

# A c t a Universitatis Lodziensis

**FOLIA SOCIOLOGICA**

87  
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## **Sociology of Paweł Starosta – inspirations**

edited by

**Małgorzata Marks-Krzyszowska**

**Agnieszka Murawska**

**Jakub Ryszard Stempień**

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## EDITORIAL

Volume 87 of the quarterly “Acta Universitatis Lodziensis. Folia Sociologica” appears in the year of the 50th anniversary of the scientific work of Professor Paweł Starosta at the University of Lodz. Wanting to emphasize the Starosta’s contribution to the social sciences and to celebrate the jubilee, we have prepared a volume entitled “Sociology of Paweł Starosta – inspirations”.

The invitation to participate in this project, was addressed to the interdisciplinary and international scientific community. We are pleased to have received a response from the Jubilarian’s colleagues, alumni and friends, who in this way also wanted to express their tribute or gratitude to him.

The vast majority of the articles we publish in the volume are embedded in the field of rural and urban sociology research, which Paweł Starosta himself successfully conducted. They show the transformations of urban and rural local systems that are (both positive and negative) effects of the transformation and globalization processes experienced in Poland and other former communist countries. Starosta not only acted as a researcher, but also as an eyewitness to these processes. The layout of the publication is therefore not accidental. It reflects the multifaceted nature of the issues addressed and Professor Paweł Starosta’s willingness to take on complex topics that require interdisciplinary and international cooperation.

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It was also our intention, as editors, to provide an opportunity for the exchange of views and experiences, as well as to inspire further creative explorations in problem areas related to Professor Starosta's scholarly legacy, such as:

- human and social capital resources;
- patterns of participation in public life;
- territorial relations in the era of globalization;
- transformations of rural and small-town local communities;
- revival of post-industrial cities;
- local development.

\* \* \*

The article by Wojciech Knieć and Elwira Piszczek refers to Paweł Starosta's consideration of social capital. It turns out to be highly useful for explaining the peculiarities of "civic rurality" in Poland, the advantages and disadvantages of leadership social capital, the scarcity of network linkages of the rural non-governmental sector, and the clash between the high level of a sense of empowerment and disillusionment with the unfavorable situation of social activity in local communities.

In the article by Agnieszka Murawska and Małgorzata Marks-Krzyszowska, we find an overview of Paweł Starosta's research output focused on the issue of civic participation in local communities in Poland and abroad. These analyses show the phenomenon of involvement in public affairs over several decades, covering the period of the political transformation, as well as just before it. They confirm the relatively low level of citizen interest in public affairs.

Wielisława Warzywoda-Kruszyńska and Kamil Kruszyński presented the social aspects of the systemic transformation in Poland, focusing on the difficult situation of Lodz inhabitants, especially children. The authors stressed that Lodz – unlike other cities – was forced to look for solutions on its own. This is because it did not receive an adequate support program from the central government. The traumatic experience of deindustrialization contributed to the city's contemporary demographic and economic problems.

Agnieszka Michalska-Żyła, on the other hand, in her article, refers to the concept of urban revival potential presented in Paweł Starosta's book "The Social Potential of the Revival Post-Industrial Cities". Attention, however, is focused not so much on potentials as on the mechanisms that trigger them, and centers around the idea of the 15-minute city. The assumption is made that the way the space is organized reflects the processes taking place in all spheres of city functioning, including those leading to its transformation.

Tomasz Dorożyński and Janusz Świerkocki, inspired by Paweł Starosta's regional research perspective, attempted to study the performance of special economic zones (SEZs) by province over 25 years and their role in reducing regional economic

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disparities. The research proved that SEZs did not contribute to reducing regional disparities measured by GDP per capita, and may even, in the authors' view, have increased them.

Jakub Ryszard Stempień, presenting his own theoretical view (called the social disintegration theory), refers to the Professor's interest in sociological theory, which he also exercised in the field of academic didactics. Stempień's theoretical proposal grows out of the tradition of the positivist paradigm in sociology, close to Paweł Starosta, also taking into account the dimension of global society.

Imre Kovach – in his essay – presented the situation of Hungarian rural society resulting from transformations occurring as a consequence of three main processes: the decline of the rural peasantry, the dismantling of the socialist system, and globalization as well as European integration. In the perspective of the transformation of local communities, the author refers to the work of Paweł Starosta, who proposes to use the concept of social bonds to study the organization of post-socialist local societies.

We sincerely encourage you to study the collected articles, to re-read the Professor's works, and to reflect on the contemporary context of the issues discussed.






