Higher Schools of Vocational Education) and then studying for a graduate degree at a larger academic centre. In the latter case, Pedagogical, Life Sciences and Economic Universities were amongst the most popular. In a few isolated cases, some more prestigious institutions were chosen, such as the University of Science and Technology in Cracow, the Adam Mickiewicz University in Poznań, Poznań University of Technology or the University of Warsaw.

### **Innovative economic initiatives of young rural inhabitants**

Nearly all interviewees work. Most of them are employed in local public institutions (municipal public offices, cultural centres, social welfare centres, schools). A few people are carrying out internships subsidized by district employment offices or are employed on replacement employment contracts. Two men and three women work on their family farms, and in two cases they also run an agritourism business. Nine interviewees (four women and five men) run or co-run their businesses (women jointly with their husbands). Ten interviewees said that they were considering starting their own business in the future and a few others mentioned they had had such business in the past.

Ten women and five men mentioned their own business currently being carried out or ideas for such initiatives. Most of them concerned new services: English language courses for rural children and adults, a small animal veterinary clinic, a motorcycle repair point, a dry cleaner with ironing services, a sexologist therapy practice addressed mainly at people with intellectual disability and LGBT people, an agritourist company and wedding planning. The interviewees pointed out that these services were clearly lacking in the local community and people were bound to be interested in them. Only in the case of wedding planning, one female interviewee had concerns whether the introduction of such services in rural areas was not premature and whether people from the local community would be happy to pay for something which they currently organise themselves. However, it needs to be pointed out that only five people already run the businesses mentioned above: a female interviewee from the Mazowsze region who launched English language courses, a male interviewee from Małopolska who has been successfully running a veterinary clinic for a couple of years, a male interviewee from Małopolska and a male and female interviewee from Lower Silesia who run agritourist businesses in their villages. The remaining interviewees talked about ideas for the future, while two female interviewees revealed ideas which they considered to be dreams rather than real plans (a care home for the elderly, a crèche).

A few people mentioned interesting experiences from their own businesses in the past. A female interviewee from the Krzymów municipality in Wielkopolska ran a snail farm together with her husband as subcontractors of a company that exported snails to France. Another female interviewee from the Wijewo municipality, also in Wielkopolska, opened a second-hand clothes shop called “The Old Wardrobe” in her village. However, her initiative was not met with a friendly reaction: “Generally, people from my village did not visit my shop. I later found out from one lady who is friends with my mum, and me too, to some extent, that she talked to people from the village and they said they were not going to visit my shop because why should they give me an opportunity to make some money, right?” [8.Wijewo\_Zaborówiec\_K.25]

Innovativeness in interviewees’ ideas for their own businesses is therefore about providing rural dwellers with services widely available in cities but often unavailable in their vicinity. Generally, most interviewees were not considering starting their own business due to bureaucracy associated with it, risk-related concerns or conviction that no service point had a chance for success in their localities.

### **Innovative social activities of rural inhabitants**

19 men and 29 women indicated that they became involved in some activity benefitting their villages, usually incidentally, either by helping organise a harvest festival or some other local events, or by participating in sports competitions or campaigns aimed at improving local infrastructure, (e.g. campaigns of a group of inhabitants to renovate roads, equip the local playground, improve street lighting). 20 interviewees, including 13 women and seven men, declared that they themselves were the initiators of some actions in their local community. Some of those becoming involved in social activity (eight women and 11 men) were members of local organisations: Volunteer Fire Brigades (*Ochotnicza Straż Pożarna*) (men and women), sport clubs and hobby groups (men) and women’s organisations (women). Only a handful of the young adults researched fulfilled some function in the local authority: village representative (*sołtys*) (one woman), member of a village council (*członek/członkini rady sołeckiej*) (one woman and one man), municipal councillors (*radny/radna gminy*) (one man and two women), and district councillor (*radny/radna powiatu*) (one man). A few other people were considering running for village representative or a local election or had already attempted to do so without success.

The activity of 20 people (13 women and seven men) seems to contain innovative elements. This included initiatives introducing new cultural patterns into rural communities, such as those connected with entertainment and recreation or activities aimed at young people. In some cases, it was the interviewees themselves who described their activities as innovative. Other cases concerned involvement in informal common interest groups: winter swimming, runners, and cyclists (men). One female interviewee from the Walim municipality in the Lower Silesia province was involved in the organisation of amateur car races as part of “Racing Walim” group. A few other female interviewees talked about initiating free dance, Zumba or aerobics classes for local inhabitants. Another female interviewee from the Walim municipality, an employee of the municipal office, spontaneously organised a charity event to collect money for a boy with leukaemia: “I organised a kind of marathon with my friend who is a Zumba instructor, a charity marathon. (...) I knew that the money was needed urgently... In three days we organised a collection, at first my friend and I went door to door collecting PLN10, we printed out some donation certificates. And then, on the last day, there was this charity marathon here in the sports hall, a lot of people came and... Well, we managed to collect PLN5,000 in three days.” [10.Walim\_Walim\_K.31].

Some other interesting examples include organising a sports fan zone for the inhabitants during some major football competitions – in the local “Orlik” sports centre or the community building (male interviewee from the Moszczenica municipality in Małopolska); setting up a local association aimed at organising summer activities for children and intergenerational projects (a female interviewee from Moszczenica); organising a Polish-Ukrainian youth exchange that involved more than just school activities and engaged the whole of the local community (a female teacher from the Gródek nad Dunajcem municipality in Małopolska), and organising a console games competition with prizes (a male interviewee from the Wijewo municipality in Wielkopolska).

An interesting although perhaps not completely innovative phenomenon is the “takeovers” of traditional organisations and models of social engagement characteristic of rural communities by young educated inhabitants. In one of Krzymów municipality villages in the Wielkopolskie province, young people took the reins at the Volunteer Fire Brigade which had been managed by the same older men for years. Under the new board,

the unit's equipment expanded, a Youth Fire Brigade Team was created and firefighting as well as sports competitions were once again organised. Another planned project is to create an outdoor gym with the aid of the village fund.<sup>4</sup> In the municipality of Pečław in Lower Silesia, a group of young women belong to a "Housewives" organisation based on the previous Rural Women's Organization (*Koło Gospodyń Wiejskich*). Their activities are typical of such an organisation. They include preparing a harvest wreath, organising events and trips for the rural inhabitants, participating in exhibitions of folk art and cooking competitions. In Wielkopolska's municipality of Walim, a group of young inhabitants organised a beach volleyball court as part of community action work using their own resources. In a small village in the Wijewo municipality in Wielkopolska, young rural dwellers feel responsible for organising the harvest festival. Opinions of the interviewees from that village were proof of their authentic sense of responsibility for taking over from the older generation.

However, it needs to be pointed out that about half the interviewees do not become involved in any local community initiatives. Among the reasons for lack of engagement mentioned by interviewees were lack of time (e.g. when having small children), lack of ideas for activities, and unwillingness to put up with unreasonable claims of some inhabitants.

### **Factors conducive to innovative initiatives**

Those carrying out innovative economic initiatives, or were preparing to carry them out in the future, constituted a minority among the interviewees. As far as this group is concerned, higher education is not strongly correlated with innovativeness. Therefore, it is worth identifying other factors that characterise this minority.

The interviewees who talked about innovative economic initiatives tended to originate from the village in which they currently live, have experience of living in a city during studies and "family social capital" [15]. They usually indicated some family members who fulfilled public functions or were actively engaged in the life of the local community (father or mother, siblings, mother or father-in-law, aunts and uncles). Most of them are over 30 or approaching 30 and tend to hold a master degree. The interviewees who discussed innovative economic initiatives also have similar motivations for living in the countryside. Most of them feel closely connected with their home villages and cannot imagine living in a city. Women originating from villages other than those where they currently lived emphasised their husbands' devotion to their home villages. The motivation of these people to live in the countryside also included the wish to live "among their own folks" – surrounded by family, friends and neighbours whom they have known since childhood. Some interviewees said they felt obliged to look after their parents as they got older and continue their life achievements. Interestingly, most interviewees who mentioned innovative economic initiatives were also involved in local organisations and social activity benefitting their villages.

The interviewees whose social engagement bore innovative elements had similar characteristics. They also often lived in their village of origin, had family social capital, had experience living in a city during their studies, and were of similar age. In six cases, they were the same people as those indicating innovative economic initiatives. Motivation to live in the countryside was also similar, including connection with the home village and willingness to work for its benefit and an aversion to an urban environment. However, some of the interviewees tended to emphasise pragmatic motivations, such as better housing conditions and lower costs of living, finding employment in the vicinity, or losing a job in a city. Also, this group included more childless people and people without partners (although less frequently), while the interviewees indicating innovative economic initiatives tended to have their own families.

The significance of the local context requires a separate analysis. Most innovative economic and social initiatives were indicated by the interviewees from the municipalities in Wielkopolska, Małopolska and Lower Silesia. In both municipalities in Mazowsze there were only a few isolated cases. Specific features of villages may also be of importance, including historical traditions of economic and social activity of inhabitants, the

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<sup>4</sup> Since 2009, municipal councils in Poland have had the ability to create a village fund (*fundusz sołeczki*), used to provide financial support for their sub-municipal auxiliary units in rural areas located within their territory.

contemporary context of institutions and organisations operating in a village, and the availability of various services.

### Conclusion

In the light of the analysis of professional activity and social engagement of young people with higher education living in the countryside, no more than one quarter of them carry out or would like to carry out in the future some innovative economic initiatives or social activities for the benefit of their own villages. Young educated rural inhabitants rarely become “innovators” introducing new models of entrepreneurship and management, novel ideas or cultural patterns in the rural environment. Those who have such potential tend to have family connections with a given village, family social capital (models for social activity and engagement in the local public sphere), and experience of living in the city during their studies. They made a conscious choice to live in the countryside because of a strong bond (or partner’s bond) with the village or with family and neighbours, and they have a wish to act for the benefit of the local community. Other interviewees who also originate from the village in which they currently live but lacked family social capital tend to live in the countryside due to more pragmatic reasons. They are usually focused on their professional or family lives and often do not express the wish to become involved in other activities. A question remains whether the previously mentioned minority – young people who already fulfil or will fulfil the role of local “innovators” – will constitute a sufficient basis for creating a new rural elite capable of taking responsibility for the future development of their communities.

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**ELDERLY PEOPLE AS KEY ACTORS BEHIND SOCIAL INNOVATIONS IN RURAL AREAS:  
EXAMPLES OF CARE COOPERATIVES IN THE NETHERLANDS**

**Abstract**

The article explores the potential of elderly people living in rural areas in terms of implementing social innovations related to care provision. It is argued that seniors should receive greater recognition as important actors organizing care at the local level. Two examples of care cooperatives recently established in Dutch rural communities are used to illustrate the argument. The article is based on a literature review and in-depth interviews conducted in the Netherlands in February 2017. The challenges involved in transferring this model to Poland are also discussed.

**Key words**

elderly people, social innovations, care cooperatives

**Introduction**

This article discusses the potential for elderly people to implement social innovations in rural areas by examining two care cooperatives recently established in the Netherlands. The goal of such cooperatives is to provide better, more personal and flexible care, and to increase awareness of this approach in comparison with traditional care providers, such as day care centres and nursing homes. Care cooperatives offer a network of support under conditions of weakening family and neighbourhood ties. The support is often provided by elderly people themselves, such as when younger and healthier residents help older neighbours in need. Care cooperatives are community-based social innovations that emerged in the Netherlands under conditions of economic austerity and a shrinking welfare state [1]. Under these conditions, it is not surprising that citizens implement solutions to problems in care without waiting for state initiatives. Both care cooperatives were founded by retirees living in rural localities, and most members and volunteers are elderly rural residents. It is argued that older people should be recognized as significant contributors in transforming the existing inefficient system of healthcare provision [2]. They are not just passive care receivers, but often undertake the role of carers and even social innovators introducing novel care solutions.

The article contributes to on-going discussions of the consequences of population ageing and decline observed in many rural areas of Western and Eastern Europe [3, 4]. The demand for care services is rapidly growing, especially in rural areas where the cost of delivering services is usually higher due to greater spatial distances and lower population densities. The recent economic crisis sped up the progressive reduction of state service provision. At the same time, social ties in rural communities are loosening due to the out-migration of younger generations, in-migration of newcomers from cities and socio-cultural changes triggered by globalization and individualization characterizing modern societies. Diversity of rural areas in European countries, as well as that in rural populations, makes the issue even more complex. Therefore, there is a need for innovative and flexible small-scale solutions. The article contributes also to the highly insufficient literature on rural ageing and of the elderly in community engagement and mutual support, especially in terms of care. [2, 5].

Firstly, there is a brief review of the literature on current tendencies in dealing with ageing and community engagement of the elderly in rural areas, followed by an overview of the Dutch context. Two conceptually innovative care cooperatives established in the rural Netherlands will be examined in detail. Finally, concluding remarks will be provided. Also, possibilities and challenges in transferring this innovation to rural Poland will be discussed. The Netherlands and Poland are obviously very different in terms of scale in rural populations, agricultural production, farm size and welfare systems. Nevertheless, innovative solutions tested in the West could be inspiring for Eastern European countries.

The article is based on a review of literature and in-depth interviews with the founders of selected cooperatives ([I.1] and [I.2]) and academic experts on the subject [I.3].<sup>1</sup> The empirical material was collected in February 2017 during my research stay at the University of Wageningen. While the examples of care cooperatives studied cannot be seen as representative for such initiatives in the Netherlands, the analysis presented is a starting point for further, more in depth investigation.

### **Elderly rural residents as support providers – a literature review**

As O'Shea states [6: 279], the literature depicts elderly rural residents as passive recipients of support rather than contributors to the local cohesion: *"There is sometimes a stigmatizing view that older people are dependent and therefore unwilling and/or unable to contribute to local communities. Indeed it is easier to find evidence of what older people living in rural communities lack or need rather than what they contribute to the society."* However, many older people remain active and are willing to work and engage locally. They often recognize local needs and problems much better than younger people or professionals from outside. They may be able to address problems more effectively as they often have better insight into the community. According to the author cited, such potential of elderly rural residents tends to be overlooked [6: 279].

Indeed, existing research focused on the active involvement of elderly rural residents in the community is quite limited. However, data collected from various projects in a few western countries (Australia, Canada, the Netherlands, Ireland and Northern Ireland) support the thesis that the rural elderly are important actors in the social and political life at the local level. The rates of their participation in social activities, civic organizations and volunteering are higher in comparison with their counterparts living in cities [2, 5, 7, 8, 9]. In Poland, there is some evidence that elderly rural residents often engage in local government, especially by attaining the position of village representative (*sołtys*), as well as various types of local organizations and informal groups [10]. In the USA, existing research on retirees migrating to rural areas describes them as "grey gold" [11]. They stimulate the demand for housing, commercial goods and services. Elder in-migrants tend to boost the development of social capital at the local level due to their willingness to volunteer and lead civic activities in the community. They contribute to local government and other public structures by providing professional and technical assistance free of charge [11].

The existing research on the involvement of elderly rural residents in providing care within the community is even more limited. What was found is that older people's activities are often based on reciprocity – helping others and receiving support from them, such as assisting with domestic duties, shopping or simply visiting [5, 9]. Type and level of their engagement varies according to their origin and length of residence, gender, age and level of education [5, 9, 10]. It is important to note that, according to Dutch research, rural women more often than men help others with personal care, housekeeping, childcare and by visiting older and disabled people. They are also more active than men in community centres, women's and elderly organizations and do more voluntary work in hospitals and nursing homes [8: 386-387].

The recognition and analysis of the potential of elderly rural residents in terms of providing care is crucial in today's ageing societies, especially in rural areas. The main responsibility for providing services is being transferred from the national level to the local one. Moreover, the available public support is shrinking due to growing economic austerity. As a result, the concept of "community care" is gaining popularity. It encompasses a mixture of formal and informal health and social care services and support provided by institutions, professionals, non-profit organizations (NPOs), volunteers, as well as family members, friends and neighbours [12]. Often, it seems to be taken as guaranteed that rural communities are "well equipped" to fit in this model. Indeed, regarding care provision, rural communities are often described as deprived in terms of accessibility to institutional services but rich in informal networks encompassing family members, neighbours and friends [13].

However, such a view on rural communities is highly oversimplified. Walsh et al. [9] point out that the demographic structure of rural communities is undergoing dynamic change. On the one hand, out-migration of the younger generation leads to reduced services provided locally and fewer support networks for older

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<sup>1</sup> The Short Term Scientific Mission was carried out in the frame of the COST Action IS1409 "Gender and health impact of policies extending working life in western countries" between 25<sup>th</sup> of January and 22<sup>nd</sup> of February 2017 in Rural Sociology Group (RSO) at the University of Wageningen.

people. Interpersonal relationships in rural communities are changing in that people are not used to calling at each other's homes anymore, and casual visits among neighbours are much less frequent. On the other hand, the processes of counter-urbanization, retirement and foreign migration are contributing to greater diversity in rural communities. These changes shape the contexts of ageing in rural areas and lead to increasing demand for flexible solutions addressing different needs in different local contexts.

### **Context of dealing with ageing in rural areas in the Netherlands**

The Netherlands is highly urbanized and densely populated. There are no predominantly rural regions in the country when the OECD definition is applied at the NUTS-3 level. Still, some areas, like the northern part of the country, are socially perceived as rural. According to the definition of a rural area based on address density (fewer than 500 addresses/km<sup>2</sup>), the three northern provinces of Friesland, Drenthe and Groningen are the most rural, together with Zeeland, which goes in line with the social perception [14: 25-26].

It is expected that the Dutch population will start to decline from 2040. However, this can already be observed in some rural and peripheral regions such the northeast of Groningen, Zeeuwsch-Vlaanderen and de Achterhoek [15]. This process is caused by population ageing and out-migration of young people to the cities. In general, in regions where the population is already declining, it is expected that by 2030-2040 more than 1/3 of the population will be over the age of 65. Also, the share of people over 80 will grow significantly [16].

The tendency to concentrate and reduce healthcare institutions and other public services in rural areas, especially those affected by population decline, is also observed in the Netherlands. This concentration means large-scale, less personal services, often deteriorated in quality. The state is also seen to be withdrawing from direct healthcare services preferring to support citizen-led initiatives and decentralized distribution of public funds for healthcare and other services. In 2007, the Social Support Act was introduced in the Netherlands, which stresses the importance of active citizenship and volunteering. As Verhoeven and Tonkens state [17: 1], "Active citizens are expected to take personal responsibility for their employability, health and finances as well as for the social cohesion, safety and 'liveability' of their communities. Through volunteering, citizens are expected to shoulder tasks formerly performed by the state, such as providing care and support to disadvantaged and vulnerable groups." In these circumstances, the focus is on solutions that are smaller scale but also personal, of good quality and cheaper.

### **Care cooperatives as social innovations in rural areas in the Netherlands**

Social innovations can be defined as new ideas (products, services and models) that simultaneously meet social needs (more effectively than alternatives) and create new social relationships or collaborations [18]. Bock points out novel elements of rural initiatives for social innovation [1: 566]: context of welfare state reform/austerity, new importance of self-reliance and self-organization, less trust in state support, collaboration with large and distant partners, use of ICT for self-organization, and developing alternatives with relevance beyond the local, positive re-labelling of "the rural". Care cooperatives recently established in rural areas in the Netherlands meet all these requirements [1: 566].

The first one was established in Hogeloon in 2005 as part of a movement in rural areas aiming to maintain local care facilities enabling elderly and disabled residents to stay in their villages. It is run by 25 professionals and 50 volunteers and offers care to 230 elderly people – members may live at their own homes or in one of the care villas located in the village. Care cooperatives are highly promoted by Dutch policymakers as good examples of active citizenship. Currently, there are about 50 such initiatives in the Netherlands [1: 561]. Care cooperatives are based on a mixture of professional and voluntary care, rooted in the concept of mutual help and solidarity: "You may also be not only a patient, but also offering some help, so that you exchange – you help somebody with something and the other person help you to do shopping. This is the important point of the discussion how elderly people could help each other." [1.3]

### **Care cooperative A: providing healthcare services at home**

Care cooperative A was established in 2005 in the Province of North Brabant. It covers the municipality of L. which consists of four villages with a total population of 22,000 people. The cooperative is focused on delivering care at home, as the enlargement and concentration of healthcare institutions means that services



are more distant and care givers from institutions change constantly. The services include medical care provided by nurses, including palliative care, and assistance with one's daily tasks at home, like help in moving around your apartment or house, daily hygiene, and cooking. [I.1] The cooperative is managed by a board consisting of volunteers.

There are currently about 300 members in the cooperative. Single members pay only 16 euros per year, couples 22, as such affordability ensures access for everyone. Most members are already retired but not all join to receive services, some sign to show solidarity and some are anticipating future needs.

At the beginning, the initiative received financial support from local government, and local cooperative banking associations. Currently, cooperative care services are financed from different sources, including private money from care recipients or their families, municipal funds and public funds for re-integration on the labour market for healthcare workers who lost their jobs due to economic reforms and cutbacks.

### **Care cooperative B: connecting care seekers with care providers**

Care cooperative B was established in 2015 and covers rural areas in three municipalities of Achterhoek, which is highly affected by population decline. The aim is to connect care seekers with care providers via an on-line platform: "The care seekers can find a care provider by themselves. (...) According to the profile, the care seeker can make his/her choice, look for the best price." [I.2] Available services include domestic help and companionship (doing shopping, taking care of pets, cooking, playing games, help with transportation, walking or doing sports together), taking care of the garden (cutting grass, watering plants), help with managing finances (e.g. paying the bills, taking care of the invoices), carpentry, painting and many others. The care cooperative is managed by a board of five volunteers who facilitate collaboration between care seekers and care providers.

Currently, there are almost 150 members (care seekers and care providers) in the cooperative. Most (about 70-75%) are elderly middle class people, independent and with a proper source of income. They perceive the cooperative as a good opportunity of getting support at home. The interviewee calculated that about 20-25% of the members are younger. The cooperative is also a good solution for people busy with professional commitments who don't have time for domestic duties [I.2].

At the beginning, the cooperative received start up financial support from the municipality. The cooperative's maintenance costs are not very high (renting rooms for meetings, maintenance of the on-line platform, publicity), but they still depend on subsidies from public institutions and private sponsors. The goal is to have enough care seekers and providers registered to be break even.

