

**SOCIAL EXCLUSION IN THE RURAL AREAS
– CHOSEN NON-MONETARY INDICATORS
IN THE REGION OF WIELKOPOLSKA**

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Abstract. Together with the European integration, an opportunity to increase the transparency of key policy priorities of overcoming of social exclusion appeared. Selected indicators of social exclusion related to unemployment and education level were discussed in this paper. The paper also aims to reveal the problems of social exclusion and discuss the most significant activities towards its reduction. The influence of long-term and permanent unemployment on exclusion from society was presented. The impact of education on unemployment size, as well as the need for greater and more efficient investment in human capital were discussed.

Key words: poverty, social exclusion, unemployment, education, rural areas

INTRODUCTION

Social exclusion is a research area that currently has become more significant. It concerns both social groups commonly considered as poor and groups which in material dimension are regarded as poor. High growth rate of number of people threatened by poverty influenced the development of research on this question. Together with the social awareness increase, the search of new forms of counteracting poverty has started. Poverty is identified mainly as lack of money; social exclusion is treated somewhat wider. It is understood as a link between such factors as: unemployment, low income, life standard, health, education, homelessness etc. This notion has become a key element for various problems of social character and its understanding. The example of taking into consideration the mutual correlations between these occurrences is the report

on homelessness in Europe. In this report it was stated that the solution must be something more than a shelter protection only. Also in case of poverty, a deep study on its causes and complex solutions is essential. The research should focus on all elements of socio-economic life of rural population, because the marginalisation increases the feeling of helplessness and dysfunction of families.

A definition of social exclusion is difficult to formulate, which is mainly a result of many views on social marginalisation. In Polish law, in the Act of 13th June 2003 on social employment [Ustawa... 2003], it is defined as a life situation, in which persons or households are not able to satisfy their needs and are exposed to poverty, which causes that their participation in professional life is limited and sometimes in fact impossible. The significant problem is that social exclusion mainly refers to the groups that live in poverty: the unemployed, rural population and people with social problems.

MATERIAL STUDIED, AREA DESCRIPTIONS, METHODS

Social exclusion indicators are chosen, as the subjects of the paper, in particular the ones that concern unemployment, its duration time and education of rural population. The discussion on poor rural population adjustment to marginal conditions and reduction of their expectations was undertaken. The author's own research, which was conducted in 2004 and 2007 in all districts of the Wielkopolskie Voivodship and the data of the Central Statistical Office concerning rural population constitute the data resource. In 2005 the sampling quota totalled 786 and in 2007 559 responders from rural areas of the Wielkopolskie Voivodship. To achieve this, a questionnaire consisting of 88 questions divided into 11 thematic blocks was prepared. The selected answers from the V, X and XI block were used in the paper. These were: economic activity of respondents and their household, education and subjective poverty. The inquiry was conducted in households in rural areas in all districts of the Wielkopolskie Voivodship. The inquiry results were based on respondents' experience, therefore they may contain errors of non-random nature. The sampling had a purposeful character.

The aim of the paper is to present the problems of social exclusion and discussion on the most important activities towards its reduction. The long-term and permanent unemployment influence on social exclusion was shown. The education influence on unemployment size was discussed and the need for wider and more efficient investment in human capital, independently of age, was indicated.

RESULTS AND DISCUSSION

One of the most important problems in rural areas is lack of workplaces. It has determined poverty and social exclusion to a high degree. Effective activities towards its reduction require integrated and complex approach of economic, employment and social protection policy at each decisive level: in macro, branch, regional and local scale. It is not possible without changes in institutional conditions [Kabaj 2000]. One fourteenth of the households in Wielkopolska has not got any working member. In regard to that the programs of counteracting unemployment towards activating people without job are

needed. This problem to a similar degree concerns urban and rural population (7%, 6.8%). Somewhat more favourable indicator in rural areas results from the fact that rural families are more numerous than the urban ones, which increases the possibility to find a job by at least one person. The smallest share of the unemployed is in farmers' households, where each family member may work in agricultural enterprise. It results from regulations, according to which the unemployed is a person, who during the week precedent the research has worked more than one hour in a household. Such strict regulations caused that only in 29% of those households is a person without job (level comparable with 2004). Households having agricultural enterprise (56.3%) constitute the largest share of households with the unemployed, which in comparison to 2004 has increased (Fig. 1).