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## ASSOCIATIONS, NETWORKS AND CIVIC VIRTUES: THE CONDITION OF NON-GOVERNMENTAL ORGANISATIONS IN RURAL POLAND VIS-A-VIS PAWEŁ STAROSTA'S REFLECTIONS ON SOCIAL CAPITAL

**Abstract.** In the work of Prof. Paweł Starosta, issues related to social capital have not only been discussed frequently but their various dimensions have also been dealt with. Social capital-related considerations, according to the authors of this article originally include the following issues: (i) a recognition of the predominance of associative functions of social capital over those that are of a generative nature, (ii) the attribution of particular importance to networks of cooperation, knowledge exchange and the benefits derived from individuals' abilities to situate themselves in these networks; and (iii) the cardinal importance of the "institutional encasing" of social capital given its quality and the specific quality of the social capital of the Polish Third Sector as the "capital of local leaders". The aforesaid perception of social capital was the frame of reference for us to analyse the material collected for their research on the condition of the Third Sector in rural Poland. Starosta's reflections on social capital were highly useful in considering the specific features of "civic rurality" in Poland: the advantages and disadvantages of leadership social capital, the paucity of network links in the third sector in the rural areas of the country and finally, the discordance between a high sense of agency, on the one hand, and disillusionment emerging from the unfavourable environment concerning social activism in local communities, on the other.

**Keywords:** social capital, non-governmental organisations, local development, rural development.

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## ASOCJACJE, SIECI I OBYWATELSKIE CNOTY. KONDYCJA ORGANIZACJI POZARZĄDOWYCH W POLSCE W ŚWIETLE ROZWAŻAŃ PAWŁA STAROSTY NAD KAPITAŁEM SPOŁECZNYM

**Abstrakt.** W twórczości naukowej prof. Pawła Starosty problematyka związana z kapitałem społecznym występuje często i w sposób wielowymiarowy. Oryginalność rozważań nad kapitałem społecznym według autorów niniejszej publikacji obejmuje następujące kwestie: uznanie przewagi asocjacyjnych funkcji kapitału społecznego nad tymi o charakterze generatywnym, przyznanie szczególnej ważności sieciom współpracy, wymiany wiedzy oraz korzyści płynących z umiejętności jednostek do sytuowania się w tych sieciach, wreszcie – kardynalne znaczenie „budowy instytucjonalnej” kapitału społecznego dla jego jakości oraz zwrócenie uwagi na specyfikę kapitału społecznego polskiego Trzeciego Sektora jako „kapitału lokalnych liderów”. Autorzy postanowili wykorzystać tak zarysowaną optykę postrzegania kapitału społecznego do analizy zebranego przez siebie materiału z badań nad kondycją Trzeciego Sektora na terenach wiejskich Polski. Stwierdzono wysoką przydatność rozważań Pawła Starosty nad kapitałem społecznym do wyjaśniania specyficznych cech „obywatelskiej wiejskości” w Polsce: zaletami i wadami lidarskiego kapitału społecznego, niedostatkami powiązań sieciowych wiejskiego Trzeciego Sektora, wreszcie – zderzenia się wysokiego poziomu poczucia sprawstwa z rozczarowaniem niekorzystnym klimatem wokół aktywności społecznej w środowiskach lokalnych.

**Słowa kluczowe:** kapitał społeczny, organizacje pozarządowe, rozwój lokalny, rozwój obszarów wiejskich.

### 1. Introduction

Reflections on social capital constitute an important part of Professor Starosta's multithreaded and multifaceted scientific output, in particular on social capital's significance in local and regional development. He has devoted several articles, reviews, commentaries and polemics to the subject.

The issue of social capital appears in Starosta's work in various ways, also indicating the direction of his reflections on the real-life manifestations of this concept. These include theoretical reflections and research concerning the types of social capital, its components and functions, social networks and network social capital, cooperation capital, forms and the role of social trust and their role in development and the importance of helpfulness and fairness in development. These themes also manifest in his scholarly work on local development in the broadest sense.

Starosta's theoretical reflections on social capital comprise *inter alia*, instructive and inspiring contemplations on the interrelationships between social capital (its quality and type) and citizens organised into associations. Here, on the one hand, we consider the influence of a certain type of social capital on the emergence, persistence (and form of persistence), mutual cooperation/competition and disintegration of NGOs. On the other hand, we consider the opposite relationship, where the quality

of social capital is determined, *inter alia*, by the number and density of associations in a given area and the scale of involvement of individuals in their activities. We can also propose a third dimension to this relationship when existing social organisations are part of the institutional backbone through which social capital is deployed.