### **Establishing care cooperatives: older people as social innovators**

Both examined care cooperatives were initiated by local retirees. In the case of cooperative A, one of its founders was a former director of the large local healthcare institution: "I retired when I was 65 and it was a pity to overthrow all the knowledge and expertise that we accumulated. That is what you often see in projects: no one continues with it when they are completed, so all gained and acquainted knowledge is lost." [I.1] Apart from that, his wife suffered from dementia, so he also had extensive personal experience as a family caregiver. The direct sources of inspiration were care cooperatives observed in rural areas in Sweden during a study visit organized for representatives of local government and public institutions. The 'care cooperative' model fit very well into local traditions of the cooperative movement in the region. Eventually, he managed to mobilize a group of local leaders concerned with the issues of healthcare and ageing.

Care cooperative B was established by an anthropologist who used to work for international TSOs (third sector organizations) such as Doctors without Borders and International Red Cross. He was inspired by the idea of two Dutch social entrepreneurs who developed such an on-line platform in 2013 in Zoetermeer, a city located close to The Hague. He heard their story on the radio and thought about the difficult situation of his own grandparents and parents when they had become older and decided to establish a similar platform in his region.

**Elderly rural residents as active actors of service provision**

Both care cooperatives examined engage elderly people not only as recipients of services but also as care providers. In care cooperative B, the share of retirees among registered care providers is substantial. According to the interviewee, many of them are retired employees of healthcare institutions who still want to use their professional experience and, at the same time, gain some money for doing that. Self-employed professional care providers are the minority [1.2] It is also worth mentioning that, in general, most care providers are women. However, it depends on services offered. For example, male care providers offer help with the garden, carpentry and electrical installations. Help with managing finances is also usually offered by men, whereas domestic help is provided by women.

In care cooperative A, some services and labour for the cooperative are provided by local volunteers, many of whom are already retired. Currently, there are 15 volunteers in the cooperative, but they can also count on the volunteers who are members of 360 associations and civic initiatives in different villages in the municipality. They include mainly senior people with a diverse set of skills, willing to share their knowledge and expertise by getting involved in local initiatives. The cooperative is supported by groups of women providing meals, but also specialists (women and men) who used to work at Phillips or made their careers in the ICT sector [1.1]

Apart from that, the care cooperatives empower care seekers by letting them co-organize the care provided. The cooperative formula guarantees the members a voice and voting rights on assemblies. In cooperative B, care seekers can freely choose care providers: “It’s so important to create a kind of self-management by the care seeker, so that the care seeker is able to find his/her own care provider for a certain amount of money and a certain time of the week. It is a care seeker who is able to organize his own care. It’s an empowerment of the care seeker.” [1.2]

Also, both cooperatives encourage diversification in Dutch healthcare by networking with other citizen-led initiatives in the field. Structures created by these initiatives negotiate with public institutions to make their perspective more visible and recognized. Both care cooperatives also take part in organizing on-line platforms connecting similar initiatives operating in different regions of the country. Apart from that, care cooperative A, together with a few other care cooperatives and local associations from Northern Brabant and Limburg, established a supra-local entity, which is a kind of an umbrella structure. Through this entity, they try to sensitize the representatives of the Ministry of Health, Welfare and Sport to differences between small-scale care providers and large healthcare institutions. They were asked by the Ministry to present some recommendations in terms of addressing difficulties care cooperatives face and to participate in a round table discussion.

**Care cooperatives as flexible solutions creating social capital**

Care cooperatives address needs related to the dissatisfaction with the quality of care services provided by large-scale healthcare institutions. They provide more flexible services tailored to individual situations based on a personal relationship between care seeker and care provider. First, care seekers are usually attended by one care provider who provides various services according to personal needs. For example, the same person can clean your house, do the shopping, walk your dog and cook your meal in the afternoon. When medical assistance is needed, you are visited by the same nurse every day. It would not be possible within the professional healthcare system, where care provision is organized into tasks coded as separate and provided by different people. Secondly, care providers in care cooperatives are often people from the same community as care seekers or live relatively nearby. Therefore, care providers are rarely alien and anonymous for care seekers [1.2].

By creating personal relationships between care seekers and care providers who usually live in the same area, care cooperatives address changing social ties observed in rural communities. They cover the vacuum left by family care providers who don’t live in the village anymore or don’t have time to take care of elderly relatives. Apart from that, relationships between neighbours are not as intense as they used to be. On the one hand, people feel less obliged to help. On the other, elderly people don’t like to feel dependent on the good will of others. Care cooperatives then fill the gaps left by shrinking resources for bonding social capital based on close family, kinship and neighbourhood ties. Referring to the types of social capital distinguished by Putnam [19], care cooperatives create, on the one hand, other resources of bonding social capital in the neighbourhood by connecting people of similar age and backgrounds who don’t know each other so well. On the other, care

cooperatives produce bridging social capital as similar age and professional experiences of care providers and care seekers, as well as their common area of residency are not always the case. It is important to emphasize that the care cooperatives established mechanisms to reduce risks in collaboration between people. For example, in care cooperative B, people who want to register as care seekers or care providers are visited and carefully checked by the board members.

### **Concluding remarks**

The care cooperatives examined are interesting examples of social innovations initiated and implemented in rural areas by elderly residents. They address mainly the needs of older people related to healthcare services and assistance with various household duties as well as companionship. Such cooperatives clearly enable rural residents to “age in place”, i.e. continue living in their own houses while becoming less physically fit [20]. The initiatives studied show the importance of the engagement of elderly people themselves in organizing care in rural communities. These initiatives should receive greater recognition and support from local authorities and policymakers [5, 9].

However, the shortcomings of care cooperatives also need to be raised. According to Bock [1], their dependency on voluntary work makes them vulnerable and puts their sustainability under serious risk. Also, as my expert interviewee emphasized, the situation of non-members remains unclear: “(...) there is a problem of exclusion. Because you privatize the right to care. Because there are always outsiders in villages. And what about them?” [1.3] Therefore, there is a need for more elaborate research, including other care cooperatives and the opinions of their members and local non-members.

### **Discussion: lessons for Poland**

According to projections, the Polish population will become one of the oldest in Europe in the next fifty years [21]. Unlike most Western and Eastern European countries, the most dynamic processes of population ageing are characterized in urban areas, but this trend is highly visible in rural areas as well [22]. It is worth pointing out that older people living in Polish rural areas are getting more diverse as a social category. First, existing studies of recent migration from urban to rural areas show that most newcomers are young adults and families with children, but a part of this influx, though smaller, consists of retirees. Secondly, due to the advancing disagrarization of employment, the category of retired farmers is shrinking, whereas the share of various professional experiences gained outside agriculture is increasing among the rural elderly [22]. All these processes create new challenges regarding rural ageing in Poland. A longer life expectancy means an increasing exposure of elderly people to chronic diseases, which may often remain unattended due to looser family ties and declining social relations in rural communities. Apart from that, older people living in rural areas will become more diversified in terms of their needs and expectations concerning types of support. The Polish welfare system, like those in other European countries, is experiencing great political, economic and social pressures [4].

The model of care cooperatives could be attractive as there are quite strong traditions of the cooperative movement in Poland, also in rural areas, as well as recent experiences with establishing so-called social cooperatives supported by EU policy [23]. However, there are serious doubts about care cooperatives' funding of care services. Would people be interested in spending their own money in such an experiment, especially retirees whose pensions are often rather low? In cases applying for EU funds, how would the sustainability of initiatives be ensured when the funding is over? Apart from that, there are important cultural differences between Poland and the Netherlands. First, due to the complicated history and the experiences with the communist regime, Poles rarely trust institutions and people they don't know. Apart from that, people in Poland, especially those in rural areas, are more willing to organize themselves in an ad hoc manner to solve a problem than engage in formal associations or volunteer on a regular basis [10]. Last, there is a problem of digital exclusion of elderly people in Poland. In 2016, only 26% of people aged 65 or over used the Internet at least once a week. The share of Internet users among people aged 55-64 was 43% [24]. Also, despite the lack of specific data, it can be assumed internet access is more restricted for the rural elderly than the urban.

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## MIGRANTS FROM CITIES AS CULTURAL INNOVATORS IN THE RURAL COMMUNITIES OF THE ŚWIĘTOKRZYSKIE PROVINCE

### Abstract

The rapid cultural transformation of the countryside in Poland weakened the previous rural culture, but the inhabitants of peasant origin have preserved to some extent the core values constituting the former cultural identity. New ideas and behaviours become innovations when they are in line with the core values of the given culture. The influx of urban to rural migrants can carry innovation, but only under certain conditions, and its extent is usually limited.

### Key words

cultural innovation, cultural identity, rural culture, urban to rural migrants, agro tourism

### Introduction

Transformations or changes have long been one of the main themes in rural studies [1]. They are often interpreted in terms of the disappearing of rurality or (constitutive for it) the category of peasants, or – finally – folk culture [2] [3] [4] [5]. On the other hand, rurality and peasantry continue to be the object of interest for successive generations of researchers and have not disappeared from the social imaginary of the Poles for two reasons. The first reason concerns the nature of change that transforms modern globalized culture. This culture *thrives on 'difference'* [6] and peasants became figures of cultural difference, while the adjective *peasant* moves from the sphere of ideology and culture to the sphere of consumption [8]. Peasant origin becomes another trademark that drives the sale of organic food, tourist and property services, but it is accompanied by death and/or musealisation of the existing forms of folk culture, such as the peasant movement in literature. The *ethic of cultural difference* [8] is also expressed in the search for *self-identification and cultural identity by reference to the 'other' culture* [8]. On the other hand, anthropologists researching rural culture in Poland [9] [10] [11] indicate that it transforms with various social and cultural speeds [12]. Particular groups of villagers in different regions are more or less susceptible to change. First and foremost, what changes quickly is a sort of cultural sheath [13], such as casual consumer choices, fashionable whims and market offerings. On the other hand, the *core values* [14] change very slowly. They are the basis of cultural identities [12] [15] and are reflected in habituses [16], and these can survive the transformations of social reality. Although practices are prone to structural change, the ways of conceptualisation are rooted in known and available meanings [16]. This vitality of long-lasting cognitive structures [15] among the various groups of the descendants of peasants determines the continuation of folk culture, despite the changes in living conditions in the countryside.

### Innovation within cultural identity

How should one understand cultural innovation in this context? Many definitions of cultural innovation treat it as a synonym of change in culture. For example, *the processes by which a novel cultural trait emerges and spreads within a society* [17]. There is a body of literature, especially written from the evolutionary point of view [18] [19] [20], describing the mechanisms and rules of cultural transmission, namely – *who copies what from whom, and how* [17]. However, the mere popularity of the term 'innovation' proves that it signifies something else, not only modes of cultural transmission. The convenient departure to the more precise description of the cultural innovation seems to be from the theory of cultural identities.

Stuart Hall distinguished two understandings of cultural identities. *The first position defines 'cultural identity' in terms of one, shared culture, a sort of collective 'one true self', hiding inside the many other, more superficial and artificially imposed 'selves', which people with a shared history and ancestry hold in common* [21]. According to the second understanding cultural identities are (...) *the unstable points of identification (...) which*

are made, within the discourses of history and culture. Not an essence, but a positioning [21], so they incorporate not only what a category of people has in common, but also differences within it. In both perspectives, cultural identities can be recognised mostly *in retrospect* [21] and in reference to *the "other"* [21]. However, the recent works of the Polish anthropologists [12] [15] seem to merge these two approaches, simultaneously making the concept of cultural identities less past-oriented. As argued by Anna Engelking, "*The answer to the question 'who are we as a community?' always crystallizes around the specific question 'what is most important to us?'"* [15]. Hence, the cultural identity embodies the core ideas and values of the social category [12], shared throughout the long periods of time, usually generations, but allowing for some intra-group differences in the less important issues. The analysis of the literature of the contemporary Polish rural culture suggest that it is still the *active culture* [22] and that it is capable of absorbing and integrating foreign elements, as far as they conform to the stable cultural identity. Although it is increasingly encountered and penetrated in rural communities by the mass culture and other cultural forms, some of which are brought by new non-agricultural categories of rural residents, including different groups of urban to rural migrants, its enclaves and elements persist, also due to innovations.

Therefore, as "change" is the result of differences in the lasting identity [1], an "innovation" is a change that improves the functioning of the system, or allows it to adapt to new conditions. It cannot lead to its *death*, and in the case of culture, to its transformation into another culture. It cannot, therefore, violate the core values expressed in the cultural identity, but should lead to their more thorough fulfilment, or at least to their survival in unfavourable circumstances.

### Research questions and fieldwork

Thinking on the role of urban to rural migrants in the cultural innovation process, it is necessary to describe the core values of the Polish rural culture, discuss the attitudes towards these values among the heterogeneous category of urban migrants, and then to examine – on the basis of the fieldwork research – which innovations in rural culture were adapted due to the influence of migrants, what are conditions for appearing and spreading these innovations, and what distinguishes the groups which are the most influential in this process. The focus will be made on the issues connected to family farming, as this seems to represent one of the most important values of the rural culture, and is also one that is particularly challenged by current economic changes.

The research<sup>1</sup> was carried out in the Świętokrzyskie Province (Kielce County), in three villages which will be designated as Podlesie, Ustronie and Moczydło for the purposes of this article. Economic and cultural modernization processes occur relatively slowly in this area [23], so it preserves many archaic elements of the landscape, centuries-old settlement structure and elements of the magical and religious way of thinking [24]. It is thus the area of relatively firmly rooted traditional values and strong social control, as evidenced by low rates of crime, divorce, and extramarital births (data from LDB CSO<sup>2</sup>). The choice of the villages provided insight into the various directions of rural development [25] and the presence of different types of urban to rural migrants. All villages have a tradition of semi-subsistence, non-specialized farming that is typical for central and eastern Poland. Currently, Podlesie – the smallest (about 300 inhabitants) and the most peripherally located – is the closest to the type of agricultural village. Moczydło, the largest of the studied villages, with more than 900 inhabitants, has evolved into a suburban village, and agriculture is in decline there. The village has a relatively young population and is growing rapidly. However, the most new households are constructed by children and grandchildren of the previous residents. Ustronie (less than 600 inhabitants) is close to the category of

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<sup>1</sup> Fieldwork was conducted in August 2013, in August 2014 and in March and April 2016. 44 in-depth interviews (individual and affinity group) with migrants and native inhabitants were conducted. Cultural activists – members of associations, bands, municipal councilors – are strongly represented among the interviewees. The category of people aged 40 and more dominates, but there are also representatives of the younger generation. Participatory observation of cultural events taking place in these locations was also carried out, as well as a review of the websites of the associations operating in the studied villages, their accounts on Facebook and YouTube, as well as articles in the regional press on cultural initiatives that took place in the current decade.

<sup>2</sup> <https://bdl.stat.gov.pl/BDL/start>

multifunctional village. The main source of income is employment outside the village, mainly in Kielce, with which the village has a convenient road connection, but agriculture is commonly practiced by native residents. Urban migration to all the villages is individual – there are no developer housing estates. The migrants are of various family situations, but most are elderly marriages. The biggest number of migrants are in Ustronie – nearly 10 households (including a couple of men – immigrants from the Netherlands). In Podlesie there are only two families, but they are socially active. In Moczydło this category is blurring because there are migrants without family connections with the village, people returning after years of living in the city, and the owners of summer cottages.

### Cultural identity of the Polish village

The analysis of the Polish ethnological and anthropological research on the Polish rural culture [8] [10] [14] [16] leads to the conclusion that its core values can be traced back to the late 19<sup>th</sup> century peasants. Through the consecutive periods the rural populations have been undergoing dramatic changes. However, it can be claimed that the foundations of the Polish rural culture – the long-lasting cognitive structures, as cultural identities [15] and habituses [16] – could still be observed at the turn of the 21<sup>st</sup> century. Due to that fact, the designation ‘Polish rural culture’ could be used to the at the turn of the 21<sup>st</sup> century and a hundred years later<sup>3</sup>. It should be emphasized, however, that ‘rural culture’ is primarily a scholarly or intellectual construct, a mean of structuring the fieldwork insights, so it should not be understood essentially, and one could combine it – especially contemporary – with other available cultural values and forms, like mass culture and popular culture.

The core values of the Polish rural culture can be summarized as God, community (centred around the family bonds) and work in agriculture. The peasants’ life was immersed in the Christian sacrum, which defined their place in the world. Identification with Christ, especially suffering and crucifixion, allowed them to humbly accept a difficult peasant's fate (*dola*) [15]. Passion and faith in justice whose rulings will be finally fulfilled created a peasant's pattern of being in the world and was a co-component of the peasant ethos [26]. The extended family permeated with the neighbourhood ties, constituting the rural community [12]. The family was the primary, multifunctional and culture-making unit of social life [1] [12].

However, the most distinctive feature that shaped the rural identity was the high valorisation of hard work, especially on the family farm, even described by the Polish ethnographers [15] [27] as *agro-centrism*. Farming was perceived not only as a profession, but could be described as a lifestyle, the whole of *cultural being in the world*, [as – AW] *it contained undistinguishable spheres of practical action, communication and worldview* [11]. Farm life formed the principal stage for those performances of rurality, which Tim Edensor [28] found crucial for actualization and reproduction of rural habituses. Farming could thus be described as a *total reality* [20] and certainly determined the culture of Polish peasants. As long as it occupied such a position, peasants *were not able to self-destruct* [26] as a cultural category. The imperative of work permeated through the whole life and secured a job for all age groups – including children and the elderly – and did not include free time in the modern sense [15]. Even when worked was suspended for holidays, there were religious duties [29]. The farm work was also one of the primary means of socialisation, which enhanced its importance for the formation of the rural identities, habituses and similar forms of long-lasting cognitive structures. *These shared forms of practical enactments, everyday knowledge and embodied approaches to quotidian problems form mundane choreographies which are forged by doing things rather by thinking about them* [28]. For example, farming required a good knowledge of nature, but this knowledge was determined by the needs and ways of using by particular groups, which leads to connotation with *concrete knowledge*, as described by Claude Levi-Strauss [30]. As Edensor emphasizes, these cognitive structures, choreographies and *everyday knowing* can be crucial in forming the rural community, as they (...) *may be incomprehensible to outsiders who cannot immediately immerse themselves in an unfamiliar field* [28].

Hence, the value of an adult – his/her *honour, reputation and distinction* [16] – in the social system of the archetypical Polish village depended upon the ability to work hard, preferably on the family farm [15]. Earlier ethnographers described rural culture as the *culture of work* [27], as opposed to the culture of the *leisure class* [31], freed from work, at least in a physical sense. Land ownership is of great importance in the rural culture.

<sup>3</sup> Otherwise, we would be forced to write about a series of consecutive cultural phenomena, rather than about one, continuously developing Polish rural culture.



The possessed land constituted the social position of the peasant family and had not only economic, but also social value, as the main condition for the very existence of a group [32]. The cultivated land provided food and formed links with the heritage of ancestors. It was of an inalienable value and an object of longing when one had to leave it. Even today, attachment to it remains the characteristic element of the identity of the eldest generation of the Polish rural population [33].

### **The challenges of the rural culture**

The social and economic conditions framing the development of rural culture in Poland has undergone far-reaching changes, which have accelerated since Poland joined the European Union. The majority of the rural inhabitants have been freed from overwhelming work in agriculture, which leads to the loss of the essence of peasant culture [26]. *In big cities, free time is melting (...) And here – in the countryside – it only appears due to the change in employment patterns* [34]. The last wave of globalization coincided in Poland with the transition to a free market economy, which was a major challenge for rural people, both farmers, working class and intelligentsia [35]. The former were faced with decreasing and volatile prices and global competition. The working class groups with job insecurity, and often with the change from an abstract state employer to an entrepreneur, leading to the emergence of new employment relations. Due to marketing and mediatisation, rural population themselves start to look at the countryside as consumers, with their stereotypes and prejudices [8], and aspire to the urban lifestyle [36]. Rural areas are being restructured, and in some areas become mainly consumption spaces, developing functions related to leisure activities accompanied by the process of commercialization of rural resources [37]. The proportion of people working in agriculture – which is already a significant minority in rural population [38] – are decreasing. The proliferation of institutions, patterns of behaviour, attitudes and elements of material culture associated with the city, above all with the urban middle class (and earlier with the intelligentsia), create an impression that the rural areas undergo some form of urbanization<sup>4</sup>. In such circumstances, rural culture becomes increasingly intertwined with other types of culture, above all in mass culture and consumerism, and one is tempted to argue that it disappeared.

However, recent studies of the Polish rural communities [10] confirm that the individual and collective identity of their members is still based on the division between people in physical and intellectual jobs, or those *who work* and those *who don't have to work*. In addition, just wages are still conceptualised according to the long-lasting patterns. Interestingly, non-farming categories of the rural dwellers perceive the life of farmers through the toiled, never ending work. The identity of farmers is continuously based on the possession of the farm and the inherited ethos of work, despite the commodification of production and the dependence on market mechanisms. They do not want to accept the whimsical market as the measure of value of their work [35]. Valuable work is hard, physical, solidly performed on the land. In this context, it is not surprising that many authors [41] [42] [43] note the persistence of symbolic divisions between old (peasant origin) inhabitants and different types of migrants from cities, which increasingly flow into the villages, especially those located near cities or in attractive landscapes.

### **Urban to rural migrants and their cultural profile**

The positive valorisation of the countryside in modern western culture, especially as *a signifier of national identity* [28], has been extensively examined by rural studies [44] [45]. However, it seems that the positive value of life in rural areas appears in Poland in the scale unparalleled in other countries [46], which is reflected in settlement trends. Since 2000, urban to rural migration has been predominant in Poland. They strengthen the processes of retreat of the agricultural population and, as a rule, the newcomers represent values conflicting with the traditional rural cultural identity, especially in the field of professional activity<sup>5</sup>. Examples of agriculture are rare among urban to rural migrants, and those who move to the countryside to become a

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<sup>4</sup> There are plenty of concepts such as 'semi urbanization' [39], 'suburbanization', 'exurbanization' and 'peri-urbanization' [40], describing urban sprawl and the spread of urban patterns in (once) rural areas and communities.