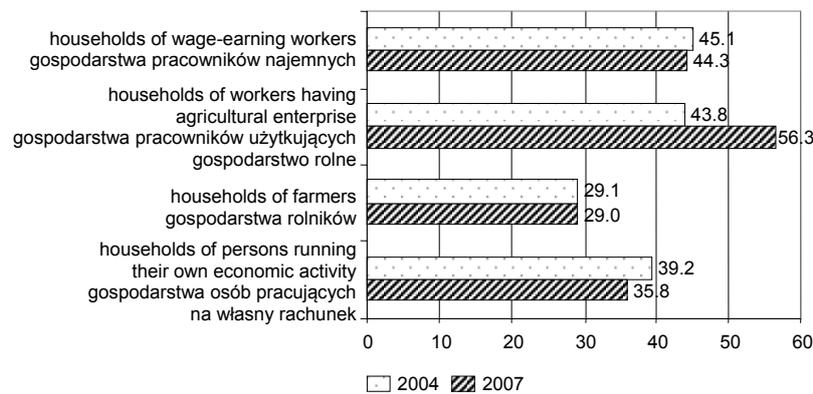


Fig. 1. Households with the unemployed according to their income source
Source: author's own research.

Rys. 1. Gospodarstwa z osobami bezrobotnymi w zależności od źródła utrzymania
Źródło: badania własne.

The most important problem with unemployment occurs in households living below subsistence minimum; in more than 45% of them there are persons, who cannot find employment. Together with increase of income – considered as the poverty border – the number of households with unemployed persons is falling and in case of relative poverty with the border of 40% of equivalent incomes median amounts to 37.5% (Fig. 2). Although unemployment influences the income decrease and lowers purchasing power of households resulting in smaller demand for goods and services, one should remember that searching solutions and methods of counteracting poverty and social exclusion only at the incomes level not always leads to complex problem solution. Simultaneously, it is a significant economic obstacle in activating and development of economic undertakings. Local markets of limited demand absorbency through low consumer income shift the demand to the grey zone [Pretty and Ward 2001].

A dangerous occurrence is the unemployment derived from a long period of joblessness and small market effectiveness. It is a result of the fact that it can have pathologic character. The long-term unemployment has such features, which indicator in the Wielkopolskie voivodship amounts to 7.7%. The difference in the size of unemployment

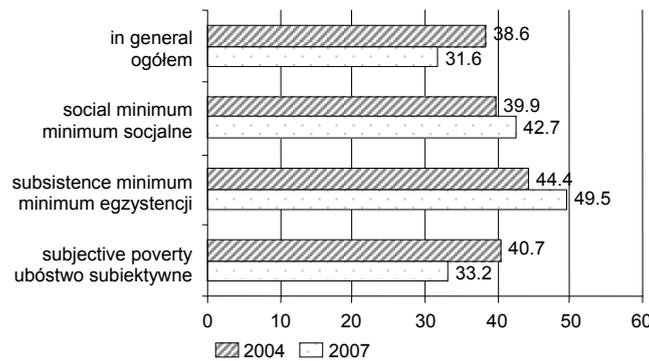


Fig. 2. The share of households with the unemployed according to the poverty line in 2004 and 2007

Source: author's own research.

Rys. 2. Udział gospodarstw domowych z osobami bezrobotnymi w zależności od linii ubóstwa w latach 2004 i 2007

Źródło: badania własne.

exceeding 12 months between rural and urban areas amounts to about 3 percentage points. Somewhat better situation is found in rural areas in case of permanent unemployment (exceeding 24 months). In this case the difference amounts to 2.6 percentage points. Every tenth woman has not got job more than 12 months, whereas in case of men – every seventeenth. Larger stratification is in case of remaining without job more than 24 months, and then women 2.2 times more often belong to this groups than men (Fig. 3). The unemployment rate, in particular the permanent one, has influence on

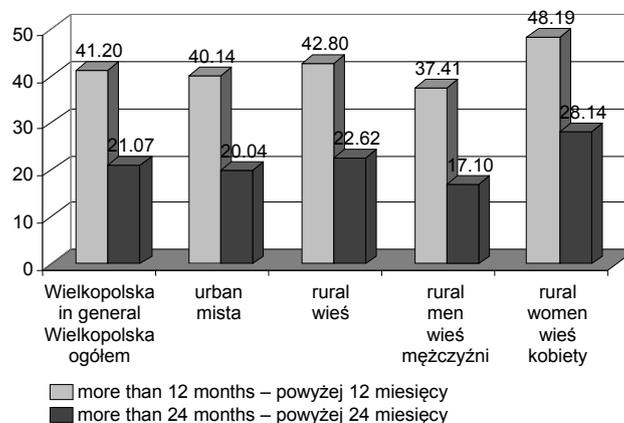


Fig. 3. Long-term and permanent unemployment in Wielkopolska
Source: author's own elaboration on the basis of the unpublished CSO data.