This article aims to apply Starosta's reflections on social capital and related issues to the analysis of the condition of rural NGOs in Poland. A perspective of analysis was applied based on the two following key assumptions:

- (i) the substantive relevance of Starosta's reflections on social capital to the analysis of data collected during research on the rural third sector in Poland (Knieć, Marcysiak, Piszczek 2022)
- (ii) the dearth of publications linking Starosta's scientific attainments in the field of research on social capital and its derivatives to the analysis of the quality of civil society in the contemporary Polish countryside. As far as we are concerned, there is considerable cognitive potential resulting from linking Starosta's theories concerning social capital, its structure and function, with attempts to understand the condition of rural social organisations.

## 2. Paweł Starosta's reflections on social capital

This part of the article provides insight into the three types of interrelationships between social capital and civil society mentioned in the introduction to this paper. These are, in our opinion, Starosta's most important theoretical achievements concerning social capital. The third part of this article illustrates their practical applicability to the analysis of the collected research material on the condition of rural NGOs in Poland.

We begin with principia issues, i.e. by the way the essence of social capital is understood in Starosta's work. An extensive summary of Starosta's reflections on social capital can be found in the article *Social capital in the context of interaction*, included in *Social Problems. Persistence and variability in a dynamic reality* (Starosta 2022). Herein, Starosta draws on his recomposition of the concept of social capital, based primarily on trust, norms of reciprocity, responsibility for others along with subjectivity and interaction networks (including informal ones). Starosta proposes, "a fundamental factor in building social capital becomes the shared values and norms referred to as civic virtues" (Starosta 2022: 110), which can be reduced to norms of solidarity, tolerance and responsibility for others. Their natural *alter ego* becomes the 'stowaway' situation, where individuals and groups benefit from the altruism of others, remaining passive during the initiation and implementation stages of initiatives, and derives social, political and economic benefits if the initiatives succeed. The aforementioned 'civic virtues' enable the creation and persistence of "a system of institutions that form a specific structural context" (Starosta 2022: 110). Among them, **NGOs should be singled out in the first place.**

Particular attention was paid by Starosta **to the network component of** social capital or network social capital. In his paper titled *The network component of social capital*, published in 2013, in the monograph *Nowy ład* (English translation: *New Order*). It discussed the dynamics of social structures in modern societies (Starosta 2013). Starosta contends that in a situation of economic underdevelopment (at least in Polish conditions), social capital plays a secondary role in creating regional development prospects. This happens when the pressure of individualistic values and the promotion of competition as a norm produce life strategies that are oriented towards the attainment of material goods and doing this rather alone as maintained by Robert Putnam in his famous book *Bowling Alone* (Putnam 1995). Analysing the results of his research on the importance of social networks (Starosta 2013, 2018), Starosta concludes that this importance is significant at the micro-social scale and secondary or tertiary for meso- and macro-structures. Accordingly, for him the presence of individuals in (mainly informal) networks is critical to their life chances. In particular, the ability to situate oneself in these networks (collegial, social, family, professional, etc.), i.e. in positions that help access key information is critical. That said, the size and quality of social networks do not translate into the economic position of the counties in which they are present. It is questionable whether or not this lack of connection is a derivative of the strong dominance of informal networks (social or family), which leads to the low involvement of individuals in formal networks (civic associations, trade unions, etc.)?

Starosta observes an important and interesting relationship between the subjectivity of individuals and small local communities, on the one hand, and the level of development of social capital based on formal institutions (the *de facto* reference here is to bridging-type social capital), on the other. In general, social capital based on informal family and social relationships is not conducive to making a case for changing the world based on the structures, institutions and procedures available in a democratic system.<sup>1</sup> Conversely, social activity based on formal and semi-formal structures enables individuals and groups to go beyond the corset of familism or clannishness (Starosta 2022). However, an individual's ability to situate themselves in good quality networks almost guarantees them career success and, in turn, significantly increases the likelihood of material success (Starosta 2013: 328). Starosta's research in Poland's Łódź region in 2012 led to another interesting conclusion: the network component of social capital present there mainly involves local leaders. In Poland, as interpreted by Starosta from the data obtained, there is a situation "where, in the conditions of an underdeveloped civil society at the level of the territorial collectivity, it is not so much the networks of residents as the **networks of local leaders** that are important" (Starosta 2013: 329). This social capital, built and based largely on the activity of local leaders, seems to be a resource that