<sup>5</sup> It should be emphasized that this category is extremely diverse, to the extent that they are rarely described in the Polish social sciences as one category, but rather within two more socially and culturally homogeneous types: suburbanites and New Settlers. These two categories are overlapping and do not cover all urban migrants, for example, those who have fled from cities due to the effects of economic transformation – unemployment and rising prices – counting on the reduction of the maintenance costs [11] in the inherited farms.

farmer are the least described group of migrants. In relation to the farmers, the newcomers are thus usually placed as crop buyers. For most (so-called) outsiders, rural life is the acquired concept of life, the consumer space [47].

However, the deterritorialisation of social reality has become more widespread. There is often even the necessity of remote work, so the household, as in agricultural culture, could again be considered a multifunctional centre of family life, if not the universal mediation of life. Some of the new inhabitants are engaged in agrotourism, in which the household becomes the source of income, making them more tolerant to the difficulties of rural life and open to relationships within the local community [41].

### **Migrants' innovations in the rural culture**

The changes in the cultural landscape occur throughout the rural areas regardless of the presence of absence of urban to rural migration. Most innovations diffuse into the countryside through media, school, market, and other institutions of modern society. However, the research conducted in the Świętokrzyskie Province confirms that migrants are often at the avant-garde of changes, and it is possible that their example inspires their neighbours who are deeper rooted in rural culture to learn more quickly. As for the work sphere, which is the main focus of this paper, the newcomers seem to be primarily the forerunners of the new approach to the rural cultural heritage and landscape. Some of them play an active role in the processes of reinterpretation of rurality as the asset on the market of *edutainment* [28], touristic, sports and leisure services. Although few urban migrants are involved in farming, this approach helps to preserve what determined the cultural role of traditional agriculture – the family's work in the inherited ancestral farm, and hence upholds the values of rural cultural identity.

Such attitudes are, however, distributed very unevenly throughout the three villages. In the most backward and otherwise traditionally agricultural Podlesie there are very few commercial activities connected with the newly interpreted agriculture and rural heritage. The two migrant families inhabiting the village were very active in organizing cultural events referring to folklore and cultural heritage of the region, but these activities were non-commercial. Moreover, one of the migrant families were treated with some distrust, due to the lack of permanent job, mental illness, parenting difficulties (children in foster care), New Age style spirituality and different cultural tastes. Although they were trying to conserve and revive the *archetype* of rural life, they were doing it according to a folkloristic and superficial understanding of rural culture, while at the same time violating many of its core values (hard work, care for the family and the farm, Catholic confession). Thus, their activities did not gain recognition in the community, their social status were rather low and after about 10 years of inhabiting the village, they were still labelled as strangers – *the artists*.

In turn, most of the migrants inhabiting Moczydło, the most suburbanized of the villages studied, retain very weak bonds with the native community. They usually commute to the nearby Kielce to work and study, and even retired newcomers have few interactions with the locals. None of them are involved in agriculture and have not contributed to the development of the numerous agrotourism farms located in Moczydło. The material and education status is usually high. Even wealthy native respondent labelled them as *the rich*. Except for having weak religiosity, they do not seem to break from the social norms of the rural community. However, they are isolated from most forms of communal life in the village, and their immediate influence on the native community seems to be weak and rather counter the values of the rural culture. The exception is one family that has its roots in the village.

The only village where the influence of urban migrants on the diffusion of innovations in rural culture seems to be significant is Ustronie. As for the agricultural sphere, their impact can be found primarily in agrotourism, which has evolved in the Polish countryside in response to the crisis of traditional family farming. There are many institutions supporting and promoting agrotourism run by the state, municipalities and non-governmental organizations. The culture of promoting innovation and looking for a local brand in rural traditions, such as by finding and inventing [48] regional and local products, reaches the countryside by different routes. However, out of ten agrotourism farms located in the village, four are run by urban to rural migrants, and one by a couple of Dutch migrants. Interestingly, most of them are oriented toward cultural tourism. Two of the newcomer families breed horses, but agrotourism also inspires a revival of certain elements of folk culture. In some farms, old production techniques are cultivated, especially in the way of food production (dairy, bakery, herbalism) and how private museums (i.e., of weaving) are run.

In general, migrants have not inherited their holdings, but in the design of their homes and gardens they refer to the material heritage of folk culture more than their native neighbours, especially those who deal with agrotourism. Their relocation to the countryside was often preceded by visiting agrotourism farms, and since they usually belong to the middle class – the main target group of tourist services – they better understand the tastes of holidaymakers than native farmers. Moreover, most of the migrants in Ustronie keep some form of neighbourhood relations with the native inhabitants, and a group of them share the zeal for protecting the artistic heritage of the Polish countryside. As one participant said, *“I was really interested in such grass-root level work, for example, if this Danusia [a native neighbour cooperating in agro tourism – AW], a simple woman, will make wooden stairs to the house, instead of concrete, because I'll explain it to her why it is better to make the wooden ones, and she will do it. For me this is a dimension of my work, somehow preserving this cultural heritage, even at these stairs. Well, or other things. That she would have sold this cow long time ago, but she has it, but she knows that thanks to this cow she can still work in education and somehow make money. She did not demolish the bread oven in her house, because I say – Danusia, you will be selling tickets to this stove and you will get money for it.”*

Hence, the migrants are natural intermediaries in communicating these tastes to local owners of agrotourism farms. Migrants contribute their social capital to this activity in the form of contacts with urban circles of New Age and folk culture lovers, as well as skills and a willingness to organize co-operation between farms, leading to revival in the field of events [49]. They co-organize a festival during in which tourists can wander between agrotourism farms presenting their attractions and specialties. Especially noteworthy is the earliest migrant couple, which has organized an informal network of cooperation including direct neighbours that provide agricultural products and organize bread baking shows. On several other agrotourism farms, the couple carries out activities complementary to art workshops such as herbal workshops and hippotherapy. It makes Ustronie an educational complex with a variety of offers, especially for children and youth. They have also managed to mobilize the village community to install on nearby water sources a ceramic casing, which became another attraction of the village and the main destination for the afternoon strolls. It can be the example of the transformation of local knowledge, in which the change of one activity at the same time implies the change of the entire knowledge structure of the world, *illuminated by the social reflector of attention* [11]. Cultivated land becomes a space of artistic expression and a setting for tourist attractions.

### **Summary and conclusions**

To conclude, the influx of urban to rural migrants seems to be less a source than the *catalyst* of innovation in the rural culture. Based on the research conducted, there are several conditions that must be fulfilled before the newcomers can play such a role. First, the village must be a place of life for the migrants in a social sense, which also includes relationships that go beyond the household at the neighbourhood level through interactions, mutual help or cooperation. Interactions at the community level, through participation in village gatherings, or at least interest in the issues raised there, are also important. Rural culture is primarily communal, and introducing some innovation requires the recognition of the minimum rules of this community. In turn, introducing innovation depends upon the willingness of the migrants themselves, given modern technology, the state, and market opportunities to live alienated from local ties. Migrant households cannot, therefore, be extraterritorial enclaves to which they come by car to hide behind a high fence and an aggressive dog running alongside, which is a typical practice in the suburbs of big cities [41], but also in the most suburban part of Moczydło. There must also be a convergence of values between migrants and the residents in the sphere of life in which innovation occurs. Innovators must enjoy authority in this area of life among residents. Innovation itself must be coherent with the core values of both groups and confirmed through a credible presence in the migrants' way of life. Thus, migrants can serve as the innovation catalyst primarily in more peripheral villages where isolation from the neighbours is more difficult, and in places where families valuing the rural culture (sometimes imagined) and the values it represents are settling in.

The rapid cultural transformation of the countryside in Poland weakened the previous rural culture, but the inhabitants of the peasant origin preserve to some extent the core values constituting the former cultural identity. It is possible due to the lasting influence of the core values of the peasant culture, which form the habituses and cultural identities of the modern rural dwellers, thus influencing their ways of interpreting the occurring structural changes. New ideas and behaviours become innovations, when they are in line with the core values of the given culture. The influx of urban to rural migrants can carry innovation, even in the sphere

of agricultural activities. However, migrants remain a distinct category of inhabitants, and therefore their influence on the local population is limited (and vice versa).

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## **ACTIVITY OF RURAL WOMEN AS A DRIVER OF LOCAL GROWTH**

### **Abstract**

The purpose of this is to address the social activities of women living in rural areas, and especially the degree to which such activities are innovative. Special attention is given to innovations designed to improve the quality of life in local communities, to identify their needs and social problems, and to make attempts to address these. Data for this study comes from in-depth interviews with women who are particularly involved in various areas of social life in their local communities.

### **Key words**

rural women, local community, village, social involvement

### **Introduction**

In the field of economics, entrepreneurship is defined as a form of work or as the fourth factor of production. When considered as a form of work, it is also associated with certain character traits of entrepreneurs. It is assumed that entrepreneurs should be active, venturesome and adaptable. It is equally important that they be innovative and able to recognise and seize opportunities.

According to the Polish Language Dictionary [1], if someone is enterprising they act on their own initiative, and are willing and able to undertake various projects and successfully bring them to completion. Based on this definition, entrepreneurship, as a term, can be used not only in economic contexts, but also in relation to efforts aimed at the achievement of financial gain or other objectives.

In sociological terms, entrepreneurship is understood as behaviour based on seeking and responding to change, and using it as an opportunity to introduce social or economic innovations [2]. Approached this way, it can be understood as an aspect of social involvement. It is characterised by the active involvement of the individual in making a difference in their natural and social environments. Understood as social work, it means participation in group work that goes beyond one's professional and family roles, and is aimed at the achievement of social values. Social involvement is voluntary, spontaneous, free, and altruistic in nature. Given its purpose, social involvement can be considered in terms of social innovation, understood as a purposeful and beneficial change.

### **Determinants of the entrepreneurship of rural women**

The issue of social involvement of residents has been addressed in various sociological studies. Age, social milieu, and, less frequently, gender have been identified as differentiating variables for social involvement. Recently, this issue has been analysed in terms of social capital and institutional conditions. While more and more attention is being given to rural areas, the social and political activities of rural women are yet to be sufficiently explored. The situation of rural women is usually assessed in terms of their status within their families or professional roles.

The analysis of family roles shows that women receive insufficient support from institutions that provide care for children and older people. Moreover, in addition to their biological and production-related functions within their families, rural women serve many new roles associated with the increase in family requirements related to provisioning and cleaning, and modern attitudes toward children [3].

Studies on the professional careers of women more often address the issue of female entrepreneurship. A report prepared for the Polish Agency for Enterprise Development (PARP) shows that "Polish women are among the most enterprising women in the European Union (with approx. 35% of women having their own

businesses). Still, there is a clear disproportion between entrepreneurship among males and females – both in terms of the proportion of males and females who run their own business, and their business experience and the size of their business. Data show that while the average number of people hired by men who are not sole traders is 9, for women this number is 5. In addition, there are very few women who own large companies, i.e., with more than 250 employees” [4].

Enterprising women who create jobs often receive recognition for their significant contribution to the economic growth of the country. Many institutions and other initiatives are being launched to support them in their efforts. Such projects are usually designed to benefit women living in cities. It was not until the 3rd Congress of Women, organised in 2011, that the issue of rural women’s empowerment and entrepreneurship was addressed. A year later, the Congress set out to make rural women realise their enormous potential and to encourage them to create growth opportunities for their communities. Participants in the Congress identified major psychological, mental, financial, legal and institutional barriers to female involvement. They expressed the need for the development of empowerment programmes to call more attention to women in rural areas. Moreover, it is crucial that a professional contact network be developed to facilitate project funding and improve industry education.

In rural communities, women are expected to assume traditional social roles associated with the family, such as raising children and providing support on the farm. This is reflected in their system of values, where family is at the core and other areas of life are subordinated. Values associated with social mission, independence, and individualism are lower in the hierarchy. Cooperation and relationships with other people, leadership, involvement in decision-making, professional work and development are also considered important. The least important values are associated with having fun and taking an easy-going attitude to life. Women working on farms usually struggle with finding a job outside the farm, or with developing the farm itself. Professional and social aspirations of rural women are determined by their age, farm size, marital status, and position of each woman on their farm. It is more difficult for married and older women to be socially active, so they are less likely to have such aspirations [5].

There are no data on the participation of women in NGOs, and they do not have many representatives in local governments. They account for 25.4% of councillors in rural communes and 24.9% in rural/urban ones [6]. However, rural women are becoming more active in the areas of social and citizen involvement. As research shows, women are usually involved in informal social activities for the benefit of their local communities. They more often serve as village heads, which is a form of unpaid social work and does not entail any real authority [7].

The purpose of this analysis is to address the social activities of women living in rural areas, and especially the degree to which such activities are innovative. This refers to innovations designed to improve the quality of life (well-being, safety) in local communities. Such innovations are based on the identification of social problems and needs in a given community and constitute attempts to address these.

Data for this study comes from in-depth interviews with women who are particularly involved in various areas of social life, acting as local cultural and educational managers, or serving various local government functions. To investigate and win the trust of the study group, and to identify local leaders, I started from conversations with members of farmers’ wives associations (FWAs). The associations were selected based on The Best Farmers’ Wives Association in the Lubelskie Province, a contest organised in August 2016 by *Dziennik Wschodni*, a regional daily. The contest attracted 47 associations, which presented themselves in one of *Dziennik Wschodni*’s issues (Year XXII No. 151 of 5-7 August 2016). Having analysed the short descriptions of each association, I selected 15 associations for the study. What I focused on in those descriptions were features that made them stand out, such as village theme projects, efforts to improve the social situation of rural women and their families, the protection of women’s and family rights. There were also some interesting sentences in their self-presentations, like “In our society, there have always been charismatic women, activists and involved female citizens who could unite others around their ideas” (FWA Marynin), and “We are a group of cheerful, happy and active women who wish to support our local community” (FWA Kęblów).

This article is based on the assessment of 20 in-depth interviews. As the research project has only recently entered the implementation stage and has only one investigator, the sample is currently small. Nonetheless, the findings constitute a preliminary assessment of the issue at hand. Most respondents are members of FWAs



from the villages Czółna and Leśce. The in-depth interviews also helped me identify local leaders who were not directly involved in the associations' operations – the Head of the Communal Culture, Sport and Leisure Centre, the Deputy Head of Commune, the President of the Active Women Association, and a retired teacher, a greatly respected manager of cultural life, whose long-term commitment produced some objective successes.

Both towns investigated are part of rural communes located in the immediate vicinity of Lublin. Despite the short distance from the largest city in the region, both towns are located far from major transport routes, which, in a way, isolates them in spatial and social terms. In addition, both towns are agricultural in nature.

Social involvement as part of FWAs is driven mainly by the organisations' tradition and a desire to continue their operations. In both cases, this involves generational replacement within the organisation. But the ties between the generations are maintained only in symbolical terms and through continued operations. However, the forms of such operations are so different that this does not support actual cooperation. Furthermore, not wanting to provoke conflicts within the group, the older generation withdraws from active participation.

In their activities, respondents saw opportunities to put various ideas into practice. Moreover, they often emphasised aspects related to self-improvement. Membership of such organisations constitutes an incentive to leave one's comfort zone and overcome fatigue and inactivity. It provides motivation for making an effort, and helps maintain discipline in the achievement of goals. Women support one another in their efforts. This cooperation helps them learn from each other. Joint action is the opportunity to manifest and/or express various personalities – both leaders and contributors. Associations are a place to express oneself and often help tap latent talent.

What is also important is the pleasure provided by the opportunities to meet other people, get away from everyday responsibilities, and make enough room for oneself and for the satisfaction of one's needs – “When I'm fed up with everything, I want to get away from it all” (R2). “Work is work. I do it for financial reasons. You need to earn your crust some way. And there are household chores and the family, but I also need some space for myself. I need to meet my female friends. I need to go somewhere with them, see something, have a laugh, talk about some girly stuff that one of us wants to talk about that day. Share our experiences” (R3).

Women also provide support for each other – “(..) there are many women who joined (a painting workshop – author's note) while being in really bad shape psychologically, and their memory of it is positive”. They emphasise the importance of this connection, friendship, and joy derived from cooperation – “Being only for yourself, living for yourself, it bores me (...) I am the kind of person who loves teamwork. I like discussing, designing, and putting things into action together with other people. I am a gregarious type of person” (R18).

Often the motivation behind such involvement is altruistic – “For the benefit of other people. I think this is where it all started. Simply to organise this for those people. In autumn, when all the work in the fields is finished, we have more free time to prepare something, such as dinner. There's always a dinner, some treat, a cake or something” (R2).

The purpose of such actions is also to foster team spirit within the local community, or to take responsibility for it and encourage all residents to act as hosts on their town. Usually, this takes place through giving them opportunities for spontaneous action – “When we set out to do something, we do it together” (R18). The women studied considered it essential to forge a shared identity among local residents. This goal is often expressed explicitly, but sometimes it is the underlying objective of many actions taken to make the town stand out. The place of residence is considered very important. The outfits worn by FWA members, not necessarily similar to the regional traditional costume, emphasise their distinctiveness and represent their town of origin. The projects implemented are perceived as showpieces for the town. This often leads to competition between towns and stems from the desire to make one's presence known – “We joined the contest to feel appreciated, and to let other people know that there was such an association in Czółna. We do not just sit around, but we make our presence felt” (R2). An example of such a competition is the harvest festival wreath contest, which might generate considerable excitement, both during preparations and later, when the jury announces its decisions.

What encourages women to become socially involved is the tradition of public-spirited acts within their families. However, it is often more about being open to others, curious, and willing to help others, or having a

family of origin whose members have an extensive network of social connections. Still, many respondents did not report any of the above-mentioned circumstances as the motivation behind their decision to become socially involved. Therefore, it can be assumed that their involvement is the result of specific personality traits or a spontaneous, personal need.

The actions undertaken are usually local in scope and aimed at the broader community (St. Andrew's Day Party, New Year's Eve Party, harvest festival, holiday fairs, family parties) or at selected groups, e.g., the Senior Citizen's Day. It is important to note that of all the groups of residents that constitute potential target groups of such actions, the elderly are special. Their limited mobility, resulting from their health or the local transport infrastructure, loneliness from being away from their children, or employment and low income, all make this rural group isolated. Therefore, it becomes particularly important to organise Senior Citizen's Day – "They always turn up happy, because they know that they will be able to meet and talk to someone. Because, you know, nowadays, older people, when they need to go somewhere, they are driven to and from that place, right? And later, they are reminiscing 'oh, she got old' and 'she got this' and 'she got that'. Because people from the opposite ends of the village do not see each other often, right?" (R2).

Involvement of the women studied follows the traditional gender role model. Projects implemented by FWAs focus on activities traditionally performed by women, such as the organisation of social life, cooking, baking, and satisfying the needs of the family and children (family parties), and the elderly (Senior Citizen's Day). Moreover, women are expected to keep tradition and culture alive (harvest festival wreath weaving, preparing drama performances), organise educational activities, and take care of the aesthetic aspects of the surroundings. Secondary, instrumental, goals involve for-profit activities such as lending utensils and selling tickets to drama performances. This clearly shows that FWA objectives have evolved. A study by Barbara Tryfan, conducted in 1995, identified the following areas where FWAs had had the most successful track record: rural counselling, agricultural production improvement, fight for equal participation in power structures, professional qualification attainment, organisation of summer holidays for children, and combating alcoholism [8]. In addition, FWAs were involved in efforts to improve social and technical infrastructure, create new jobs, protect the environment, and provide assistance to low-income families, single mothers and families with many children. To some extent, these differences show how women's value systems have changed. Indeed, now altruistic and individualistic motivations, with the latter involving the need for self-development and social interactions, seem equally important. The institutional development of rural areas is equally important, especially in relation to social work, which has, to a certain extent, fulfilled the needs of rural residents in this area, and in turn has affected FWAs' areas of operation.

The outcomes of the activities undertaken are perceived by respondents mainly in terms of fostering bonds and local networking. FWA members invite and encourage people they have known since childhood and who are believed to have the right skills or attitude. Length of residence plays an important role, contributing to the development of strong bonds and social trust. It is an important precondition for building and strengthening bonding social capital – "A very talented person, has many skills and artistic talent and is an eloquent speaker; I remember her from school; she was inconspicuous and we kind of helped her come forward" (R18).

This does not mean, however, that social activities of women are broadly endorsed by their social milieu. This study confirms a claim by Danuta Walczak-Duraj [9] that in rural areas, gender-related stereotypes are perpetuated and there is rigorous social scrutiny. Any non-standard behaviour is either frowned upon or not treated seriously. Such behaviour includes the social involvement of women, perceived by others as "extravagant". Men, in particular, tend to have a traditional perception of female roles and a stereotypical attitude to women. By describing women as "witches who shake up the whole village", men refer to the negative image of women as being excessively talkative, nosy and focusing not on their family-related responsibilities but on the affairs of others, which is often associated with inquisitiveness and gossiping. Women's activities tend to be approached with certain forbearance as "harmless female folly" – "Most people are against us. I mean, in the village. There is this general feeling that we are everywhere. That the same moms are room mothers, members of the FWA, members of parents' associations, members of the fire service. Apparently, we are shaking up the whole village. And when other people don't like it, they organise witch-hunts, accusing us of bossing around and sticking our noses into everything. And it is not like that, because we do what we feel like doing and do not force anyone to do anything" (R3).

A serious obstacle women encounter while trying to achieve their objectives is the poor involvement of local communities and difficulty encouraging others to participate. Locals tend to show a passive attitude in that they are happy to participate in events organised by local associations but they do not help prepare them. Respondents say that local communities are not ready to become selflessly involved, they do not think of themselves as communities, and, consequently, do not feel responsible for the community. In many cases, the help provided is not selfless and people expect payment in return for completing some tasks.

Another obstacle is the lack of time, which results from the excessive workload that women have and all the household chores they are expected to carry out. In addition, they often care for their grandchildren and older family members. There is also the desire to have everything under control, an obstacle faced by women with particular personality traits or socialisation experiences – “I am unable to delegate responsibilities, so I accept all of them myself” (R1). It can be assumed that women socialised to serve the function of a family manager in relation to provisioning, health care, education and upbringing, free-time activities and household finances, tend to follow this pattern of behaviour also in their social activities.