Rys. 3. Bezrobocie długotrwałe i trwałe w Wielkopolsce
Źródło: opracowanie własne na podstawie niepublikowanych danych GUS.

economic development of the region and opposite. Those feedbacks cause that in rural areas, where the economy does not generate the sufficient number of workplaces, high unemployment is growing and life standard is falling. That correlation causing specific inequality circle leads to limitation of favourable conditions to developing and supporting economic activity [Niedzielski and Domańska 2005].

The main feature of permanent unemployment is growth of social isolation and sometimes self-exclusion resulting from psychophysical conditions worsening. Therefore, many EU member countries recognised as one of the most important problems, the increase of share in labour market through widening of active policies and assuring close relation between social protection, constant education and labour market reforms to obtain the effect of their mutual strengthening. It results from the fact that the essence of exclusion is not the lack of job only, but the lack of job adequate to qualifications and skills of the unemployed, which additionally deepens their feeling of helplessness and strengthens difficulties in job searching [Frieske 2002]. Sometimes unemployment resulting from “skilled helplessness” leads to quick worsening of life standard, hampers the development of the unemployed and areas they inhabit. In regard to this, it is vital to undertake such activities as: social and professional education, advisory service, organising practice, social employment. Life standard improvement and rural areas development can be achieved through diversification of rural economy, mainly as non-agricultural production sections development. It will allow expansion of widely understood entrepreneurship, creating technical and social infrastructure, which simultaneously will create conditions for new investment.

Professional activation of the unemployed in rural areas is a significant condition of modernisation and income and material situation improvement. Revealing the workforce engaged in agriculture and shifting their efficiency must be conducted in frames of new workplaces in different economy sphere. Such policy will allow to reduce the unemployment and limit migration of rural population. Changes in rural areas and their restructuring based on reduction of number of agricultural enterprises and growth of production possibilities will allow to reduce development disproportions and will improve the life opportunities for rural population [Kłodziński 1996].

Unemployment reduction is not possible without education level improvement, therefore it is vital to encourage the youth to further education on the secondary and higher levels. It is very important, because almost every fourth person in rural areas at the age between 18 and 24 has not got higher than elementary education. Men are in worse situation, since they more often women (by 3.9 percentage point) have not got higher than elementary education. Progressing globalisation and increasing significance of immaterial development factors, such as human, social and cultural capital causes that finding a job is much more difficult for these persons. An important problem of rural areas is the fact that in 11.5 of households are children and young people who do not continue education. According to the inquired the main reason is lack of money (more than 50%), but every fourth respondent stated that a child has gained sufficient education and therefore does not have to study any more.

The will to continue education by young people is mainly dependent on the life standard. In every sixth household there is a person, who is not more than 24 and does not continue education. Somewhat fewer persons (14.4%) who finish their education at elementary level or at basic vocational school are in households living in extreme poverty (Fig. 4). Educational aspirations of rural population should be a challenge for the

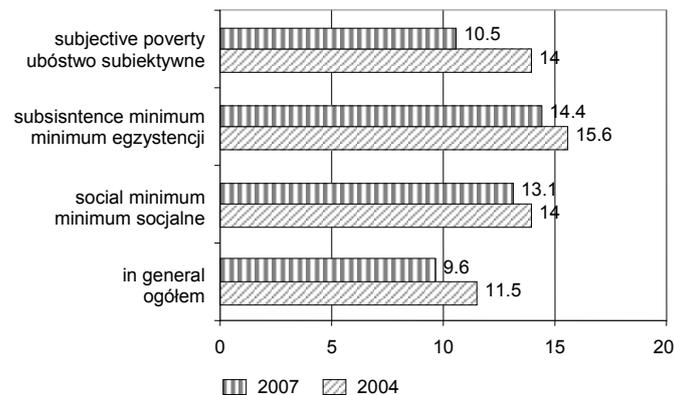


Fig. 4. The share of persons not older than 24 not continuing education, according to the poverty line in 2004 and 2007

Source: author's own research.

Rys. 4. Udział osób w wieku do 24 lat, które nie kontynuują nauki, w zależności od przyjętej linii ubóstwa w latach 2004 i 2007

Źródło: badania własne.

present elites. The occurrence of discontinued of education at secondary level concerns mainly farmers' children (13.3%) and workers having agricultural enterprise (18.8%), therefore the income source becomes the variable that significantly differentiates young people.