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<sup>1</sup> This was also confirmed by studies on the balance of social capital of rural inhabitants conducted by W. Goszczyński, W. Knieć and H. Czachowski in the Kujawsko-Pomorskie Voivodeship and W. Goszczyński, W. Knieć and C. Obracht-Prondzyński in the Pomorskie Voivodeship.

is solely at their disposal and only serves, as Starosta notes, the purpose of mutual empowerment of organisations instead of building capital of an associative nature. Do we have a specific type of sociological vacuum that separates the leaders and the unaffiliated 'locals'? To what extent is this phenomenon, related to the problem of 'activating the already active' and 'activating the already activated', which is faced repeatedly in research on the Polish Third Sector? (Goszczyński et al. 2013). This is an extremely interesting issue that requires further empirical exploration. In the second part of this article, we will address it based on the data collected and analysed as part of the present research.

Starosta's reflections on the **social functions of social capital** (and the lack of it) – generative, associative and creating certain types of collective order (Starosta 2022; Starosta et al. 2017) – are also interesting. The former shows the role of social capital as a form of social network asset multiplication. Accordingly, it is an element that raises the efficiency of group activities by enabling individuals and groups to do the following: (i) position themselves in value-added networks; (ii) consequently, reduce transaction costs (through, *inter alia*, 'honour contracts'); and (iii) generate constructive competition. This 'market' approach towards understanding how social capital functions results, in Starosta's view, from the fact that, for a long time, social capital has been treated as axiologically neutral, i.e. as something that can be used for all sorts of purposes, implicitly if need be – including purposes which may not be in line with the values of the society on the whole. As if in response to such a dictum, Starosta links the associative function of social capital to the identification of variables or indicators, whose existence and intensity will foster the realisation of a vision of development that is congruent with the overall values of the society. This applies primarily about building civil society, based on social capital manifested in the ability to act collectively to achieve common goals. Starosta defines this potential as a commonly shared belief, subsequently transformed into a tendency that favours **activities that favour the community**, rather than those carried out while competing for resources. As stated elsewhere (Starosta 2018), this pro-community spirit, going by Piotr Sztompka's theory concerning a culture of trust (Sztompka 2007), **is most effectively stimulated (animated) and sustained through the institutional fabric** – whether governmental, (more) local governmental or **(most likely) non-governmental**.

Finally, Starosta draws our attention to concepts of social capital whereby it is constructed from several elements, occurring in configurations, on which the balance of this capital depends, and this has a direct bearing on the type of collective order that obtains in a given community (Frykowski, Starosta 2008a). In this sense, social capital can be associative, pro-civic and pro-tolerant, but it cannot, under the right conditions, lead to amoral familism or the formation of communities that are highly integrated but hostile to their surroundings.

In Starosta's opinion, the consideration of the functions of social capital brings with it significant theoretical controversy, the discussion of which convinces him

that the ‘dark sides’ of social capital (amoral familism, clannishness and exclusivity of groups) do not constitute its essence; they are like its ‘disease mutations’. To point to their equivalence, given their associative nature, is an oversimplification.

On the other hand, as mentioned above, caution in estimating the importance of social capital in stimulating socio-economic development is recommended. For Starosta, this importance is limited, usually secondary or tertiary, because “social capital cannot and does not replace modern technologies that facilitate the satisfaction of social needs and improve the quality of life, whether they operate in a more or less integrated society” (Starosta 2022: 115). In the process, he draws, *inter alia*, on his research on the links between the strength of social networks and the level of economic development of a commune (Starosta 2013), describing this phenomenon more broadly from an international comparative perspective in articles from 2016 (Ambroziak, Starosta, Sztudynger 2016) to 2022 (Sztudynger, Ambroziak, Starosta 2022). They conclude that, first, the strength of the social networks studied in the Łódź region is not considerable: these networks are small (few, spatially limited); however, the intellectual capital present in them is quite significant. Second, the network dimension of capital does not, however, translate into the economic position of the *powiat* (county).<sup>2</sup> However, as mentioned earlier, the establishment of an individual in good quality social networks all but guarantees professional and economic success. A broader perspective, however, leads us to somewhat different conclusions – a comparative analysis based on data from 22 European countries shows that the growth of the so-called *cooperation capital* can account for as much as 1/6th to 1/8th of economic growth, as measured in GDP terms. Starosta also points to a clear relationship between types of social capital and patterns of civic participation even as he proposes an interesting, multidimensional template for a methodology to measure the quality (strength?) of social capital (Starosta, Frykowski 2008b).