The poor decisions of local authorities, who sometimes consider so-called “soft projects” as unnecessary, present a separate group of obstacles. Moreover, respondents mention competing regional interests of each town within the commune, and non-substantive reasons behind the decisions about the allocation of funds for projects implemented by local organisations. Since FWA projects rely on funding provided by commune offices, and the authorities are reluctant to support them, FWAs operate in an atmosphere of uncertainty.

One way to overcome those obstacles is to combine the membership of, and involvement in, many organisational forms. In that way, the same people are members of the association that runs a local school, FWA, and drama group. Depending on current needs, they focus on a particular organisation and devote special attention to it. As this approach involves a heavy additional workload, women delegate the implementation of individual tasks to ad hoc groups of residents and local partner organisations, such as schools, voluntary fire services, and community centres. Such cooperation involves spontaneous actions undertaken on an informal basis. Friendship, trust and a tradition of mutual help seem to be more important in this context. Extremely important resources are also provided by family and neighbours, as it is easier to obtain assistance from one’s immediate circle.

Schools play a special role in the empowerment of local communities. In a way, schools constitute a natural platform for the involvement of parents, which ultimately takes institutionalised forms – “Most of us started off when we were taking our children to primary school. And so we first started to meet at school, then became room mothers, members of [parents’ – MDz] associations, and so on. And then we decided that, you know, we could do something more somewhere...” (R3).

The scope of the institutionalised cooperation undertaken by the FWAs studied is not very wide. Such cooperation includes only District or Provincial harvest festivals and is established via Commune Offices. Such projects focus on the needs of local communities and are based on FWAs’ own resources. It seems that the FWAs studied are reluctant to go beyond their local context, and they are not likely to engage in cooperation with other entities or institutions from outside their commune.

To ensure their success, the studied organisations need leaders. While all respondents emphasised the democratic nature of decision-making when asked about the ways decisions are made in their groups, their subsequent answers clearly showed the presence of a dominant person in each group. Usually, that person was also chosen to be the formal leader. The leader is characterised by an above-average involvement and is the main initiator of projects undertaken by the group. Depending on the undertaking, leaders delegate responsibilities or assume full responsibility themselves.

Asked about the personality traits of enterprising women, interviewees mentioned enthusiasm, an action-oriented attitude, courage, determination and commitment. Other characteristics included creativity, an inquisitive mind, a sense of purpose in life and self-confidence. Important qualities also included effectiveness, ability to influence others, responsibility, and the ability to cope with failure and criticism. Traits supporting cooperation, such as having a conciliatory and understanding attitude, diplomacy and the ability to listen, were also considered important. Paradoxically, when asked whether they considered themselves to be enterprising women, respondents were not sure at first.

### Summary

Grażyna Kaczor-Pańkow [10] and Józef Koziński [11] identified two psychological elements necessary for economic success, namely a desire to prove oneself to others and a desire to achieve common good. In the sphere of social involvement, it can be concluded that even though women do not mention competition explicitly, it is visible in their actions. Without doubt, they also apply the idea of common good. Therefore, they meet all the conditions for success. Their innovations tend to follow traditional paths and are related to the areas characteristic for traditional female roles. However, funding opportunities have increased their scope and the number of forms of operation. They reach out to a larger number of people, and their projects are more distinct. New methods of operation call for new skills. Women sign up for courses and training (e.g., on how to draw up project applications), which further translates into an increase in their capital and effectiveness.

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## INNOVATION IN AGRITOURISM AS PERCEIVED BY STUDENTS OF UNIVERSITY OF LIFE SCIENCES IN LUBLIN

### Abstract

The article discusses the problem of innovation in agritourism, which was analysed based on literature on the subject and surveys conducted at the University of Life Sciences in Lublin among students enrolled in bachelor's and master's degree programs in Economics, Spatial Planning, Tourism and Recreation, and Landscape Architecture. The primary research problem is: do students acknowledge the important role of innovation in the development of agritourism in Poland? To gain deeper insight, it was also important to gather information about the opinions of the young people on the advantages of Polish agritourism and the factors driving its growth. The following research hypothesis is also put forward: "Young people value innovation in agritourism with regard to organisation and marketing; with regard to the agricultural product, they display a more traditional approach: scenic surroundings, traditional food, exposure to folklore, quiet surroundings, contact with nature," which has been confirmed by the study results.

### Key words

Innovation, tourism, agritourism, services, quality

### Introduction

Today's economical enterprises operate in a turbulent environment. One of the major challenges they face is handling the process of change management. Organisations must be flexible and react to changes quickly if they want to survive and grow, as changes are a factor that helps to address consumers' needs better. They also determine the competitive strength of an enterprise. Nowadays, tourism has become one of the most dynamically growing sectors of the economy and provides a fundamental direction for rural development. It also helps reduce unemployment in rural areas and can be a source of income for the rural population. One interesting question is how the aspect of innovation can be reconciled with the aspect of tradition with regard to agritourists' needs. The values of agritourism include the natural environment, tradition, folklore, and culture. Due to the transformation going on in the world, however, the preferences of individuals are changing, and people aim to increase the quality of their life and leisure. Customers expect increasingly better tourism infrastructure, increasingly better service, new attractions, and improved forms of marketing communication in the tourism market, including the agritourism market. As a result, service providers are introducing an innovation policy. Innovation in agritourism farms can now involve the farm management process, marketing and a range of available products. In the field of management, knowledge management produces good results. Knowledge has become a critical driver of competitiveness in today's society. Innovative actions are determined by human capital and human resources.

Because innovation in agritourism is not homogeneous, as an agritourist values tradition and the rural way of life, the article aims to determine, based on surveys conducted among students of the University of Life Sciences in Lublin, which components and in which areas of agritourism (product, marketing, organisation) should be subject to innovation, and which ones should remain in line with tradition. It should be noted, at the same time, that agritourism itself can be viewed as innovative. Innovation in agritourism involves the need to implement commercialisation, create a branded product, and carry out quality-oriented actions. It also involves a professional approach, effective marketing, and cooperation between service providers in rural areas. The objective of the article is to draw attention to the problem of innovation as a component of organisational changes in agritourism enterprises. The following hypothesis is proposed: innovation with respect to organisation and marketing is appreciated in agritourism business. As far as the product is concerned, however, a more traditional approach prevails. The survey was conducted in 2016 and administered to 82 students of the University of Life Sciences in Lublin. For interpreting the results, survey methodology was used and relevant literature was analysed.

**Innovative solutions in tourism and agritourism: theoretical problems**

Tourism has grown to be an important sector of the national economy in many countries of the European Union and worldwide. It is also a factor triggering the socio-economic recovery of individual countries and regions. Globalisation has significantly influenced the functioning of the market, thus drawing attention to the importance of competitiveness and the innovativeness of activities. Innovativeness is a fundamental component of creating EU economic policy and has been a major objective of the development strategy of EU countries under the Lisbon Strategy.

The idea of innovativeness is often discussed in relevant literature, articles, press and media. In many cases, it is understood intuitively. Usually, innovativeness is considered as a factor determining the socio-economic growth of businesses and countries. According to Drucker, innovation involves making changes, as changes lead to the emergence of new products and services [1]. Schumpeter views innovation as the introduction of a new solution or invention in an enterprise [2] and points out that there is a wide spectrum of innovation, including technological innovation, economic innovation, and change-oriented actions. Nowadays, innovation contributes to economic growth by creating demand [3]. Literature on the subject points out two models of the innovation process. The first is the supply-driven innovation model, triggered by scientific research that leads to technological progress, which implies new technology processes and new products. The second is the demand-driven innovation model, which is triggered by the realisation of social needs [4]. A networked model has also been proposed, where “innovation occurs as a result of a feedback loop between technical capabilities and needs, and the interactions between science, technology and deployments within businesses” [5]. According to the OECD, innovation may involve the product, service, process, marketing, or organization [5]. In today's economy, innovation is considered a continuous process [6]. The notion of innovation as a quality of individual entities as well as whole countries and economies is understood as “the ability to make innovations in a broad sense” [7]. Innovation is the foundation of a knowledge-based economy and one of the essential factors of competitiveness. Innovation policy plays a dominant role in economic growth and is more complex than it might seem [8]. The issues of innovation are mainly related to production activity. However, the growing sector of services, including tourism services, has also seen innovative solutions to improve competitiveness.

Just like any business activity, tourism needs innovation [9]. Some definitions of service innovations include “attempts to gain the competitive edge by defining and implementing new and better ways to compete on the market; [...] new services or fundamental changes to the existing services, service processes or ways to provide services; ideas, actions or tasks that are novel to the organisation and its environment; the development of service products that are novel from the supplier's perspective; a new or fundamentally changed service, form of interaction with the customer, service provision system or technology which, individually or in conjunction with each other, lead to new service functions or enable the existing functions to be upgraded. The implementation of changes requires human, technological or organisational skills” [10]. Therefore, it seems that innovation in the field of services has a very wide scope and can involve new products, services, methods of service provision, new organisational and management solutions, marketing, logistics, and customer relations.

The stagnation of agriculture and the difficult situation of farmers have caused them to look for new sources of income. Agritourism seems to be an effective solution. Urban dwellers are increasingly interested in the agritourism opportunities offered by farmers. Competitive market conditions favour the ones whose offer is attractive and stands out. Spending free time in the countryside is not anything new in Poland, where the history of agritourism dates back to the mid-19th century. “Agritourism is a type of leisure which takes place in rural agricultural areas and is based on accommodation facilitates and recreational activities related to a farm or an equivalent area and its natural, production and service environment” [11]. Unlike agritourism, rural tourism is limited to offering accommodation services in rural areas and does not involve tourists taking part in farm work. Rural tourism is defined as “a type of leisure in rural areas involving nature, landscape, cultural heritage and buildings, which is arranged on a scale that does not harm the environment and local community, and which bears all the hallmarks of sustainable tourism” [12]. Agritourism requires accommodation and a specific scope of services. Rural tourism also involves the construction and development of technical, economic and social infrastructure, and is therefore a broader concept. Agritourism and rural tourism provide communes with growth opportunities.

A group of tourists has now emerged who are sensitive to eco-innovation in their perception of the tourism attractiveness of a region. This results from the increasing ecological awareness. Agritourism does not necessarily adhere to the standards of eco-innovation [9]. This occurs then the operation contrasts with eco-friendly solutions. Eco-innovations in eco-tourism “best meet human needs in this regard (products, processes, marketing and organisational actions), meet the sustainability standards related to the tourist's health (including physical, mental, social and spiritual health), food and physical activity, aim to preserve the ecosystem for future generations, draw inspiration from nature, and pose no risk. Eco-innovations are often the return to what we already knew but thought it could be done differently and better” [9]. Eco-innovations are not limited to the sector of modern technologies. For example, the return to nature can be an eco-innovation as well [9]. Eco-tourism, in turn, has many definitions. One of them points out, simply and succinctly, that it is “travelling to nature in a way that contributes to its protection” [13].

As the literature demonstrates, today's agritourism farms have many options when it comes to competing on the market. To achieve success, however, knowledge must be skilfully translated into innovations. This, in turn, is determined by the implementation of a knowledge management concept. The concept of knowledge management was introduced by Wiig in 1986 at a conference for the International Labour Organisation held in Switzerland. [14]. “The market competitiveness of an enterprise can be achieved mainly when the company creates an innovative image, provides a demanding customer with in-house solutions, special products, or even sales methods” [14]. An enterprise can grow due to innovative products/services, improved customer access channels, good image, new added values, and addressing a specific segment of the market and, new niches. Research by a Jagiellonian University team from 2006 [9] shows that the most critical factors driving innovation in tourism enterprises are the ability to adapt the offer to the individual needs of tourists, knowledge about the behaviours and strategies of competitors, and the knowledge and skills of employees.

The agritourism market in Poland has great potential. Its strength lies in the supply of services, and its weakness is the structure of demand [15]. Until quite recently, countryside vacations were associated with less-than-affluent tourists and family holidays spent in a rather passive way, but this is now changing. Agritourism has been increasingly associated with active leisure and a larger number of attractions. Tourists expect to have a wider and more comprehensive range of available services.

#### **Research methodology: survey analysis and results**

The study was conducted among 82 individuals, including 62 females and 20 males in 2016. Respondents were students of the University of Life Sciences in Lublin pursuing bachelor's and master's degree programmes in Economics, Spatial Planning, Tourism and Recreation, and Landscape Architecture. Most respondents were female because more females study the programmes covered by the survey. The results did not fundamentally differ between male and female respondents, however. The background of respondents was similar, with more than 60% respondents were from rural areas or small towns. The survey included 16 questions related to 3 themes: product innovation, organisation, and marketing. The questionnaire used quantitative methods.

There are two primary research questions. Do students acknowledge the important role of innovation in the development of agritourism in Poland, or do they favour traditionalism? What is the meaning of innovations to students, and in which areas do they see the need for new solutions in agritourism? Besides the main objective of the study, it was also important to gather information about the opinions of young people on the advantages of Polish agritourism and the factors driving its growth.

A general research hypothesis was formed: Young people value innovation in agritourism with regard to organisation and marketing, but with regard to the product, they display a more traditional approach.

Respondents understand the concept of “innovation” as new solutions. This was the meaning of innovation according to 56 people (of which 15 male). As Table 1 demonstrates, 11 people associated innovation with modernity, 8 people with modernization, 6 with improvement, and one with unconventionality.

Table 1. Understanding the term of "Innovation"

Innovation	Females %	Males %	Overall %
New solutions	66.13%	75.00%	68.29%
Modernity	16.13%	5.00%	13.41%
Modernisation	6.45%	20.00%	9.76%
Improvement	9.68%	0.00%	7.32%
Unconventionality	1.61%	0.00%	1.22%
Total	100.00%	100.00%	100.00%

Source: own work based on survey

Young people were in favour of innovative solutions on an agritourism farm. For example, 15 females and 8 males pointed out that the use of the Internet for business operation was important. Two females and 8 males said that comfortable conditions were most important. Infrastructure for the disabled was most important for 5 females. According to 17 females and 4 males, it was infrastructure for active leisure, such as a swimming pool or tennis court. Only one female was in favour of fast food. This question was a multiple-choice question with ranked responses. The results show that the young people see a need to innovate mainly in the fields of organisational and promotional activity (see Table 2).

Table 2. Innovative solutions on an agritourism farm

Innovative solutions	Females %	Males %	Overall %
Internet	40.32%	40.00%	40.24%
Comfort	3.23%	40.00%	12.20%
Infrastructure for the disabled	8.06%	0.00%	6.10%
Infrastructure for active leisure	41.94%	20.00%	36.59%
Fast food	1.61%	0.00%	1.22%
Traditional cuisine	4.84%	0.00%	3.66%
Total	100.00%	100.00%	100.00%

Source: own work based on survey

However, respondents were also in favour of traditional solutions in agritourism that apply to the product. 36 females and 8 males were in favour of in-house food products such as charcuterie, cheese, and fruit). Only 2 respondents, including 1 male and 1 female, picked carriage rides. Sleigh rides were important just for 2 people (1 female and 1 male). Only 1 female picked angling a pond on an agritourism farm. 6 females and 2 males thought that contact with animals was important when spending time close to nature. 4 females and 4 males were in favour of traditional cuisine, while 3 females and 4 males were in favour of participation in farm work. Cake baking was most important for 3 females. For 5 females, it was most important that the hosts should arrange a bonfire. 2 females were most interested in a pottery workshop where visitors could learn to make pots (see Table 3).

Table 3. Traditional solutions in agritourism

Traditional product	Females %	Males %	Overall %
Food, cheese, charcuterie, fruit	58.06%	40.00%	53.66%
Carriage rides	1.61%	5.00%	2.44%
Sleigh rides	1.61%	5.00%	2.44%
On-site pond, angling	1.61%	0.00%	1.22%
Farm Animals	9.68%	10.00%	9.76%
Traditional cuisine	6.45%	20.00%	9.76%
Participation in farm work	4.84%	20.00%	8.54%



<b>Traditional product</b>	<b>Females %</b>	<b>Males %</b>	<b>Overall %</b>
Cake baking	4.84%	0.00%	3.66%
Bonfire	8.06%	0.00%	6.10%
Pottery	3.23%	0.00%	2.44%
Total	100.00%	100.00%	100.00%

Source: own work based on survey

The results are based on a multiple-choice question with ranked responses and confirm the hypothesis that it is the traditional rather than innovative product that tourists expect. This is in line with the observation made in the theory section that the return to nature and tradition is itself an innovation. This product is mainly in-house food. The situation looks different in the field of promotion. According to 61 respondents (50 females and 11 males), the most effective promotional instrument today is the internet. Advertising brochures are most essential for 6 females and 4 males. 3 respondents, including 2 females and 1 male, pointed out press advertisements as most effective. For 4 females and 2 males, tourist information plays the biggest role. Social media and videos play an important role according to 1 male (see Table 4).

Table 4. Most effective promotional instrument

<b>Promotion</b>	<b>Females %</b>	<b>Males %</b>	<b>Overall %</b>
Internet	80.65%	55.00%	74.39%
Brochures	9.68%	20.00%	12.20%
Press advertisements	3.23%	5.00%	3.66%
Tourist information	6.45%	10.00%	7.32%
Social media	0.00%	5.00%	1.22%
Promotional videos	0.00%	5.00%	1.22%
Total	100.00%	100.00%	100.00%

Source: own work based on survey

Students have a positive view of the growth opportunities for agritourism in Poland. 17 respondents, including 4 males, found the growth opportunities to be very good. According to 37 females and 10 males stated that they were good, while 12 females and 6 males stated that they were average. As can be seen, the vast majority of respondents think that Poland offers good opportunities for agritourism development (Table 5).

Table 5. Growth opportunities for agritourism in Poland

<b>Perception of agritourism growth opportunities</b>	<b>Females %</b>	<b>Males %</b>	<b>Overall %</b>
Very good	20.97%	20.00%	20.73%
Good	59.68%	50.00%	57.32%
Average	19.35%	30.00%	21.95%
Total	100.00%	100.00%	100.00%

Source: own work based on survey

In the opinion of most respondents, agritourism growth opportunities are determined by the attractiveness of a region's location. The largest number of respondents (31 females and 12 males) found mountain areas to offer the best opportunities for agriculture development. Surprisingly, only 3 females and 2 males pointed out the northern part of the country and the seaside. This might have been because many young people from south-eastern Poland (especially with a rural background, as is the case with the students of the University of Life Sciences in Lublin) have never been to those regions and do not know them. 17 females and 2 males pointed out Lubelszczyzna, and 11 females and 4 males printed out Masuria as regions offering development opportunities for the growth of agritourism (Table 6).

Table 6. Location of the region vs. perspectives

Location of the region vs. perspectives	Females %	Males %	Overall %
Mountain areas	50.00%	60.00%	52.44%
North of the country, seaside	4.84%	10.00%	6.10%
Lubelszczyzna	27.42%	10.00%	23.17%
Masuria	17.74%	20.00%	18.29%
Total	100.00%	100.00%	100.00%

Source: own work based on survey

Students were divided on whether the agritourism product should be modified. 31 females and 11 males thought that it should be modified, whereas 31 females and 9 females stated otherwise (Table 7).

Table 7. Agritourism product modification

Agritourism product modification	Females %	Males %	Overall %
Yes	50.00%	55.00%	51.22%
No	50.00%	45.00%	48.78%
Total	100.00%	100.00%	100.00%

Source: own work based on survey

The responses confirm the hypothesis proposed at the beginning that production innovation is not as obvious as innovation in the field of agritourism business itself.

Most respondents, 49 females and 14 males, believed that changes implemented in agritourism should be motivated by the opinion of tourists. Growing competition was most important for 12 females and 4 males, while declining income was pointed out by 2 males and 1 female (Table 8).

Table 8. Reasons to modify product

Reasons to modify product	Females %	Males %	Overall %
Opinion of tourists	79.03%	70.00%	76.83%
Competition	19.35%	20.00%	19.51%
Declining income	1.61%	10.00%	3.66%
Total	100.00%	100.00%	100.00%

Source: own work based on survey

Improved products spark increased tourist interest according to 54 females and 15 males. Only 5 males and 8 females believed that product improvement was irrelevant (Table 9).

Table 9. Product improvement affects performance

Product improvement affects performance	Females %	Males %	Overall %
Yes	87.10%	75.00%	84.15%
Irrelevant	12.90%	25.00%	15.85%
Total:	100.00%	100.00%	100.00%

Source: own work based on survey

Students have a good knowledge about the situation in the Polish agritourism market. 36 females and 13 males said that the Polish agritourism market was highly competitive, while 2 females responded that there was no competition, and 23 females and 7 males found competition to be moderate. These responses show that the young people are aware of the competition level in the industry. Consequently, it can be assumed that they realise the need to take actions aiming to increase competitiveness (Table 10).

Table 10. Competition

Competition	Females %	Males %	Overall %
Strong	58.06%	65.00%	59.76%
Moderate	38.71%	35.00%	37.80%
None	3.23%	0.00%	2.44%
Total	100.00%	100.00%	100.00%

Source: own work based on survey

In the context of the study, it was important to learn what determines success in the agritourism industry according to respondents. Students were presented with a multi-choice question and could rank their answers. 13 females and 7 males regarded interesting products and services as the determinants of success. 3 females pointed out that new organisational solutions and new forms of management were most important. Marketing and promotion innovations were most important for 4 females and 1 male. The most important factor, however, turned out to be an interesting location, which was picked by 40 females and 12 males (Table 11).

Table 11. Determinants of success

Determinants of success	Females %	Males %	Overall %
Interesting product	24.19%	35.00%	26.83%
New forms of management	4.84%	0.00%	3.66%
Marketing innovations	6.45%	5.00%	6.10%
Interesting location	64.52%	60.00%	63.41%
Total	100.00%	100.00%	100.00%

Source: own work based on survey

Most respondents believed that higher education in a relevant field was an asset for running an agritourism business (49 females and 12 males). 13 females and 8 males did not answer (Table 12).

Table 12. Education affects chances of success

Education affects chances of success	Females %	Males %	Overall %
Yes	79.03%	60.00%	74.39%
No opinion	20.97%	40.00%	25.61%
Total	100.00%	100.00%	100.00%

Source: own work based on survey

The young people pointed out that the attractiveness of the location of an agritourism enterprise, which is independent of human knowledge and qualifications, played an important role in agritourism development. At the same time, they found in-depth knowledge to be helpful and essential for achieving success in the agritourism industry. For that reason, all respondents realise the need to know the basic principles of business organisation and management. The responses confirm the need to expand and manage knowledge, a problem discussed in the theory section.