Taking into account the coefficient of education of persons at the age between 25 and 60, one can observe a significant disproportion between rural and urban areas. When in rural areas the coefficient of persons of not higher than elementary education amounts to 30%, at the same time in urban areas it is lower by 18.4 percentage points and amounts to 11.6%. It is partly explicable by intelligence outflow from rural areas, which additionally deepens differences between rural and urban areas, both in social, economic and political life. Such large differences in education level prove the educational gap. It is worth to mention that the gender proportions are changing in case of not higher than elementary education. When among young people between 18 and 24 men are more often less educated, in case of persons at the age of more than 24 that proportion is opposite, every third woman has education lower than secondary and in case of men – only every fourth (Fig. 5). Therefore the activities related to more efficient investment in human capital become essential, independently of age, through constant education improvement, related to computer science and up-to-date science trends, cost-free additional schooling and training in fields, for which there is a local demand.

Education has significant meaning for a human both in capital dimension, which is brought to the labour market, and personal development, not related to economic perspectives. Very often young man does not take into account the meaning of education, how much they can gain on labour market due to education and what the production effects of education are. Education improvement increases both the person's and co-workers efficiency. Therefore education is classified as a socially required good, which

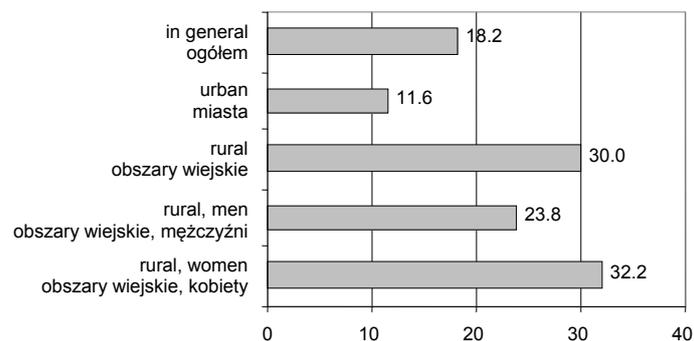


Fig. 5. Coefficient of persons with not higher than elementary education
Source: author's own elaboration on the basis of Raport... [2003].

Rys. 5. Współczynnik osób z wykształceniem niewyższym niż gimnazjalne
Źródło: opracowanie własne na podstawie: Raport... [2003].

means that governments should encourage citizens to education through education availability improvement [Baran 2005]. Knowledge, as Drucker [1999] claims, is and will be the basic economic resource converting fundamentally the social structure, creating new social, political and especially economic forces. Therefore one can believe that knowledge level increase favours unemployment reduction and limitation of social exclusion.

CONCLUSIONS

Social exclusion is significantly related to poverty, but one cannot say it is the same. Poor persons are not always socially excluded and opposite – excluded persons do not have to be poor. Despite that fact the area of co-occurrence is considerable. Life standard improvement of rural areas population cannot exist without financing by non-governmental organisations and governmental centres of private sector, human resources development, programme of non-agricultural employment increase, education improvement in rural areas, strengthening of local and regional administration institutions and infrastructure development.

Polish rural areas first of all need non-agricultural workplaces and better inhabitants' equipment in qualifications supporting their positions on labour market and access to higher education. It is an element significantly influencing life standard of rural population. Solution to the issues of inequality in education system is based on counteracting not continuing education and enabling passing from training to labour market. It is important that persons who cannot continue education should have access to education and could integrate with mainstreams of schooling. Together with the European integration the opportunity to increase transparency of key priorities of policy of coping with social exclusion appeared. However it is not possible without the increase of activities towards social inclusion of rural population through research promotion and exchange schemes.

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**WYKLUCZENIE SPOŁECZNE NA OBSZARACH WIEJSKICH
WOJEWÓDZTWA WIELKOPOLSKIEGO – WYBRANE WSKAŹNIKI**

Streszczenie. Wraz z integracją europejską wzrosła możliwość przewycięzania problemu wykluczenia społecznego. W artykule omówiono wybrane wskaźniki wykluczenia społecznego, związane z bezrobociem i poziomem wykształcenia. Praca ma na celu wskazanie problemu wykluczenia społecznego i rozpoczęcie dyskusji na temat najważniejszych działań zmierzających do jego ograniczenia. Przedstawiono również wpływ bezrobocia trwałego i długookresowego na marginalizację ludności. Omówiono też wpływ edukacji oraz potrzebę bardziej efektywnego inwestowania w kapitał ludzki.

Słowa kluczowe: ubóstwo, wykluczenie społeczne, bezrobocie, edukacja, obszary wiejskie

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