To conclude, Starosta’s reflections on social capital are highly relevant for analysing the condition of contemporary rural NGOs in Poland, in particular by applying the following considerations to the analysis:

- (i) recognising the predominance of associative functions of social capital over generative ones. This concerns Starosta’s belief in the superiority of the pro-collectivist (communitarian) role of social capital (the ability and willingness to work together for the common good) as opposed to discounting it for economic (macro) or career (micro) benefits;
- (ii) accepting the importance of ‘institutional encasing’ of social capital (in the form of both governmental institutions (local and central) and social organisations, formal/semi-formal associations, etc.), through which this capital is more effectively strengthened (and animated);

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<sup>2</sup> Since 1999, the administrative division of Poland has been based on three levels: voivodeships (provinces), divided into *poviats* (counties or districts), and further into *gminas* (communes or municipalities).

- (iii) recognising the values and norms known as ‘civic virtues’ as the foundation of social capital: solidarity, cooperativism, tolerance and responsibility towards others;
- (iv) accepting the value of networking and knowledge exchange, as well as the benefits of individuals’ ability to situate themselves in these networks. This also applies to the benefits that accrue to the individuals who associate with social organisations, including those at the local level;
- (v) drawing attention to the emerging specificity of third sector social capital as ‘local leaders’ capital’, i.e. social capital built, sustained and developed by the elected members of organisations that represent community interests (which, in Poland, is more often the case).

### **3. Rural NGOs from a social capital perspective. Analysis of the results of a study on the condition of rural NGOs as perceived by their leaders<sup>3</sup>**

#### **3.1. Methodology**

In 2021, we conducted a study of rural NGOs through questionnaire-based interviews and focus groups with the leaders of these organisations. We have provided the details of the methodology in the article *Citizenship on the periphery. The condition of rural NGOs as perceived by their leaders* (Knieć, Marcysiak, Piszczek 2021). For this article, we limited ourselves to signalling a few key issues related to the methodology. We applied multistage sampling for determining the questionnaire survey respondents. Poland’s administrative divisions comprise voivodeships and poviats. We focused on rural poviats (drawing in turn voivodeships, rural poviats and NGOs). We encountered a serious problem concerning the disregard by the poviat offices for their obligation to publish a list of NGOs operating in their area. Moreover, we used the existing database at the disposal of the Forum for Rural Areas Activation (FAOW) in the draw, which included 1,120 rural NGOs. We consider a sample of 333 rural NGOs in Poland.<sup>4</sup> Our interviewees were individuals representing the drawn NGOs (usually presidents, directors, or chairpersons).

Our respondents were mostly females with secondary and higher education, who usually represented Local Action Groups (LAGs), Farmers’ Wives Associations (FWAs) or foundations. Men most often represented associations. The average duration of activity of our respondents in a given organisation was five years.

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<sup>3</sup> Project “Obywatelskie obserwatorium aktywności wsi” (English translation: Civic Observatory of Rural Activity) funded by NIW-CRSO – Civic Organisations Development Program 2018–2030 PROO under the contract PROO4/16/2020.

<sup>4</sup> The database of FAOW includes 1,120 rural NGOs from all regions and all counties (poviats) in Poland.



The qualitative part of the study consisted of focus groups, with representatives of different types of NGOs countrywide. We conducted four such interviews with a total of 37 leaders of rural organisations.

Important changes were necessitated in the planned survey methodology due to the sanitary restrictions imposed by the Polish authorities following the COVID-19 pandemic (2021). We avoided the risky and much-discussed solution of conducting the survey face-to-face (questionnaire interviews were conducted over the phone and focus groups online). We were concerned mainly about problems with refusals, the length/comprehensiveness of the questionnaire (in which we also included many (semi-) open-ended questions or the comfort/freedom of the focus interviews in the online Teams version. The risk we took proved rewarding, with the pandemic, which had been present for some time, having changed our style of working and communication very much, resulting in complete freedom to talk online or on the phone. They were so natural to our respondents that we were surprised at some of the responses when we suggested that perhaps (if the restrictions were lifted), we could meet at ‘traditional’ focus groups. There were comments such as “*Why waste time getting there?*” and “*Let’s meet online, it’s more convenient that way, and it doesn’t change anything in the conversation*”. Moreover, during these meetings, there was a kind of *savoir vivre* – quite obvious to everyone – e.g. muting microphones, not interrupting others, a special place for the interview (no third parties/interference/noise), etc. Apart from one case of a respondent temporarily ‘dropping out’ of the interview because of connection problems, we did not observe any technical disturbances (despite most of our respondents being in the countryside homes at the time). As mentioned, the limited format of this article prevented us from presenting all the details of the methodology or the demographics of our respondents. Those interested may peruse other publications produced using the study described here.