Proficiency in foreign languages is also important for running an agritourism business. Only 2 females and 2 males thought that it was unimportant. The remaining 78 respondents found language proficiency to be essential. English was pointed out as the most universal and desirable foreign language by the largest number of respondents. The responses to this question suggest that students see opportunities to develop agritourism in Poland with a focus on foreign tourists as well. Unfortunately, the following responses do not confirm this. (Table 13).

Table 13. Foreign language proficiency and success

Foreign language proficiency and success	Females %	Males %	Overall %
Yes	96.77%	90.00%	95.12%
No	3.23%	10.00%	4.88%
Total	100.00%	100.00%	100.00%

Source: own work based on survey

According to respondents, agritourism farms are mostly visited by city dwellers according to 12 males and 41 females. Visitors were mostly families with young children according to 8 females, and according to 1 female they were mostly tourists from abroad. One female stated that the elderly were the most common visitors, while 6 females and 2 males stated that young people were. 3 females and 4 males believed that less affluent tourists most frequently visited (Table 14).

Table 14. Agritourism farm visitors

Agritourism farm visitors	Females %	Males %	Overall %
City dwellers	69.35%	66.67%	68.75%
Families with young children	12.90%	0.00%	10.00%
Foreign tourists	1.61%	0.00%	1.25%
The elderly	1.61%	0.00%	1.25%
The young people	9.68%	11.11%	10.00%
Less affluent individuals	4.84%	22.22%	8.75%
Total	100.00%	100.00%	100.00%

Source: own work based on survey

The dominant response was city dwellers. The reasons provided by students mainly included the limited contact with nature in a city and the willingness to experience it up close. The advantages of agritourism pointed out by respondents were diverse. The most frequent responses to multiple-choice questions with ranked answers were good communication links according to 7 females and 2 males. Having scenic surroundings was most important for 22 females and 11 males, while 1 female stated that good road quality was most important. Traditional food (3 females and 1 male), exposure to folklore (1 respondent), quiet surroundings (6 females), contact with nature (12 females and 3 males), and the organisation of free time in a novel and interesting way (10 females and 3 males) were also important factors (Table 15).

Table 15. Advantages

Advantages	Females %	Males %	Overall %
Good Communications links	11.29%	10.00%	10.98%
Scenic surroundings	35.48%	55.00%	40.24%
Good road quality	1.61%	0.00%	1.22%
Traditional food	4.84%	5.00%	4.88%
Exposure to folklore	1.61%	0.00%	1.22%
Quiet surroundings	9.68%	0.00%	7.32%

Advantages	Females %	Males %	Overall %
Contact with nature	19.35%	15.00%	18.29%
Organisation of free time	16.13%	15.00%	15.85%
Total	100.00%	100.00%	100.00%

Source: own work based on survey

### Conclusion

The goal of this study was to point out the role of innovation in the development of agritourism in Poland. The responses to the presented questions confirm the hypothesis put forward in the article. Students expect agritourism services to offer a traditional product, such as featuring certain traditional elements like traditional food or cuisine or in-house food products. The main advantages of agritourism, in their opinion, include scenic landscapes, contact with nature and a peaceful atmosphere. Some of them also expect that a stay in a beautiful place should be arranged in a novel and interesting way. Responses about product modification are split almost equally. However, most respondents think that an agritourism product should be modified, changed, or improved, but only as long as it does not lose its traditional and natural quality. In field area of marketing, the young people are in favour of innovative solutions. 61 people agree that web sites are most effective for running an agritourism business. In the respondents' opinion, there is a need to expand specialist knowledge, including about the principles of business organisation and management, and foreign language proficiency. While few students pointed out foreign tourists among the groups visiting Polish agritourism farms (only 1 person), they do acknowledge that Polish agritourism has a potential to target those visitors. In the field of organisation, they realise the need to innovate. They point out the importance of comfortable leisure, accommodation conditions and the use of infrastructure, such as swimming pools or tennis courts, for active leisure. Respondents would like to be provided with a ready-made offer of free time activities. Innovation, according to the students of the University of Life Sciences in Lublin, mainly involves new solutions. This leads to a conclusion that for a tourist farm to be competitive, which many perceive this industry to be, it must implement new solutions. Generally, the young people see potential for the development of agritourism in Poland, although they think its promotion is inadequate. Most respondents were in favour of the innovations that were defined as eco-innovations in the theory section. The diversity of responses to questions about the choice of attractions and leisure activities indicates that the contemporary holidaymaker using agritourism services requires an individual approach.

### Appendix nr. 1: Questionnaire of the survey

Male/Female

1. Innovation is:
  - a) New solutions
  - b) Modernity
  - c) Modernisation
  - d) Improvement
  - e) Unconventionality
2. What are the innovative solutions in the enterprise property that you think are most needed to increase the chances of success of the company? (please number validity scale)
  - a) Internet
  - b) Comfort
  - c) Infrastructure for the disabled
  - d) Infrastructure for active leisure
  - e) Fast food
  - f) Traditional cuisine
3. What traditional solution could increase the competitiveness of business tourism? (please number validity scale)
  - a) Food, cheese, charcuterie, fruit

- b) Carriage rides
  - c) Sleigh rides
  - d) On-site pond, angling
  - e) Farm animals
  - f) Traditional cuisine
  - g) Participation in farm work
  - h) Cake baking
  - i) Bonfire
  - j) Pottery
4. What forms of promotion are most effective?
- a) Internet
  - b) Brochures
  - c) Press advertisements
  - d) Tourist information
  - e) Social media
  - f) Promotional videos
5. How would you rate rural tourism development in Poland?
- a) Very good
  - b) Good
  - c) Average
  - d) Bad
  - e) Very bad
6. Which Polish regions have the greatest opportunities for growth based on rural tourism?
- a) Mountain areas
  - b) North of the country, seaside
  - c) Lubelszczyzna
  - d) Masuria
7. Should be the product modified?
- a) Yes
  - b) No
8. What should affect changes in agritourism?
- a) Opinion of tourists
  - b) Competition
  - c) Declining income
9. Are tourists interested in an improved product?
- a) Yes
  - b) No
  - c) Irrelevant
10. How is the market competitiveness of economy in agritourism?
- a) Strong
  - b) None
  - c) Moderate
11. What determines the success of the business in this industry?
- a) Interesting product
  - b) New forms of management
  - c) Marketing innovations
  - d) Interesting location
12. Is higher education helpful in the conduct of an agritourism enterprise?
- a) Yes
  - b) No

13. Is knowledge of foreign languages helpful in the conduct of an agritourism enterprise?
- a) Yes
  - b) No
14. Who stays at the farm?
- a) City dwellers
  - b) Families with Young children
  - c) Foreign tourists
  - d) The elderly
  - e) The young people
  - f) Less affluent individuals
15. What is most important for a tourist in the farm`s location?
- a) Good communication links
  - b) Scenic surroundings
  - c) Good road quality
  - d) Traditional food
  - e) Exposure to folklore
  - f) Quiet surroundings
  - g) Contact with nature
  - h) Organisation of free time

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## **SOCIAL ECONOMY IN BAŁTÓW AS SOCIAL INNOVATION**

### **Abstract**

The article discusses problems of joining of social economy and social innovation, illustrated by the example of activities undertaken in the last decade in the rural commune of Bałtów (Świętokrzyskie voivodship). In the theoretical section, I present the context of emergence of social innovations in Europe and some of their definitions. In the empirical section, I depict the development of social entrepreneurship initiatives in Bałtów commune based on the case study conducted in 2013 and analyse them in the context of social innovation.

### **Key words**

Social innovations, social economy, local community, social change, clusters.

### **Introduction**

Both the concept of social economy and social innovation emerged in the public discourse in the context of searching for solutions that would effectively cope with the challenge of the consequences of global processes, especially the crisis of the welfare state or, more broadly, the global economic crisis [1]. While both issues are rooted in the 19th century, they gained particular importance in the 1990s, mostly due to the promise they held for the growing social problems. They were perceived as an alternative to market solutions, which failed to give a remedy to the challenge of growing social inequality, and the social exclusion of individuals and entire regions. In the case of social economy, the values discussed included reciprocity, responsibility and economic sovereignty. In the case of social innovation, there was a broad inclusion of stakeholders and a focus on grass-root, experimental, and network-based initiatives.

Social economy as a specific form of social activity is based mainly on trust. When people get involved in joint undertakings, they are able to cooperate and trust each other, which allows them to take risks together [2]. This approach is of key significance in coping with the effects of economic crisis, when it becomes necessary to launch social mechanisms, such as social trust or openness to innovative solutions [3]. Cooperatives, as well as development of network-based relations popularized in the 1990s in social organizations and enterprises, stimulated interest in the issues of social innovation in Europe [3].

The European Union played a quite significant role in the popularization of both issues, which stimulated interest in the field through its programmes and initiatives. In 2006, community initiatives aimed at solving problems common to all member states were launched. In the context of social innovation, the most important one was the EQUAL initiative, providing the space for testing of innovative approaches to labour market policies and programs. There was also the LEADER programme, launched as a part of the rural development scheme, which promoted a grass-roots, partnership-based approach to social development in which local community representatives were to come up with development strategies and innovative projects, combining human, natural, cultural and historical resources [3]. On the other hand, within the framework of structural funds in the financial perspective of 2007 – 2013, emphasis was put on supporting innovation and mainstream into the social policy of each operational programme [4].

This meeting of social innovation and social economy is the significant context for this study. Its aim is to analyse the phenomenon of social entrepreneurship in Bałtów commune as a pioneering example of social innovation in the rural areas in Poland.

### **The concept and the context of social innovation**

Social innovation remains one of the key issues in EU policy. In the Europe 2020 strategy, they are the instruments that may contribute to solving of the most important social problems of Europe. The European

Commission (EC) has undertaken to “design and implement programs to promote social innovation for the most vulnerable, in particular by providing innovative education, training and employment opportunities for deprived communities to fight discrimination [5]. Social innovations are also present in many political initiatives of the EC, such as the "European Platform against Poverty and Social Exclusion", the "Innovation Union", the "Social Business Initiative", the “Social Investment for Growth and Cohesion, including implementation of the European Social Fund for the years 2014–2020”.

The meaning of social innovation has changed over time. Initially, it was perceived as the effect of technological innovation. However, as the industrial society shifted to the society of knowledge and services, the paradigm of the system of innovations changed [6], leading to a substantial transformation of the relationship between technological and social innovations. According to the new approach to innovation, the significance of institutional and social networks is growing. The correlated representatives of institutions and social actors interact with each other develop, test and popularize the new modes of action [7]. Moreover, according to the new approach, society is becoming the focus of innovation, unlike in the past when political programmes for social development were based on scientific diagnoses and recommendations. At present, innovations have become the tools for improving the well-being of our society [8].

Social innovations, however, do not share a common definition [1]. Howalt and Schwarz describe social innovations as component of the processes of social change, which are the most important general cause of social change [6]. Participants of the implementation process are various social groups, including professionals and community activists. The change usually takes place as a process and rarely as a single-time action. Social innovations include experiments aimed at improving the quality of life of individuals, communities or entire nations [9]. On the other hand, the EC puts emphasis on the fact of creation of new relations and cooperation. Social innovations can be defined as the development and implementation of new ideas (products, services and models) to meet social needs and create new social relationships or collaborations [10].

It would not be possible to discuss all definitions of social innovations that are present in the discourse. On the other hand, it does not seem necessary. It is enough to conclude that it would be difficult to find an approach that could be described as entirely inconsistent with Bałtów initiatives. Their hallmarks are development and change. The case of Bałtów has been discussed in several press articles and brochures, but these have already become outdated. The conditions change every 2 to 3 years, and innovations are being introduced at various levels and in different areas. In the further part of the study, I will discuss individual solutions, which fit into various approaches to social innovations.

### **Methodology**

This study was prepared based on a report for the Institute for Public Affairs of 2013, dedicated to social entrepreneurship in Bałtów [11]. It was one of the case studies selected for analysis of social enterprises in Poland. The case studies differed in terms of their size, geographical location, legal status, structure of income, marketing tools and the image building strategy. The objective of this undertaking was to identify the factors of sustainability of social enterprises that impact the duration and development of such entities in Poland. Their ability to achieve the established social and economic goals and to maintain the potential for development was also of interest [12]. This research objective required an in-depth analysis of the complexity and diversity of the enterprises. It also examined their history, objectives, social and economic dimensions of the tasks undertaken, rooted in the local community, the social capital and the legal environment.

Obtaining such a holistic view was possible through the use of a case study research strategy, which conducts an analysis of processes within their context. No social phenomenon may be fully understood if analysed in isolation from its context, "but is of interest precisely because the aim is to understand how behaviour and/or processes are influenced by, and influence context" [13]. Moreover, case study is a research strategy focusing on understanding the dynamics of a single arrangement [14].

Within the framework of such a research procedure, interviews were conducted with many stakeholders of Bałtów initiatives in July 2013, including the management of the complex (the director of the association and the vice president of the association), 3 employees of these institutions who were responsible for marketing, investments and project coordination, the head of Bałtów commune, and two inhabitants who run an agritourism farm and cooperate with the above associations. Moreover, various documents of the enterprise

were analysed, including the strategic documentation of the entities under study and the commune, working documents and Web pages, statistical data, studies and press articles discussing the Bałtów initiatives.

### Development of social entrepreneurship in Bałtów

Presenting the phenomenon of social entrepreneurship in Bałtów, it is necessary to mention that we are dealing not with a single entity, but a conglomeration of many entities and initiatives, characterized by a complex structure in terms of organization, legal status and ownership. Some are aimed mainly at economic, while others are aimed at social objectives, maintaining a relatively good balance between the two (Fig. 1). In this study, I will refer to these shortly as the "Bałtów conglomeration", referring to the network of entities, aiming to achieve a shared goal, which is sustainable development of Bałtów commune.

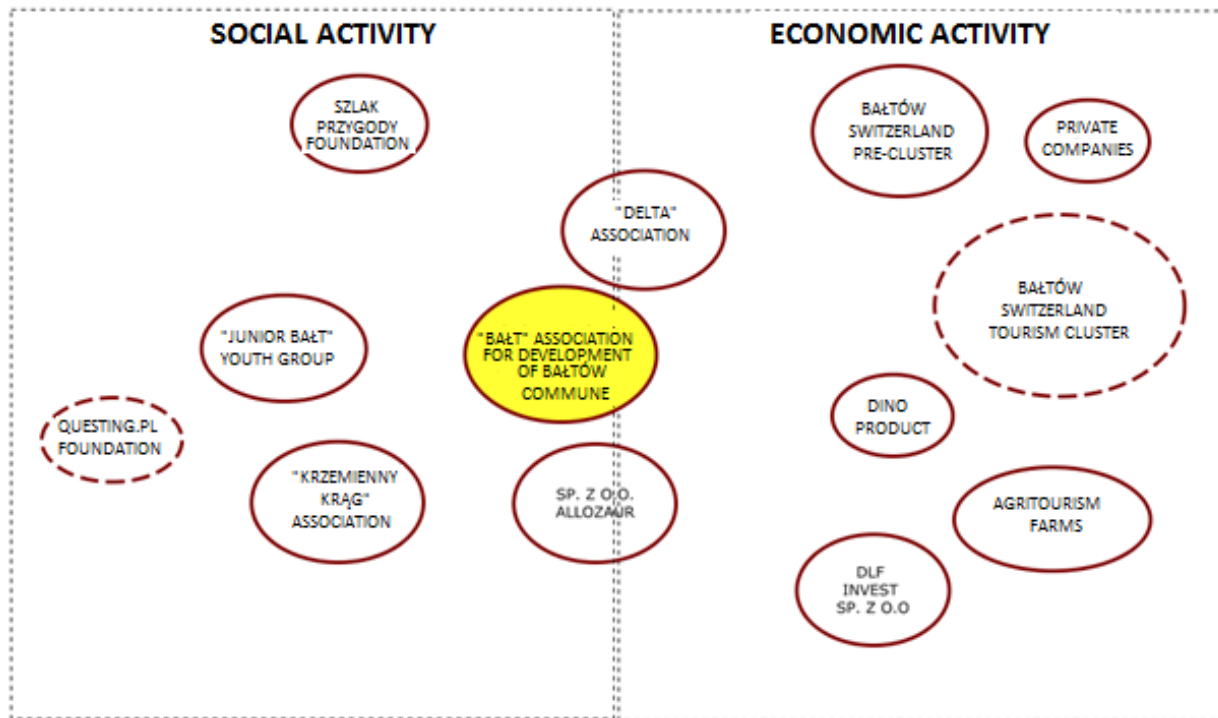


Fig. 1 The organisational structure of the Bałtów complex (2013)

Source: Author's.

The history of social entrepreneurship in Bałtów starts in 2001, when it was a backward commune<sup>1</sup>, lacking a vision of development, with many weaknesses in terms of the so-called "hard" infrastructure like roads, sewage and water supply systems, telecommunication or computer networks, as well as the "soft" infrastructure", consisting of human and social capital, weak-developed civic society (including non-governmental organizations). At the time, the "Bałt" Association for Development of Bałtów Commune was established ("Bałt"). The initiator was a local entrepreneur who was a co-owner of the meat processing plants and one of the major employers of the region. He was dedicated to his region and a social activist. According to the founding myth, he was deeply concerned about the village, set in a beautiful landscape, but untended, forgotten and godforsaken.

The association was established to support the local folk group, organize trainings and give advice to farmers, craftsmen and agritourism farms, and to contribute to development of local folk craftsmanship. The organization was to be involved in social, educational and economic activity. It was agreed that the driving

<sup>1</sup> The commune of Bałtów consists of 16 villages. In 2016, it was inhabited by over 3.5 thousand people (since 2002 the number of inhabitants decreased by over 10 percent). The unemployment rate is approximately 19%, compared to 30% in 2004 (at the beginning of the processes of change). 16% of inhabitants have a university degree, 1/3 - upper secondary education, 1/4 - vocational education and 1/4 - together elementary and lower secondary.

force behind the development of Bałtów village and commune would be tourism, and the underlying objective is the sustainable development of the commune.

It is worth noting that Bałtów commune is located in a region for which economic transformation was shock therapy. Since the 1970s, the largest production plant in the region was Ostrowiec Foundry, located in Ostrowiec Świętokrzyski, approximately 12 km from Bałtów, which employed more than 17 thousand people at the time. It is not an overstatement to say that in almost every household in Bałtów, there was at least one foundry employee. After restructuring of the plant in the early 1990s, certain divisions were separated and a new enterprise was established. Employment in the foundry was reduced dramatically to about 1.5 thousand. In 2012, the foundry had 1335 employees<sup>2</sup>. Thus, both in Ostrowiec Świętokrzyski and in the nearby Bałtów, the unemployment rate reached 20% or even 30% in the first years of the new millennium.

According to the interviews conducted, the local authorities believed at the time that further development should be aimed at mining, although no research has confirmed existence of any natural resources, or even heavy industry. Plans were made to construct cement works or a concrete batching plant in the former quarry in Bałtów.

In 2001, people related to the "Bałt" Association proposed an entirely new vision based on sustainable development. It was decided that unemployment, marginalization and discrimination should be eliminated through economic development, but not in fields that may threaten the natural environment. The focus was on activity that would contribute to environmental protection or the enhancement of its quality. The commune was to focus on tourism.

In 2002, "Bałt" Association organized the first tourist attraction, including raft rides on the Kamienna river that flows through Bałtów. The enterprise combined many features that became typical for further activities of Bałtów conglomeration. Those included activity on behalf of the local community, such as caring about the aesthetic characteristics, "discovering" the river for the inhabitants, and building links with the local area. Environmental activities focused on water treatment, addressing those inhabitants who discharged wastewater directly to the river to build septic tanks. Plans to counteract unemployment focused on several persons were employed in the raft ride organization. The profitability of the undertaking was to become self-sufficient, without needing constant financing from public funds. Finally, there was an effort to build a strong product to attract tourists.

A breakthrough event for the association and for the village was the discovery of dinosaur traces in Bałtów commune in 2003. Based on drawings from literature, a large model of the dinosaur was constructed and placed in front of the commune office. As it attracted much interest, more models were built. This is how the idea of the first Jurassic park in Poland was born in Bałtów.

The first JuraPark in Poland, established in 2004, became the most recognizable tourism product in Bałtów. It is an open-air museum occupying 3.5 hectares. The showpieces are realistically reconstructed life-sized models of dinosaurs. It was developed as a learning trail, where the visitors could get to know the world of dinosaurs according to the chronology of the Earth's history, and every showpiece was described in detail.

The establishment of a new, large-scale tourism product required professional management. Therefore, a new entity was separated from the "Bałt" Association called the "Delta" Association (known as Delta). Its main task was the development and management of the JuraPark. Delta gave employment to another group of people, many of whom were the unemployed of Bałtów commune, according to those interviewed.

At the same time, various forms of activity on behalf of the commune were separated. Social activity became the domain of "Bałt", while tasks associated with development of the new tourism product, creation of workplaces on a greater scale and educational activity in palaeontology were entrusted to Delta. The difference between the two entities was also noticeable in terms of language. Respondents from Delta spoke strictly in terms of economy, characterizing their activity or development plans, using such terms as "value chains", "competitiveness" and "investment". On the other hand, representatives of Bałt always referred to the social

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<sup>2</sup> [www.lista500.polityka.pl/companies/show/75](http://www.lista500.polityka.pl/companies/show/75) (access 5.02.2017).

dimension of their activity, speaking of "clusters", but always in the context of "social economy" and "counteracting social exclusion".

In the subsequent years, more tourist attractions were added, new initiatives and entities emerged, and the community joined local and supra-local projects and initiatives, such as Equal and Leader+ (Fig. 2). On the one hand, it was a way to provide stable employment for the inhabitants during the off-season, but mostly it was a way to attract tourists and develop the products offered.

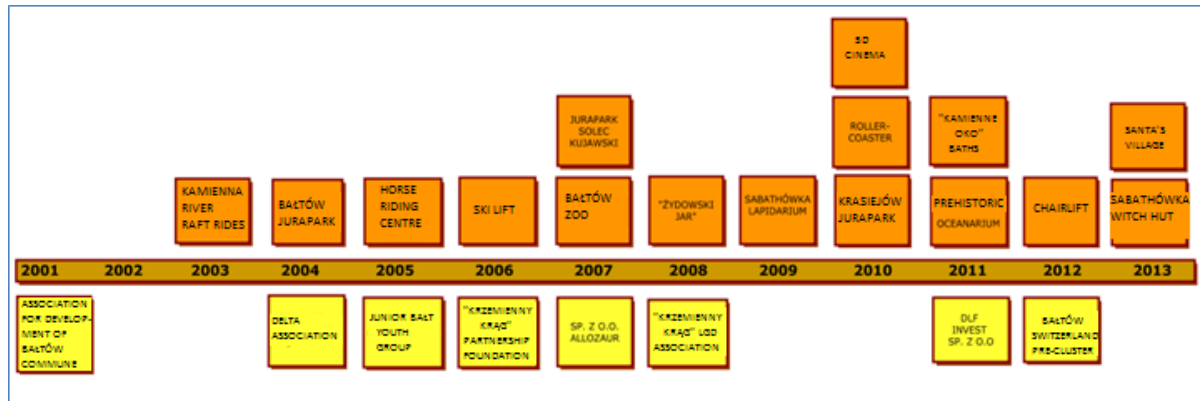


Fig. 2: The entities and tourist attractions in the Bałtów complex 2001 - 2013.

Source: Author's.

In 2013, there was a network of related entities of different legal status in Bałtów. A pre-cluster in tourism was established, which allowed for the construction of a second ski lift in Bałtów. It was an important experience, which was to be used for the development of the "Bałtów Switzerland" cluster.

Although research was concluded in 2013, a review of Web pages of Bałtów entities indicates that the initiative was carried out as planned. The cluster was established in 2014 and joined by 8 entities, while the Bałt Association became the coordinator and the core of the cluster. Its objective was defined as the "establishment and support of cooperative links in Bałtów commune through organization of a tourist cluster... The initiative to establish a cluster of social economy entities results from the need to join forces of the existing entities, and thus it is another stage in a natural process. It is a continuation of the idea of three-sector partnership, functioning in the commune, which emerged from the real need to strengthen cooperation and competitiveness of the local entities" [15].

The change that has taken place in Bałtów in recent years can be seen in statistical data, which shows a reduction in the unemployment rate by more than 10 percent in 2015 in comparison with 2004. Change is also visible at a glance. It becomes even more obvious, when we compare the image of Bałtów in 2003 and in 2013. In the past, Bałtów was a village in which public institutions like the commune office, schools, the local healthcare centre, and the post office were the major employers. There was only one store in the village. By 2013, apart from the Bałtów complex, many new workplaces linked to tourism emerged, such as shops, a pizzeria, a restaurant, an inn and a bank branch. Some initiatives that have emerged are not strictly associated with Bałtów complex, although they take advantage of the tourism infrastructure of the commune to some extent. Let us examine the Bałtów initiatives from the perspective of social innovation.

### Social innovation in the Bałtówian style

What has happened in the small rural commune of świętokrzyskie voivodship has led to change in various areas. There has mostly been a change in the quality of life and perspectives of the inhabitants. Thanks to the initiatives undertaken, unemployment was reduced, the space for local integration increased, the inhabitants have been empowered, they have got an example to follow, they started to care about their farmyards, and new economic and social entities emerged, bringing along new opportunities for development and making profits. Moreover, it should be underlined that activity of the Bałtów conglomeration entities, since the beginning, has been undertaken on behalf of the local inhabitants, in cooperation with them and in the context of the local needs. The respondents, including leaders, employees, the local authorities and the inhabitants, asked about what has been going on in Bałtów in the recent years. They obviously referred to the local aspects

of these activities: This is a primary impact, a social impact, associated with the origin, and connected personally, because this was very important, it is an activity, which has some social components – there is work, there are jobs, a beautiful landscape, but this is related to the specific nature [of the project]. There is no closed zone, no gate and cars in front of it, where you hardly know what is going on inside the factory – it is a tourist attraction, and it is open, like anywhere else in the world [the commune head].

A great part of activity of the Bałt Association is focused on supporting the local community, including the agritourism farms, youth and senior groups, folk groups, craftsmen and artists, sports clubs and NGOs. Since the beginning of their activity, the entities of the conglomeration have been cooperating with the local authorities. In 2007, inhabitants dismissed the commune head, and the new leader of the commune is a representative of the community linked to the local associations.

Many definitions of innovations focus on the fact that social innovations contribute to new solutions offered to social problems that are more productive, fair, effective or durable than the existing solutions, and the benefits are enjoyed by the society as a whole, not by individuals [16]. The activity of social economy entities in Bałtów fit into this definition. The change was based on shifting development of the commune from an unclear vision of development based on heavy industry and mining towards sustainable development. It started by showing the inhabitants that the Kamienna river, previously treated as a waste dump, can become an important natural, economic, and symbolic resource. Palaeontological discoveries in the commune led to opening of the JuraPark, which has been growing every year to become a large tourist complex and offers employment to the local inhabitants. The search for new attractions (particularly for the winter) was motivated by problems of seasonality, which resulted in the lack of stable earnings for employees. The "Allozaur" social enterprise, another entity of the conglomeration, was established, among other things, to support those inhabitants who were unable to find a place for themselves on the labour market. Finally, many inhabitants, thanks to support offered by Bałt, opened their own agritourism farms, thus finding a new source of earnings. Thanks to communication, trainings, and study visits they gained a wholly new perspective, focused on partnership, and they were able to leave behind the mode of reasoning, focused only on individual profit .

In some cases, we can even speak of social reintegration through work. The Bałtów conglomeration has given employment to socially excluded persons such as those addicted to alcohol: Personally, I know more than ten people, who were able to combat social exclusion, thanks to support of the local AA groups, direct cooperation with psychiatrists, treatment – now they serve as excellent role models for others, because they returned to work, to their social and family life, and that is a very positive phenomenon. This opportunity for getting employment, because the decision-makers know them personally, they know their families, and these people are given a chance – if there was no such opportunity, no job offers, they would have never come back from the dark side. Thanks to these investments, to this structure, there are many simple jobs to be done, which do not require special qualifications, and this allows these people to sort out their lives [Delta Association].

Also worth mentioning in the context of this analysis is the fact that social innovations go beyond the mode of action and thinking within sectors, they do not emerge in a single place and they may constitute a result of actions of several organizations or persons representing various sectors. They may emerge in between different sectors [17]. The social and economic initiatives of Bałtów are of such an inter-sector nature. They include entities focused on social objectives, as well as others, which operate in the context of the economy. Each of them emerged to achieve specific objectives, defined by the leaders of Bałtów. These were always aimed at adapting to the changes as much as possible, taking place in the environment.

The concept of cooperation of sectors has been present here since the beginning. As early as in 2003, various entities of opatowski, ostrowiecki and lipski districts communicated to integrate the dispersed activities of various institutions, organizations and enterprises for the development of the region, to attract investors, improve the standard of living of the local population and establish a joint programme for sustainable development as an Informal Partnership Group. As a result of various transformations, the Group was finally established as the "Krzemienny Krąg" Local Action Group Association in 2008 (hereafter referred to as the "LAG"). The strategic document developed, entitled the Local Development Strategy for Years 2009-2015, included the following definition of the LAG: "the way of solving economic, social and environmental problems of the region based on partnership, aimed at joining resources, competences and capabilities of the local self-government, economic and social entities to develop integrated and coordinated activities, aimed at effective implementation of the shared vision" [18].

Further activities of entities of the Bałtów conglomeration, first as a pre-cluster of social economy, then as a cluster, are also an implementation of the broad, inter-sector formula of activity based a chain of values.

Has Bałtów experienced popularization of social innovations? In other words, has the process of diffusion of innovations occurred? According to Rogers, it is a process in time, in which innovation is transferred through specific communication channels by members of a social system [19]. Diffusion of innovations is not a single decision, but a complex, gradual social process, in which the social environment influences the speed of dispersion of innovation from the stage of persuasion, through decision and implementation, until confirmation [20]. Research conducted by Rogers shows that the validity of the innovative idea may be of secondary importance if it clashes with the functioning social norms and behaviours. At the same time, the decision to accept innovation is burdened with risk, and individuals tend to rely upon behaviours of their close friends and relatives.

Giza-Poleszczuk and Włoch [21] have noticed that to speak of acceptance of innovation, the existing practices must change at the level of individual behaviours and a broader system of activities: "It can, in fact, be stated that if a novelty changes nothing in the practices of a given group, it is not an innovation, but only a substitute". In fact, it is virtually impossible to enforce innovation, as it is associated with high costs. The inhabitants of Bałtów commune initially did not believe that the undertaking could succeed, and they distrusted the intentions of its originators. However, when early changes started to emerge in the community along with new entities and attractions of the Bałtów conglomeration, their scepticism gradually turned into interest and hope: The first year was full of doubts –<hey, they came up with dragons, who's going to come here to see the dragons?> And then they saw the coaches, and more and more people were getting jobs, and this changed... At first, there was discouragement, but only at first: they would take everything, monopolize the market, and this will be the end of it. But then they saw it was not just them earning money, but everyone who worked there [the inhabitants].

A change in the practices of inhabitants of Bałtów is surely associated with improvement in their living conditions, associated with stable employment opportunities, the emergence of a large market for the sale of local products of entrepreneurs and farmers. One example is the purchase of hay as fodder for animals from the "Bałtów Zoological Garden". On the other hand, we are dealing here with modelling of behaviours, promotion of sustainable development, caring for the environment and the landscape. Activity of entities of the Bałtów conglomeration has contributed to building and strengthening of identity of the inhabitants and their pride of belonging to the region through the following activities:

- revitalisation of space, and renovation of historic buildings of the commune such as the old mill, which now serves as a museum and exhibition, as well as a souvenir shop with crafts of the local artists,
- activation of the youth and support for civic education through the activity of Junior Bałt,
- stimulation of entrepreneurship in the commune by supporting the agritourism farms,
- referring to history and tradition of the region through the establishment of the witch hut or the JuraPark as a result of palaeontological discoveries in Bałtów.

## Conclusions

Analysis conducted in this article concludes that it is possible to refer to social innovation of Bałtów initiatives and state that they have been implemented and confirmed at the institutional and individual level. To a great extent, this has been possible thanks to a successful combination of business and social objectives, which is the core of the social economy. It is a result of good relations with the local and the broader social environment, rooted in the local community, illustrated how the concept fit into the environment and capitalized the local resources. More broadly, the analysis illustrates how networking helped residents take advantage of resources made available thanks to participation in various partnerships. Another important factor was, undoubtedly, the flexibility of action, including the ability to adapt activities to financial resources, and leadership, understood as the ability to last over a long period of time, being involved in the activity of the enterprise, and having a certain amount of social authority.

It remains an open question whether Bałtów has become an example for other local communities and whether the innovation diffusion process may go beyond the boundaries of the commune. Although the research project did not include this question, it is nevertheless known that the activities in this commune have been

greatly popularized. Bałtów has been mentioned in various guidelines of best practices in social economy during conferences and seminars. On the other hand, the activities of Bałt Association have included the organization of study visits for other organizations to share knowledge and experience in the implementation of local changes, and to analyse the factors of success. Bałtów has been visited by journalists and researchers. Thus, information has been made available to those interested. Whether such changes have been implemented elsewhere is another question. Factors that may hinder the diffusion of innovations include improper communication, addressed to the wrong recipients, as well as diffusion taking place too early and in a manner that is not adapted to the developmental capabilities of the society [22]. Another specifically Polish barrier is the standard of distrust [20]. This would be activated if there are no proper measures in the environment to protect the local community against the effects of a reduced sense of responsibility for mutual assistance, the use of resources belonging to other persons, and having less social control.

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## **LEAVING THE IVORY TOWER THROUGH SCIENTIFIC INNOVATION CO-OPERATIVE RESEARCH – A SOCIAL EXPERIMENT IN RESEARCH ON ALTERNATIVE AGRO-FOOD NETWORKS**

### **Abstract**

The paper presents a participatory pattern of conducting research for social science. A few projects based on the idea of 'co-operative research' have been funded within the 7<sup>th</sup> EU Framework Programme. Among them was the project "Facilitating Alternative Agro-Food Networks – Stakeholder Perspective on Research Needs" (FAAN). One of its goals was to test the potential of the co-operative approach in social research practice. This paper aims to present and discuss the experiences from the project to reflect upon the usefulness of co-operative research as a scientific innovation and a new research paradigm, as well as to propose its reframing based on the results of the project. The article ends with practical recommendations concerning management or research projects in a co-operative manner, stressing the need of competencies for team leaders in micro-management of heterogeneous research teams.

**Key words:** co-operative research, scientific innovation, participation, integration of knowledge, science in society, science governance

### **Introduction**

The idea of co-operative research (hence CR) is rooted in a demand for democratizing science governance and related policy decisions to become more accountable for the values and interests that underpin both the governance of science and the role of research in the context of "evidence based" policy making. This implies recognising the framing of research (policies) and scientific evidence and underlying assumptions, purposes and inherent values, as well as the relevance of different forms of knowledge. We understand the concept of CR as it has been described within a report resulting from an expert workshop "From science and society to science in society: towards a framework for 'co-operative research'" [1] organised by the European Commission. Co-operative research is described there as "a new form of research process, which involves both researchers and non-researchers in a close co-operative engagement" [1: 9]. In contrast to many other engagement mechanisms, CR requires constant attention to trans-disciplinary engagement with stakeholders and public constituencies to explain the driving aims and purposes, the alternative orientations, and the wider social and environmental implications of research and innovation. Thus, this concept goes beyond involving multi-disciplinary or inter-disciplinary teams from specialist institutions and transgresses academic boundaries.

In relation to social sciences, co-operative research breaks many entrenched research habits. First, it opens social research areas typically perceived as reserved for natural sciences. It regards mainly areas of innovative, highly complex technologies, such as biotechnology or use of nanomaterials. Primarily because of social controversies related to those technologies, their course of development has become in the last years more inclusive for representatives of social sciences. Therefore, CR does not only introduce new types of knowledge

into social sciences, but also requires its integration. Second, on the methodological level, it introduces new ways of research process management; together with non-academic partners, new research methods, tools, concepts and notions are coming into social research practice. This requires an epistemology, methodology and organization that goes beyond disciplinary research, opens the research process, and integrates knowledge and values from outside the realm of science.

Such a new form of collaboration between science and society requires new standards and patterns of research work. Therefore, many questions arise related to the practical aspects of “doing CR”: How does it work in practice (if at all)? What are the advantages and disadvantages of using CR in social research? Which challenges and opportunities does it bring about? What are the potentials and limitations for implementing such a co-operative approach in methodological framework? We will attempt to answer those questions by pursuing the following goals in this paper:

- To describe the methodological framework of the project design, which is based on the idea of co-operative research. The elaborated framework mainly applies to the meta-level of the research process, which relates to issues such as agenda setting, defining the goals and values, the work plan, communication between partners, social learning and decision-making processes.
- To reflect upon the experiences with conducting co-operative research from a point of view of research teamwork and day-to-day cooperation between academics and civil society representatives.

The research results presented in the paper are directly linked to the international research project “Facilitating Alternative Agro-Food Networks – Stakeholder perspective on Research Needs” (FAAN) funded within the 7<sup>th</sup> EU Framework Programme. The consortium consisted of representatives of 5 research institutions and 5 non-governmental organisations who jointly participated in setting up the project concept, the implementation of research activities and dissemination of the results. The project involved researchers representing a variety of disciplines, such as sociology, economics, political science and bioengineering. However, most of them came from social sciences. Representatives of the civil society came from organisations committed to the development of rural areas, local development, eco-development and sustainable food supply. The research lasted for 26 months and involved 5 EU member countries, including Austria, France, the UK, Poland and Hungary. Within the FAAN project, the focus was on civil society organizations (CSOs) acknowledging their growing role in science-society-interaction<sup>1</sup>.

The paper consists of two parts. The first one presents the idea of co-operative research with its basic assumptions and main hallmarks. In the second part, experiences from the FAAN project are described and analysed. Three pillars of CR have been taken as reference points for this analysis: integration of different kinds of knowledge, upstream engagement and relation to the policy making process.

### **Co-operative research as a response to main problems of current science policy**

CR – in a very broad sense – can be seen as a response to the crisis in science governance. This crisis has been described either as a crisis of trust in science [see 2, 3, 4], or as a result of new modes of science and knowledge production [5, 6, 7], such as post-normal science [8], mode 2 knowledge production [9] and transdisciplinarity [10, 11]. The main problem of science governance tackled by CR is the lack of effective possibilities to influence the direction of science development which would more widely reflect needs, interests, values and priorities of possibly many different social groups. In other words, CR tries to overcome the current situation in which agenda-setting for publicly funded research is often driven by interests and market mechanisms which do not always meet the needs of civil society. In this respect, CR is about “bringing research closer to society”, and ensuring its societal relevance.

Therefore, CR can also be perceived as a response to debates about the lack of democratic mechanisms in regard to the governance and political legitimacy of science and technology and related agenda setting.

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<sup>1</sup> Institutions which participated in the project were Inter-University Research Centre for Technology, Work and Culture (AT); Nicolaus Copernicus University (PL); Agrocampus Rennes (FR); St. Istvan University (HU); The Open University (UK); Via Campesina (AT); CIVAM Bretagne (FR); Polish Rural Forum (PL); Genewatch (UK); Védégylet (HU). Reports from the project can be downloaded from the project website [www.faanweb.eu](http://www.faanweb.eu)

Although science and innovation policies are increasingly focusing on research and innovation that should be accountable to society and help to tackle society's great challenges such as food, climate change, health, and aging, there is concern that the European research agenda is being captured by commercial interests. For instance, within the recently launched Horizon 2020 research programme [12], research and innovation policies are often formulated against a "competitiveness" frame [13]. Horizon 2020 represents the financial instrument implementing the Innovation Union as a Europe 2020 flagship initiative, which aims at "developing an economy based on knowledge and innovation" [14]. In this context, research is essentially expected to contribute to economic growth and greater competitiveness, and it is considered as innovative if it takes "great ideas from the lab to the market" [15]. It leads to marginalization of both European society and social science from research frames. Balance in addressing societal needs beyond economic interests might be redressed by ensuring that the public and other key stakeholders than industry are given a stronger say in defining research and knowledge needs. This situation is connected again with shortcomings in existing participatory (or "democratic", "deliberative") approaches in science governance. Participation of the public in decision making about scientific innovations has turned out to be in many cases ineffective and/or used mainly to legitimize political decisions which have already been made [16]. However, CR does not intend to drop out the participatory approach as such; instead of doing that, it offers a significant reformulation of public and stakeholder participation in science governance, which aims at improving previous approaches.

Taking into account these features of CR one can say that it offers a promising approach to facilitate research on issues which [1] have a high degree of societal relevance and (2) have been up to now either neglected in the mainstream research or 'monopolized' and studied only in one dominating way.

Co-operative research positions have of vast tradition of participatory research ("participatory research", "action research", "transdisciplinary research", etc.). The issue of public participation have been one of growing interest to academics, practitioners, regulators and governments for many years. Fischer [17] describes public participation as "deliberation on the pressing issue of concern to those affected by the decisions at issue". For Rowe & Frewer [18], public participation is "the practice of consulting and involving members of the public in the agenda-setting, decision-making, and policy forming activities of organizations and institutions responsible for policy development."

In response to the lack of trust and confidence in science and policy, or as Felt & Wynne [4] called it, "public unease with science", new mechanisms or interfaces between "science and society" and "science and policy" are expected to be developed to make innovations and knowledge production more socially robust, to enhance the "public value" of innovation [3]. First, the concept must be abandoned that a lack of trust towards science and the rejection of certain techno-scientific developments can be explained by a lack of information in society. Informing the public is not enough, because people experience science through social relationships [16]. People do not simply need information, but a more open kind of dialogue, instead of one-way communication, which must be established by "moving outside the niche ghetto of science and society research to incorporate elements of public engagement as essential features in the funding cycle for conventional scientific and technological development activities" [1]. Second, practitioners – or the "users" of scientific innovations – hold valuable experiences that should be taken into account in addition to the "experts" [5].

With the introduction of "Responsible Research and Innovation" (RRI) as a cross-cutting issue in Horizon 2020 [15], the engagement of non-research actors in research and innovation activities might gain even more relevance. As outlined by Von Schomberg [19], RRI is "a transparent, interactive process by which societal actors and innovators become mutually responsive to each other with a view to the (ethical) acceptability, sustainability and societal desirability of the innovation process and its marketable products to allow a proper embedding of scientific and technological advances in our society". Furthermore, Owen et al. [20] highlights deliberation as an important dimension contributing to the substantive agenda in future programs of responsible innovation.

### **Three pillars of co-operative research in FAAN**

The FAAN project was built on three main features of CR:

- Integration of different kinds of knowledge.
- Upstream engagement.
- Reference to the policy making process.

The first point is related to the way knowledge is being treated in Co-operative research. First, it is not seen as a static commodity, which is “out there”, “as intrinsic property of the date, separate and independent of the knower and knowing process” [21] and can be transferred from one person to another (or from nature to scientists), like it is conceptualized in some forms of participatory research, where lay people are confronted with knowledge presented by experts. Instead, the concept of CR [1] defines knowledge as a relational actor-oriented process, and it stresses the process of social shaping of knowledge. However, this understanding of knowledge production generates certain problems in collaborative research processes. As Natasha S. Mauthner and Andrea Doucet notice, “If knowledge is produced through located, embodied and specific subjectivities, contexts and relations, ‘putting knowledge together’ entails reflexive research practices that recognize and articulate such contexts and specificities, and use them as sources of knowledge in their own right.” [21]

By talking about “putting knowledge together”, Mauthner and Doucet refer to the problem of integration of different kinds of knowledge produced by participating partners. Although their work on team-based research practices is not referring to teams with academics and non-academics, but to groups of researchers only, their examinations are in some points also relevant for trans-disciplinary research projects such as FAAN. Trying to find an answer to the question “how to translate theoretical postulates of collaborative research into research practice”, they point out the following problem: “Team research relies on a division of labour that creates divisions and hierarchies of knowledge, particularly between researchers who gather embodied and contextual knowledge ‘in the field’ and those who produce textual knowledge ‘in the office’” [21]. Existing research practices are reflected – in their opinion – in “hierarchies of knowledge”, in which textual knowledge is regarded as more objective and accorded higher status than embodied and contextual knowledge, which is seen as more subjective. Fieldwork tends to be viewed as a technical activity that can be done by anyone, rather than an intellectual process in which meaning and knowledge are being shaped and created by subjective researchers.

The understanding of knowledge production within co-operative research, which has been taken from the tradition of collaborative research, brings about similar challenges for the constitution of the research process to that described by Mauthner and Doucet. It should be stressed that such an approach does not exclude scientific knowledge from this understanding. The way scientific knowledge is framed, which questions it answers, which values it fulfils, and whose interests it serves is shaped in a process of social negotiations and public engagement with stakeholders and representatives of civil society. It does not aim at undermining the value of scientific knowledge. As Andrew Stirling explicitly says, “The point is not therefore that interested stakeholders or randomly recruited members of the public can be better experts than the experts. The issue is rather one of acknowledging the crucial role played by cultural values, sectional interests and political and economic power in the shaping of knowledge” [1].

The idea of co-operative research itself originates from the field of “science governance” within Science and Technology Studies [22]. As such, it aims at integrating scientific knowledge (presented by experts) with other types of knowledge. This integration in the process of knowledge production is directed towards establishing reliable knowledge consisted of elements commonly perceived as scientific and non-scientific as well.

As a rather broad and general idea, CR can refer to both natural and social sciences. In the discussion within the “science governance” field of study, one can notice a certain tendency to concentrate more on natural, than on social sciences. However, in the FAAN project we were attempting to adapt CR to the social sciences in the area of agricultural food production.

Integration of knowledge is a crucial element of Co-operative Research. What distinguishes CR from many other participatory approaches is the fact that CR does not aim at simply producing “pure” scientific knowledge with the support of non-scientists. Such an approach would assume a preference of scientific knowledge over other kinds of knowledge held by non-experts. In the case of co-operative research, the goal is to produce knowledge that goes beyond the narrow term of “scientific” and consists of different kinds of knowledge represented by different actors participating in the CR process. Within FAAN, we were producing socio-economic-political knowledge, which is generated in broad socio-economic and political systems by integrating different kinds of knowledge. Therefore, when talking about co-operative research in the FAAN project, we should always keep at the back of our mind the broad framework of “knowledge production”. Framing an issue in a participatory manner is based upon the assumption of equal status of different kinds of knowledge, which must be considered in the research design. It is no more the scientific knowledge alone, which plays the leading

role and prevails upon other kinds of knowledge, but also such kinds of knowledge as tacit, local, common-sense and non-expert knowledge becomes a part of the framework.

Upstream (or “bottom-up”) engagement, another core aspect of CR, refers directly to the issue of framing. It emphasises the need to involve the public at the very beginning of a research process and let it co-shape the framework of the research process and decisions over “framing” a policy issue when it is still open to be influenced [23]. Upstream engagement designs the research according to the needs and values of wider groups of society to set specific goals and prepare an adequate base for the research, reflecting commonly shared assumptions, understandings and moral values. Upstream engagement is opposed to the “top-down” approach, where the public plays only a passive role – it is presented with readymade solutions at the end of a research or policy process and can only give feedback by expressing its opinions on ready-made facts. In such situations, the issue at stake gets a very narrow frame by excluding some options at the very beginning. Thus, the public can decide “yes” or “no” or “what to do”, but not about “how to do it” or alternative choices. This brings us to the final point of CR, which concerns decision making on policy relevant issues.

The reference to the policy making process is in accordance with the goal of CR to bring research closer to society and connect it more with stakeholder needs. This can be accomplished only when the two previously described conditions – integration of different kinds of knowledge and upstream engagement – are fulfilled. To describe the situation, Stirling uses the opposition of “closing down” versus “opening up” the debate by public engagement [1]. The top-down approach is aimed at “closing down” a debate by letting the public decide what to do and choosing from proposed solutions. CR starts from the other end and involves the public at the earliest stages to “open up” a policy process and shape it within a desired framework. This characterises the difference between some other participatory approaches and CR: while the former prioritizes the process of informing decision makers by the public, the latter emphasizes the shaping and framing of decisions to be taken. In other words, CR is more about “decision making” than “decision taking”.

#### **Civil Society Organisations (CSOs) as the voice of the public?**

Up to now, we have been referring to the “involvement of civil society” or “the role of the public” in research processes. Now we would like to underline the important role of **Civil Society Organisations (CSOs)**, which may be seen as a kind of connector between the ‘general public’ or particular groups of the public and decision makers. As the authors of the report “Governance of the European Research Area: The Role of Civil Society” mention, the term CSOs refers to the following kinds of organisations [24]: “The labour-market players (trade unions and employers federations’, often referred to as the “social partners”; organisations representing social and economic players , which are not social partners in the strict sense of the term; non-governmental organisations which bring people together in a common cause, such as environmental organisations, human rights organisations, consumer associations, charitable organisations, educational and training organisations; community-based organisations , i.e. organisations set up within society at grassroots level, which pursue member-oriented objectives: youth organisations, family associations and all organisations through which citizens participate in local and municipal life; and religious communities.” Over the last 20 years, an increasing number of CSOs have diversified from service provision into policy advocacy. They are being credited as having considerable impacts on global processes ranging from economic development to democracy. CSOs play increasingly an important role in science-society-interactions by actively addressing issues of public interest. Moreover, they mediate between the research community and ‘normal citizens’. This mediator-role might be particularly important in democratising science governance. CSOs often have the inside knowledge of societal needs, and they have the capacity to generate questions for agenda setting. Still, until recently CSOs have rarely been involved in research policy issues and research activities. The involvement of CSOs mainly aims to facilitate implementation of results from research or political agendas. There are very few research activities, taking a bottom-up approach by involving CSOs at a very early stage in research and related policies, such as in agenda setting.

#### **Co-operative research in practice – what can we learn from the FAAN project**

In the preparation for empirical research and CR methodology, the FAAN project was divided into several modules by content and technique, which were supposed to help achieve the analytical objectives and support the communication process within the consortium. Within the content tasks, 10 case studies describing specific Alternative Agro-Food Networks (hence AAFN) were prepared. The case studies were supplemented with research into the public policies of the AAFNs development.

The implementation of the FAAN research project was supposed to enable the achievement of the following objectives:

- To test the co-operative research methodology in the practice of a large international research project.
- To identify the specific nature and the stage of development of the alternative food production, distribution and consumption networks in selected countries.
- To analyse the broad policy of support for the socialized forms of agriculture and its position in development programmes for rural areas at the European, country and regional levels.
- To create potential scenarios of local food systems development in areas covered by the study.

The specific nature of alternative forms of agricultural organisation and the practical orientation of the research have determined that the project, used the co-operative research methodology. As Krzysztof Gorlach notes, contemporary studies of rural issues encourage the use of instruments which will promote the fusion of local, tacit, managerial and scientific knowledge. "First, scientific (new environmental knowledge in this case) may be identified as a tool revalorising traditional, local knowledge. Thanks to that, traditional knowledge has become a part of current reality. Therefore, in fact, we have to talk about a kind of a hybrid structure in which important elements of traditional and scientific knowledge co-exist and interact with each other." [25]

In FAAN, the major assumption was to connect the representatives of research institutions with the representatives of civil society organisations who engaged in shaping changes in rural areas. Such a structure and formula of the research team gain specific significance in the case of the alternative networks of food production, distribution and consumption. It allows one to include in the research the point of view and objectives of individuals and institutions who directly engage in supporting local systems of agricultural production in rural areas. It leads far beyond technological change by treating food as a complicated societal issue.

#### **Transdisciplinary process design**

The FAAN cooperation was characterised by a strong bottom-up approach of already setting up partnerships in the incipient phase of developing the project idea and writing the proposal. In addition, we ascribed a crucial importance to a step by step process design to be developed and adjusted according to the results from process reflections.

In the FAAN project the process design has been elaborated based on concepts for the implementation of transdisciplinary research methods [26, 27], namely along alternating phases of "integration" and "differentiation" steps. Both phases were characterised by a process of interaction between project team members and further participants that allowed them to express their individual interests and viewpoints and knowledge to be exchanged, discussed and shared. While differentiation steps were supposed to make differences explicit, integration steps served to identify common grounds and to implement identified differences in a way which created the basis for agreement on the next step in the project. The core aim of all efforts in designing this process was to provide conditions which should allow for a meaningful integrated knowledge production.

#### **Integration of different kinds of knowledge**

The application of mechanisms allowing participants to merge different types of knowledge using a project as a platform was to be ensured in FAAN by means of:

- Mixed composition of the research consortium in which the representatives of academic institutions and NGOs engaged in the field of alternative forms of agriculture cooperated in designing the research on equal terms.
- Including in the project the participatory research methods and techniques to reach individuals and institutions operating at different levels. The research involved qualitative case studies in local communities, scenario-based workshops at the regional and national levels, and finally, a European conference and workshop which took place at the DG Science office in Brussels. The varied levels and partially active role of the respondents were supposed to: enhance the accuracy of the research, promote the engagement of actors representing diverse systems of knowledge. The structure of the

research instruments (especially the workshops) allowed for the construction of a two-way communication between the researchers and those investigated in the study.

The point in integration is to try to create a common understanding, seek common objectives, and work on the commonality of the identified differences. It is worth noting that in the practice of the FAAN project, the transition between these stages was not linear, and the defining and identifying meaning occurred throughout the whole period of the project implementation. The basic dividing line which emerged during the project execution was connected with the academic or CSO-related origin of the individual and their motivations to engage in the project. The partners' motivations may be generally divided according to the initial declarations on the objectives of participating in the project. As it had been assumed, initially, there were two prevailing types of motivations:

- Oriented towards resolving problems in the development of alternative food networks (practical orientation). In this case, strategies aimed at direct action dominated.
- Academic orientation towards understanding the phenomenon of social consequences of the development of new forms of agriculture, and connected with the attempt at questioning the dominant systems of knowledge on agriculture development and consumption (academic orientation).

However, such compositions of the research team led to a rather unique estimation of FAAN project aspects. The key factors pointed out by the partners pertaining to interpersonal relations, the secondary ones focusing on academic and practical effects of the project, and those treated as tertiary and valued the lowest - the backroom of science, intuitively reflects the specific nature of the co-operative research. It is aimed at the process of co-construction of knowledge, and the consortium is here a ground for forming relations and clashing opinions. Actually, this is quite an obvious effect – since the very beginning of this path of practising science, it was important to seek mediating discourse [28]. Within the consortium, the partners' initial objectives, research and practical questions were transformed in the process of discussing. The FAAN example shows that this way of conducting research causes that it is somehow being created again throughout the period of the project execution – and the results of the process may be surprising for the participants themselves. Paradoxically, this process is so complex that at a point it may overshadow the tangible results of the project. The aspects of the project that achieved the lowest values were those connected with methodology and, paradoxically, the role of science. One might argue that this is a weakness, but it is a specific characteristic of this mode of practising science. At the same time, however, it indicates the unique conditioning of the research process; it is the consortium composition, the skills at managing interpersonal relations and competences in solving conflicts that the actual effectiveness of the project consists in. When joining a team, every partner was primarily focused on solving a particular problem, either an academic or a practical one. Nevertheless, during the activities it turned out that this aspect became strictly dependent on the nature of relations between the actors: “So, this is the second thing I want to underline and this combination of CSO and academic partners, at least in our [...] context has been very, very useful and it was something that we didn't really expect because, I think the main lesson for me, at least, it was this combination of university and activist context [...] and this is if I think about the differences, for me a very important aspect.” (Academic institution representative).

In general, the composition of partners in the research team was a facilitating rather than hindering factor of knowledge integration. However, the evaluation pointed out some elements which disturbed this process. During the project differences emerged in terminology, such as a different understanding of the notion of alternativeness depending on the country and the represented organisation. An equally substantive division pertained to the different cultural and institutional contexts. During the project implementation, there were claims for commonality of language and terminology used by different teams. The partners had to accept the variety of institutional models in which other operated. In the consortium, the cooperating individuals from countries of highly dissimilar experiences in both the functioning of scientific institutions, and the model of NGO activity, which demanded great deal of empathy and understanding of administrative barriers that emerged in the course of the research. The processes of integrating different types of knowledge were also hampered by extremely different ways of legitimising data sources and evidence. The academics based their findings on literature surveys and codified techniques of data collecting, while the representatives of the 3<sup>rd</sup> sector used more grey literature, as well as tacit and local knowledge. Connecting the various systems into a coherent whole proved to be a highly complicated task. “It was really an important aspect to pay attention to equally considering the input of the CSOs and academic partners. [...] At the beginning of the project it was not



so clear why and how to consider and balance these inputs – shall we trust more the literature, how much shall we base the research design on the experience of the CSOs? I was not completely sure about how reliable they might be [...] maybe they were just interested in bringing their lobbying work forward [...] In the run of the project we realised that indeed such a combination of academic researchers and practitioners is very productive. In the end of the project people were convinced that specific contributions of each part were valuable [...]” (Academic institution representative).

The idea of considering various types of knowledge on equal terms in the process of research design, execution and implementation poses specific challenges for the team who design and implement the research. The FAAN project demonstrated that the key element is the consortium's flexibility, willingness to modify the research objectives, instruments, perception of the research and its results. This requires more unusual methods of research design, which brings us to the next aspect of co-operative research, namely the upstream engagement.

### **Upstream engagement**

According to the basic principles of CR, both academics and civil society organization members had to jointly construct frames of the proposed research. Demand for bottom-up approach led team members in front of challenges unusual for traditional way of conducting science.

More time was spent than traditionally on integrating the team, internal communication, and coordination of activities. Apparently controversially – a variety of financial, organisational and time-related resources were devoted for workshops on clear and precise articulation of differences, the issues of controversy and joint attempts to work on them. The instruments used within the FAAN project and promoting joint cooperation of members were [29: 31, modified]:

- Communication measures focused on improving the processes of information exchange within the research consortium. In the FAAN project, these were based on direct contact and workshops on the one hand, and cyber-instruments on the other, including primarily discussion groups, intensive use of communicators and the so-called 'FAAN wiki' – an adaptation of the Wikipedia mechanisms.
- Self-reflection and understanding of the need for compromise in connecting personal experiences into one whole. In this case, this process was most of all individual and required that each consortium participant alone reflected on their motivations and role in the project.
- Negotiations and coordination of the decision-making process. A separate function of 'co-operative research guardian' was distinguished – a person whose responsibility was to control the process of decision making and power distribution. Also, an important role was played by the personnel engaged on the side of the leader – they ensured the common nature of the activities.

In the FAAN project, the animation of upstream engagement processes was two-way – on the one hand, the mechanisms and communication tools were formally institutionalised, but on the other, the informal contacts between the researchers were highly important. In practice, it turned out that the latter channel is more important for the proper process of the co-operative research. Despite the coordinators' activity, the formalised channels of communication, Internet fora, or special websites the activity of consortium members failed to increase. Much more important were meetings, workshops and activities initiated bottom-up by the partners. This is the core of the issue with CR – they have a deeper sense when the motivations and expectations of people participating in the research allow for such a cooperation. The FAAN project experience proves that in this mode of conducting research, a much more important role than traditionally was played by the soft factors connected with participants' personality and behaviours. This also requires at least partial commonality of the objectives of the research team who join the project. In the FAAN project, this common element was the willingness to analyse and strengthen the new social forms of agriculture organisation; this mutuality of rudimentary interests promoted the later solving of conflicts connected with dissimilar systems of knowledge represented by the experts.

In practice, the selected model of research use of different tactics of micro-management within particular research teams and content modules, as well as other structures of the consortium itself. A less important role was assigned to hierarchical relations, typical of the academic entities. The researchers were made to redefine the ways of decision making. Each element of the project from the application, research concept and

instruments, to the ways had to be discussed with the consortium members. Additionally, the content modules were constructed so that they forced the mutual cooperation of scientists and CSOs activists.

It is necessary to discuss two additional, specific aspects of the co-operative research which emerged as significant in the project. The first is time allocation. The integration of various knowledge systems, precise definitions of differences and their commonality require vast amounts of time spent on achieving consensus. Assuming the scientific orientation, it must be stated that technically, in the FAAN project, the research itself could have been conducted faster – this was actually the reason for tensions within the group. Close cooperation of partners coming from various sectors allowed for diversifying the perception of the research subject in the FAAN project; however, one needs to bear in mind that in designing such types of research, the participants have to be given sufficient time for discussion, conflict and development of methods for solving it. The FAAN project was characterised by the non-linear nature of the research process. In contrast to the classic model, this required a larger amount of resources and time for the agreement on common position. The second element whose meaning should not be underestimated is language and the research team's communicative abilities. The question is not simply the command of the language. The research does require highly precise definitions, however, additionally, the mechanisms of integration make continuous reorientation of the consortium members a necessity. This is impossible if the linguistic competences of the team are limited.

It is also necessary to pay attention to the role and significance of trust in the FAAN project. Strong emphasis on the relationship and interlinking of the project effectiveness with quality of teamwork causes that the significance of this category substantially exceeds the standards of work in a classic project where the relations between the partners may be institutionalised and based on existing modes of cooperation. “In this project we established a close and a really productive co-operation, [...] at a certain point this became a friendship, and this made it so easy to understand each other and work together, yes, this was very productive [...] we will carry on our cooperation [...] for sure we will do this” (Academic institution representative).

In the case of the FAAN research, there was no such possibility – good, personal relations within the consortium were indispensable. The role of the coordinating team was also of high significance. Apart from controlling the performance, schedules and expenditure, it had to focus on the nature of bonds, quality of connections and communication within the consortium as well. In practice, such balancing of the interests of partners proved to be rather difficult. The research evaluation showed the redirecting of focus towards practical objectives backed up by the civil society organizations. The representatives of scientific entities stressed that a great variety of data collected during the study might have been used more thoroughly. “Actually I think it was because of the nature of the project like maybe because it was more like looking at the CSO's interests as well in this way there wasn't kind of academic elaboration in the way that it might be if it were an academic centered project [...] But from this aspect it was quite helpful as well because then there could be plenty of academic analysis which could be generated [...]” (CSO representative) This issue reflects a certain dilemma of the co-operative research. In a sense, they are always based on a compromise. Despite the research question, or science as a matter of priority, it is still necessary to reconcile its objectives with the practical orientation of some partners.

### **References to policy making process**

This leads us to the third pillar of co-operative research, which is the policy making process. It is assumed that this notion pertains to the specific role played by the participatory model of practicing science. The objective of projects based on CR is not to provide a ready-made answer, or to close the debate, but rather to open it by letting new groups of citizens produce knowledge. It has to be stressed that contrary to knowledge integration and upstream engagement, this point refers to the modes of research team management to the smallest extent, and to the biggest one to the applied research techniques and ways of results dissemination. Coming back to the FAAN project, linking with the policy making process was supposed to occur by means of the specific construction of the empirical part of the study. The classic techniques of data collection, such as desk research, in-depth interviews, and focus group interviews, were complemented with workshop techniques based on a deeper and two-direction engagement of the study subjects and a two-way mechanism of results popularization.

The first of the elements opening the debate were scenario-analysis workshops. These were to engage key stakeholders, such as farmers, food processors, consumers, and officials in the debate on the future of the

alternative model of distribution and, at the same time, to introduce their expertise and their point of view into the research project. “Could a focus group bring additional value? We think that it cannot bring useful additional information [...] we better use the resources for a second scenario analysis workshop [...] this is a better method to reveal driving and hindering factors [...]”. (Academic institution representative)

Meetings at the country level were complemented with one European workshop within which key national and EU experts were to create models of new forms of agriculture development. In the evaluation, the workshops were indicated as one of the most important elements, a more valuable one than the classic techniques based on one-way information transmission. What was underlined was how strongly non-research actors, which in the classical mode of science had been rather passive respondents, got involved in them, as well as the density, the detailed character of workshop data description, which is, after all, one of the requirements of a rich, deep qualitative analysis. On the other hand, the number of meetings held was a major limitation. The teams organized one or two workshops, which drastically limited the actual effectiveness of this technique.

The second element, which is more difficult to assess, and which may influence the opening of the policy debate process, was connected with the way of disseminating the project results. There were two modes of communicating the project results. The first was the classic one that consisted of producing scientific materials such as conference papers, publications in ranked scientific journals, and scientific monographs. The second mode, based primarily on the CSO members – was aimed at popularizing the results among the practitioners concerned with the domain of food, and at engaging them in the process of developing alternative forms of food production or changing legal regulations applicable in certain countries. To achieve this, non-governmental organizations networks of contacts, workshops techniques, materials distributed by organizations participating in the project, discussion fora were used. Therefore, not only was there space for a wider reception of the study results by practitioners provided, but also the heat of the debate on the subject matter studied by the consortium was raised. We believe that, apart from the manner of managing and decision making, it was the mode of results popularization that was one of the most significant innovations within the FAAN project. Obviously, it has to be stressed that such a two-way direction of results disseminating also has some disadvantages, which were revealed in the course of the project execution. Basically, it means that the researchers' limited amounts of time and resources have to be devoted for scholarly publications and work with experts from outside the academy. In practice, this means a smaller number of hard points, publications or conference speeches which a scientist may be able to produce. Nevertheless, if we assume the deliberative role of science and the potential in opening to the society, also after the project completion, then the limitations, however adverse for a scientific career within the current academic system they may be, seem to be justified.

### **Conclusions: toolkit for co-operative researchers**

The added value of the co-operative research in the FAAN project must be highlighted at the beginning. On the one hand, it enabled the researchers to go beyond the typical, analytical ways of perceiving the social aspects of food production. On the other, though, it provided the practitioners with a more critical approach to the subject of the development of socio-economic alternatives in agriculture. The FAAN project allowed for the inclusion in the research of scientific, practical, expert, local, national and tacit knowledge. As a result, this led the research in the direction which the researchers were initially unable to predict. At the same time, it has to be noted that to conduct co-operative research in practice is complicated. Most of all, it has a processual nature, each stage of the project must be analysed from two perspectives: the technical standard of practising science and the processes of knowledge integration occurring within the consortium and between the researchers and those investigated. The FAAN project was less linear in nature than the research projects in which the authors participated earlier. The objectives, definitions, and techniques evolved together with the participants. It was also a highly complex organisational undertaking. It was necessary to guarantee the possibility of deliberation and operation to approximately 30 persons from 10 organisations coming from 5 very different European countries. In the phase of the research design, the stages of commonality and differentiating, space for discussion and conflicts had to be considered. The specific resource distribution was determined by the key meaning of social interactions. A relatively large amount of resources was allocated for team meetings and the social component within which the processes of partners' integrating were observed. This required a radical change in the approach to research funding and schedule design.

The CR, with its inherent postulate for knowledge integration, upstream engagement and social learning, raises another issue overlooked in social science handbooks of methodology and research methods and techniques. What is meant here is the micro-strategies of managing research teams at the levels of consortium and national teams. Moderation of group processes, joint decision-making, building social relations and trust between team members, and resolving unavoidable conflicts becomes as important as analytical expertise in CR. In the environment defined in this way, apart from possessing strictly substantive competences, team leaders have to perform functions which are relatively new to scientists, namely, those of team managers and group processes promoters. It is only the combination of the role of researcher and moderator that increases the chances for proper integration of various knowledge systems within single research. If the research is to build a hybrid ground, connecting different research perspectives, especially the social scientists have to acquire new soft social competences seemingly unrelated to practising science. It can be added here that in the FAAN project, the role of experts, teachers in the process of communication and common decision-making was primarily played by NGOs activists who do it on a daily basis.

The FAAN project allowed for the development of a series of recommendations for individuals or teams who wish to execute the co-operative research model in the future [29]:

- Bottom-up engagement: if the research project is to connect different systems of knowledge and persons coming from different sectors, then a possibility to jointly plan research activities at the very project proposal stage needs to be ensured. The sense of co-responsibility and influence on the designed activities must be built as soon as possible.
- Time: in the co-operative research design, it is necessary to include in the schedule the additional time needed to developing relations and communication between partners. This kind of research will always take longer than those based on the classic hierarchical approach.
- Reflexive project steering: the research coordinator's role is a major one. They have to take into account the processes of differentiating and integrating of partners' experiences and the specific dynamics of group processes within the research team. The FAAN project showed that the leaders' coaching and animating skills play a significant role here – at the same time, it has to be stressed that in the case of CR, there is no single golden standard. The consortia vary just like the individuals who make them.
- Flexibility: as has often been underlined in this article, co-operative research is processual, and it cannot be designed in advance. Both the leaders and the researchers must be able to adapt to the changing objectives and the emerging issues and solutions.
- Interaction: the precondition for the process of knowledge integration, which is the essence of CR.
- Transparency: the success of building the relations of trust between the researchers within the team depends on it. It refers both to the way of making decisions and to the possibility of open participation in the team's discussions.
- Use of language: is necessary to ensure proper communication within the project. It implies both the technical expertise of languages and the commonality of senses, that is whether the team members use uniform definitions of the same notions.
- Face to face meetings: partners' communication should occur based on direct meeting of the whole team. The FAAN experience shows that the use of the new technologies, like fora, cyber-groups, Internet communicators, is not sufficient for the relationships between the group members to develop. The organisation of extra events (study tours, eating out together, sightseeing) additionally amplifies the processes within the group.
- Partners' roles and expertise: at the beginning of the project, the expectations and expert abilities of particular consortium members need to be very clearly specified. The planned activities have to take into account the differences in the competences of the team members.
- Power relations: lack of balance may lead to the halt of the integration processes. Choosing the CR mode, we agree to treat all types of knowledge equally. Also, within particular teams, it is necessary to aim at levelling the disproportions between persons of different scientific status.
- Long-term relationships: co-operative research does not end when the funding has finished. There emerge strong bonds within the group and there are practical and academic objectives. It seems that the sustainability of the bonds is a good indicator of how open and integrating the project actually was.

Finally, we would like to stress that the FAAN project showed us how complicated the process the co-operative research is. The time devoted to decision-making, the amount of resources allocated for the research, hours spent on the attempts to coordinate the expectations and our knowledge cannon though overshadow one key

aspect – in our view, the selected mode of conducting research allowed for a completely new perception of the subject under study. And this remains the biggest advantage of CR.

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**SOCIAL FACTORS IN THE IMPLEMENTATION OF AGRICULTURAL DEVELOPMENT  
(ON THE EXAMPLE OF LOWER SILESIA)**

**Abstract**

The scientific objective of the research conducted on Lower Silesia in 2013 was to identify social factors that influence the implementation process of agricultural development in agricultural holdings. The processes of land concentration proceed very slowly and the agricultural structure is dominated by small farms with low economic viability where income from farming is not sufficient to maintain the family, and surely does not provide any possibilities for development of such farms. To increase the productivity and efficiency of agriculture, it is necessary and essential to speed up the absorption of progress in agricultural holdings of 5 to 50 ha in area.

**Key words**

Agricultural development, Lower Silesia, individual farm

**Introduction**

The research focused on agricultural development in the Polish research tradition concentrates on two areas: research on modernization [1-3] and research on the diffusion of innovation to agricultural holdings [4-8]. One of the objectives of the conducted research was to find out - empirically - to what extent the process of state-forced modernisation has been disseminated and accepted by farmers. The research shows that the owners of agricultural holdings adopted technological development interpreted as agricultural engineering (substitution of human labour) to the greatest degree, the development in chemicalisation interpreted as correct use of fertilisers and pesticides to a lesser degree, and the biological development to the smallest degree. There is a gap in the research because the researchers had little interest in the process of agricultural development absorption in the 1980s and during the subsequent political transformation until the accession of Poland to the EU. Of course, there is a number of studies concerning the impact of agricultural advisory services, but this institution is one of many entities that actively implement agricultural progress in agricultural holdings.

In the general awareness, agricultural development is connected with innovations in agriculture. The claim that everything new is innovative is a threat. On the other hand, innovation cannot be reserved only to a small circle of specialists and institutions. The issue of definitions is an important one because agricultural innovations appear in key EU documents. Agricultural development is a term that has several definitions developed by the representatives of agricultural and social sciences [7, 9, 10: 193].

In the studies conducted, the concept of agricultural development has taken into account biological development, technical development (including mechanical and chemical development) and technological development [10: 202-203].

In the conditions of industrial agriculture, the fulfilment of economic, environmental and social objectives was difficult to reconcile. The concept of multi-functional agriculture - sustainable in theory and implemented in practice under CAP - is to enable the reconciliation of such objectives. The anticipated effect is high productivity of agriculture with simultaneous respect for the environment, preservation of biodiversity, and maintenance of cultural heritage of rural areas. It can be assumed that the best way to increase the yield produced by agricultural holdings is the implementation of agriculture development.

The goal of the project was to obtain knowledge on how the implementation mechanisms in the scope of agricultural development look at present, especially of biological development whose dissemination is particularly emphasised in the concept of sustainable development of agriculture and rural areas.

There are certain social factors that influence the implementation of agricultural development. The scientific objective of the project was to identify social factors that influence the implementation process of agricultural development in agricultural holdings 5 to 300 ha in area.

It is difficult to define clear boundaries between development and innovation. The greatest number of studies in the field of diffusion of agricultural innovations is provided by rural sociology. A large part of the work on this subject was created based on American rural sociology and concerned the mechanism of assimilating and spreading innovations in the practice of farms. Works by B. Ryan and M.C. Grossa, on the dissemination of corn hybrids among farmers in two Iowa villages, is, according to B. Gałęski, a classic study that has led to the development of diffusion theory of innovation [5: 71]. Ryan and Gross found that the statistical distribution of innovation adaptation is similar to a normal distribution.

In the 1950s, there was a rapid increase in research conducted on the diffusion of innovation. The classic work of E.M. Rogers, *Diffusion of Innovations*, was published in 1962. For E.M. Rogers, innovation is an idea perceived by the individual as new [4: 70]. According to J. Styk, it is irrelevant whether the objectively given idea is old or has arisen relatively recently. The most important thing is whether in a particular community it is considered as new. The author draws attention to the experience of members of a particular community [11: 43-58]. Rogers distinguished five categories of innovation users: innovators, early adopters, "early majority", "late majority" and marauders. The proposed division is an ideal type that does not necessarily correspond to the actual distribution of innovation users.

In the work *Chłop i zawód rolnika* from 1963, B. Gałęski analyzes the phenomenon of professionalisation of the farmers in connection with the industrialization of the country and agricultural policy of the state. The work concludes that with the increase in specialization of farms, the pace and scope of the innovations adopted increased because of methods of production, agrotechnical treatments as well as new tools of work [12].

Polish researchers pointed out that factors that strongly influenced the phenomenon of assimilation were the professional position of the individual, its prestige and the scope of non-environmental contacts. More elements of agricultural progress have been adapted by farmers who are socially active in different organizations and have more contacts with non-governmental organizations [13: 178-179].

J. Turowski and a group of sociologists from the Catholic University of Lublin conducted a study in which pairs of villages were selected from one region of the voivodeship Lubelskie with similar objective conditions, and differing significantly in the degree of socio-economic development. A total of 8 villages was analyzed in terms of productivity, degree of mechanization, level of institutionalization of public life and number of "common facilities" that were available to the general population. The results published in *Drogi modernizacji wsi. Przenikanie innowacji do rolnictwa i wsi województwa lubelskiego* [1] concerned the differences between modernized and less developed villages, innovation information channels and the conditions for dissemination of innovation. The author presents the role of social factors and local communities in the process of modernization, innovative farmers and leading farms, and the exchange of attitudes and patterns of behavior. Attention has also been paid to the importance of neighbors and families in the process of diffusion of innovation. The role of these informal groups is very large, even one can talk about the phenomenon of a kind of reintegration of ties [1: 288]. Concluding their reflections, the researchers wrote about the "coexistence" of elements of tradition and modernity within the countryside and farm.

In summarizing the achievements of the 1960s and 1970s, Bukraba-Rylska writes that the domain of Polish research on diffusion has become a comprehensive analysis of the rural reality, taking into consideration the basic fact that the village is a co-dependent arrangement which includes the farmer's personality, family, farm, local community and culture [7:329]. Another indication was the indication of the significance of the local system and emphasizing its significant influence on the process of modernization, "(...) the perception of complex relations between the village and its surroundings, and - already within the village - the unequivocal relations between elements of tradition and modernity" [7:331].



## Methods

In the conditions of a market economy, it is possible to identify four types of entities operating in the external environment of agriculture which - to different degrees - influence the process of progress implementation in private farms:

- 1) Polish and foreign companies whose objective is the production and distribution of industrial inputs (sowable material, pesticides, mineral fertilisers, machines and equipment necessary for crop and animal production).
- 2) State/local government institutions whose objective is to disseminate agricultural progress (e.g. agricultural advisers). Such institutions accomplish long-term objectives of agricultural and social policy addressed to rural areas. The institutional system of the state influences the entities involved in bringing and accepting the progress to/in agricultural holdings (such as the Agency for Restructuring and Modernisation of Agriculture, the Agricultural Property Agency).
- 3) Institutions of the “knowledge triangle,” such as higher education institutions in the area of agriculture, research centres (e.g. Variety Assessment Experimental Stations) that provide education, research and create innovation [14: 90].
- 4) Modern, large private enterprises as well as State Treasury agricultural holdings which are the sources of models of good practices in the application of modern pesticides, fertilisers, machines and equipment as well as appropriate agrotechnical procedures for farms operating in their vicinity.

The land concentration process, regardless of statutory regulations in the scope of land trading, is restricted. The changes in the agricultural structure proceed very slowly (Table 1.).

Table 1. Number of agricultural holdings in the years 2003 and 2010 (in thousand)

	<1 ha	1-2 ha	2-5 ha	5-10 ha	10-20 ha	20-30 ha	30-50 ha	50-100 ha	100 + ha
2003	27.5	931.7	485.6	372.5	246.7	60.5	29.8	11.3	6.6
2010	8	355.2	468.2	335	218.5	60	35.39	16.8	9.7

Source: *Gospodarstwa rolne w Polsce na tle gospodarstw Unii Europejskiej – wpływ WPR* [15:14].

In the period from 2003 to 2010, the biggest decrease - by about 60% - of the number of agricultural holdings was noted in the group of holdings with the smallest area (0-2 ha). The number of holdings with the area of 5-30 ha decreases quite slowly, and the number of larger holdings with areas of 30 ha slowly increases. Some of the holdings from the group of 5-15 ha passes to the groups with larger area and some of them to lower area categories [16]. The land concentration ratio in Poland is low in comparison with EU countries at 30% [17: 20]. Big agricultural holdings and agricultural enterprises increased their area mainly through the purchase or lease of land coming from the resources of the State Treasury. The transfer of land between private farms influenced the dynamics of concentration processes to a lesser degree.

W. Józwiak calculated that bigger holdings, that is of 16 and more ESU and with competition and development capacity produced about 63% of national agricultural production in 2010, and at the same time did not exceed 5% of the total number of holdings in Poland [18: 31].

In the present situation, the key issue for the increase in the productivity of agricultural holdings, especially those with between 5 and 50 ha, is the implementation of agricultural development. It is essential to identify the factors facilitating or hindering agricultural development implementation. The channels providing the information about agricultural development are also important.

Doctoral dissertation research carried out by me in the Dolnośląskie Voivodeship (2013) shows some regularities in the process of agricultural development absorption. The research covered two groups of respondents: the representatives of companies offering industrial inputs, and private farmers from holdings with between 5 and 300 ha. The research involved the participation of 22 regional sales representatives operating in the area of Lower Silesia, of which 11 represented seed companies, 6 were companies producing pesticides, and 5 were companies with combined offer of sowable material and pesticides (Causade Polska, Danko Hodowla Roślin, Hodowla Roślin Smolice – Grupa IHAR, Hodowla Roślin Strzelce, KWS Lochów Polska, Lantmannen SW Seed, Limagrains Central Europe Societe, Maisadour Polska, Małopolska Hodowla Roślin – HBP, RAGT Semences Polska, Saanten-Union Polska, BASF Polska, Bayer Crop Science, Dow Agro Science Polska, Du

Pont Poland, Sumi Agro Poland, Syngenta Crop Protection). The study was conducted using an interview questionnaire. The number of conducted interviews with farmers is presented in Table 2.

Table 2. Number of individual farms in Lower Silesia and number of interviews conducted

Area group of individual farms	Number of individual farms (According to PSR)	Structure in area groups in%	Number of interviews
5-10 ha	13548	45,3	91
11-15 ha	6139	20,5	41
16-20 ha	2944	9,9	20
21-30 ha	2758	9,2	18
31-50 ha	2107	7,0	14
51 + ha	2422	8,1	16
Amount	29918	100%	200 interviews

Source: *Charakterystyka gospodarstw rolnych PSR 2010* [19: 442–443] and author's calculations

After World War II, almost the whole population of Lower Silesia was replaced and the region was settled with people arriving from different regions of Poland and Europe. The next argument for the selection of Lower Silesia was its strong urbanisation. The proximity of local markets where the products may be sold and simultaneous possibility of procuring relevant inputs by farmers is a significant element influencing the development of agricultural holdings.

## Results

Holdings of lower economic viability are traditionally 5 to 50 ha, excluding special parts, such as orchards, vegetable growing farms, and ponds. The farmers from such holdings produce such a considerable surplus that even with full naturalisation of consumption, they are not able to consume it. Therefore, such holdings are connected with the market. Yet, pursuant to own research, the market environment (providing industrial inputs) takes little interest in establishing direct relations with the owners of small farms, even though their number is very high.

The companies competing in the markets for inputs have similarly defined target group; those who have holdings of an area exceeding 50ha. The groups of farmers with holdings up to 50 ha of arable land are not interesting enough for regional representatives to concentrate on establishing direct contact with them. Some representatives are aware that the holdings which they view as “medium-sized” (up to 50 ha) are somehow “excluded” from access to the most recent information. There are different methods of reaching the farmers from holdings of different areas with the information about the products offered by a company. The method that is the most often applied to the group of farmers with land from 16 to 50 ha is the presentation of the company offer during the meetings organised with other companies (e.g. the event entitled “Days of Fields”). In the case of the owners of holdings exceeding 50 ha of land, the best method of winning the clients was to establish direct contacts.

The study reveals that the companies simply assume that the bigger holdings are market holdings, and therefore similarly to large agricultural holdings need to focus on minimisation of human labour and on financial outlays on inputs to increase the efficiency of its operations. Pursuant to the research by anthropologists, the value of work is not taken into account in economic calculations in terms of family farming. Labour consumption by individual types of production, and the decreasing number of members in a family, increasingly influence the decisions concerning the development of the holding and decisions concerning production. The smaller the need of human labour in a given type of production, the more inclined the farmers are to undertake it [20: 14-16].

Big holdings are objectively the biggest clients in the market for inputs. The competition for those clients has not only the form of extending the scope of cooperation with non-commercial activities, but is focused on

financial instruments, such as what package of benefits is offered by the company with relatively similar products in terms of quality. The assumption is that the bigger the package is, the greater the opportunity to win a given client. However, studies do not show that the farmer buying sowable material and pesticides uses the offer of only one company. They choose the offer with the biggest number of benefits.

In the times of centrally planned economy, the implementation of agricultural development was the responsibility of the state institutional system. At present, the regional representatives of companies are active entities introducing agricultural development to private farms. In their work, they combine the elements of scientific knowledge by inviting the representatives from universities to meetings organised by them and referring to the results of research and studies carried out in higher education institutions. They also combine management competence through the use of increasingly effective sales techniques by organising informational meetings and events promoting new products, and local knowledge. If they do not know local conditions, they cannot effectively advise in the scope of specific varieties; they often win new clients through recommendations by farmers with whom they cooperate [21].

The entities producing inputs in the conditions of the market economy gain their competitive advantage through supplying inputs which are all the time improved in terms of quality and through developing effective distribution networks for the produced goods. A significant element of the organisation of such networks is the informational activity conducted by them in the scope of the products offered, their application and quality in comparison with similar products offered by competing entities. It is a form of introducing development to agricultural holdings which, through the activities undertaken by sales representatives, can be significantly more effective. In particular, when the representatives reach broad group of farmers directly. The limitation of direct contacts to farmers with more than 50 ha and efficiently operating holdings is not, in my opinion, an optimum solution for the effective implementation of agricultural development [22]. Smaller holdings usually have only indirect access to information about new varieties of plants and stock that will produce higher yields, such as during organised industry meetings at the regional or national level. The holdings which would like to use new varieties of plants pay higher prices and do not receive such economic bonuses as those proposed to bigger holdings (exceeding 50 ha) in the case of direct contacts with sales representatives.

The second category of respondents included the owners of holdings between 5 and 300 ha. There are different factors which influence the absorption of different kinds of development, including biological, chemical and technical. Farmers are still convinced that progress means mainly agricultural engineering (mechanisation). It is possible to identify two reasons for such a belief. First, labour resources decrease in families of farmers because their members increasingly often undertake work outside their farms. Second, agricultural machines, mainly tractors, are a factor influencing the prestige of a given person in rural communities, the type of a tractor owned influences social rank taken by a given farmer in a rural community.

The implementation of changes in agricultural holdings after the accession of Poland to the EU referred mainly to changes in plant and machinery, planned changes in the purchase of land, the use of pesticides, and by the end the use of new varieties of farming plants.

The studies reveal that the knowledge of biological development is scarce. The same low level applies to advantages arising from it and the programmes aimed at the dissemination of knowledge about such progress co-funded from the means expanded by local authorities. The literature shows that the level of crop planning should be necessarily increased in Poland by about 20%. The knowledge of Post-Registration Variety and Testing programme was declared by 100% of sales representatives and 10% of farmers. At present, biological development is viewed as the most important tool for increasing the crop of farming plants. Yet, the interest in the PRVT system seems to be present only among those for whom variety studies are a passion.

The owners of holdings are themselves responsible for introduced varieties. The role of advisers and sales representatives from the business environment of inputs is noticed by them but assessed as of little importance. Even in the case of big enterprises, it is a task of representatives to reach farmers with the offer and convince them that they should change pesticides or varieties used by them thus far.

The meetings which are organised for farmers with the objective to disseminate the knowledge of different kinds of agricultural development are of moderate interest for them. Agricultural education and the area of a managed holding are the factors which influence larger interest in such type of meetings. Younger users of

holdings were more willing to take part in meetings organised for farmers. The change after the meetings organised for farmers was declared the most often by the owners of holdings with area exceeding 20 ha of arable land. It may be assumed that they were more interested in obtaining a higher yield from their holdings without changing its area.

In Lower Silesia, the influence of large agricultural holdings (exceeding 300 ha) is noticeable mainly through the transfer of information by their employees. This method is mainly used by the owners of holdings with smaller areas up to 15 ha. They confirm that they learn about new pesticides and new varieties from their acquaintances employed in such holdings, and based on such information implement them in their own holdings.

The influence of EU financial instruments intended to modernise agricultural holdings was the most noticeable in agricultural holdings with larger areas. The simplified aid scheme is also more advantageous to holdings with large areas.

### Conclusions

S. W. Kłopot writes that if we assume that small holdings (up to 5 ha - (note by Barbara Szczepańska) will be of auxiliary character and the activity carried out in them will concentrate, to a larger degree, on non-economic values, then we are still left with the issue of holdings with arable land from 5 to 20 ha (...). At present, there are no opportunities for their development, or, given the realities of local labour markets, for discontinuing the activity of such holdings and liquidating them [23: 110]. Therefore, I assume that the implementation of agricultural progress elements may influence the growth of income from agricultural holdings in those with an area from 5 to 50 ha of arable land.

According to the research presented, there are certain social factors that influence the implementation of agricultural development.

The research and other studies enable the identification of some determinants of the process of implementing agricultural development elements in agricultural holdings: age and education of the main user, and, to a significantly higher degree, the size of the managed agricultural holding. The bigger the area of the holding, the more the owners are inclined to absorb different factors of agricultural progress. An important factor is also direct contacts with sales representatives.

The holdings exceeding 50 ha are connected with the inputs market and markets for agricultural products. In such holdings, agricultural development is absorbed the most quickly. Pursuant to this research, sales representatives establish permanent relations with owners of big and large holdings, and the agricultural development elements are implemented there at first.

Medium-sized holdings are a kind of transitional category. They may develop depending on the resource level in the holding and the ability to absorb agricultural development factors.

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