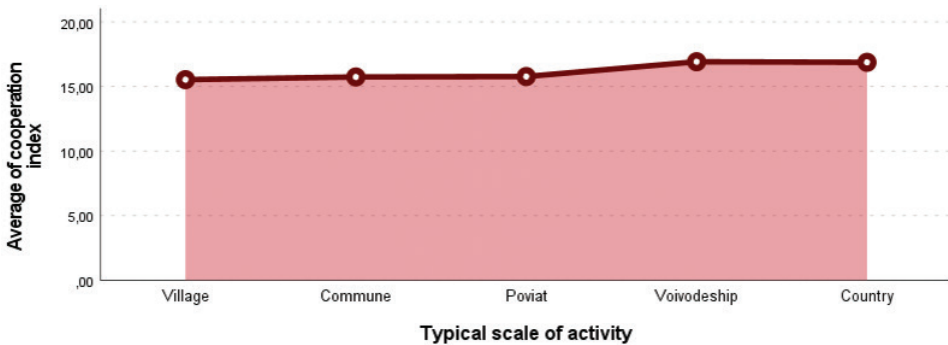
In presenting the selected analyses, we are aware of the limitations of the questionnaire design/content of the questions, and those of the focus interview. As we followed Starosta’s analysis of social capital, we came across issues that were of particular interest to us. These issues were covered in our study, and they relate to the following:

- (i) the broadly understood cooperation of NGOs with the social environment (unfortunately, we did not study the issue of trust – one of the key issues in Starosta’s capital analyses. The aspect of social trust was not addressed in the theme of the study, although we are aware of its relevance. We focused on the following aspects recognised by Starosta as being of particular importance to us: capacity building for bottom-up actions, legitimisation of non-profit activities, socialisation and cooperation);
- (ii) the condition of the leaders of the analysed NGOs (this is all the more important as, once again, Polish rural and small-town NGOs seem to be ‘leaders’); and
- (iii) leaders’ assessment of the ‘climate’ for NGO activities in Poland from a local (village, commune) and national perspective.

### 3.2. Analysis of selected data

In our survey, we inquired about cooperation with entrepreneurs, local authorities (commune authorities and commune units) and ‘supra-local’ authorities (poviat and marshal’s office), or other social organisations. The ‘cooperation rating index’ created, based on these variables, could take values from a minimum of 4 points (worst rating) to a maximum of 20 (best rating). On average, leaders awarded cooperation in the social environment 16 points, which we think is a high score.

Of interest to us was whether and to what extent the ‘cooperation’ thus defined is related to the typical field of action. It is found that, on average, it manifests itself best in rural NGOs operating on the voivodeship and national levels. The differences are small at approximately 17 points in these areas of operation, compared to 15 points at the village, commune and poviat levels.<sup>5</sup>



**Chart 1.** Averages of the ‘cooperation’ index by area of operation of the surveyed NGOs

Notably, ‘cooperation’, broken down into its components, already presents a somewhat different picture, compared to a typical NGO area. On average, each type of cooperation we studied performs slightly worse among locally active NGOs (Chart 2). Particularly outstanding here was the poor assessment of ‘cooperation with entrepreneurs’, despite the significant and systematically increasing share of entrepreneurs in the ‘most active members’ of the surveyed organisations (Knieć, Marcysiak, Piszczek 2021: 56–57). Interestingly, we recorded the lowest average rating for ‘cooperation with the commune and commune units’ among rural NGOs. In contrast, cooperation with ‘other local government units’ (at poviat and marshal’s office level), scores the lowest among NGOs operating at the commune level. ‘Cooperation with other social organisations’ received the closest and highest marks in all areas of operation. Thus, the surveyed leaders were generally highly satisfied with the cooperation of their organisation (recall that, out of a maximum of 20 points, the average score for satisfaction was 16); however, satisfaction with the cooperation of individual ‘partners’ already falls differently, depending on the declared typical area of activity.

<sup>5</sup> These are statistically significant differences for the Kruskal-Wallis H test 9.8 (4),  $p < 0.05$ .

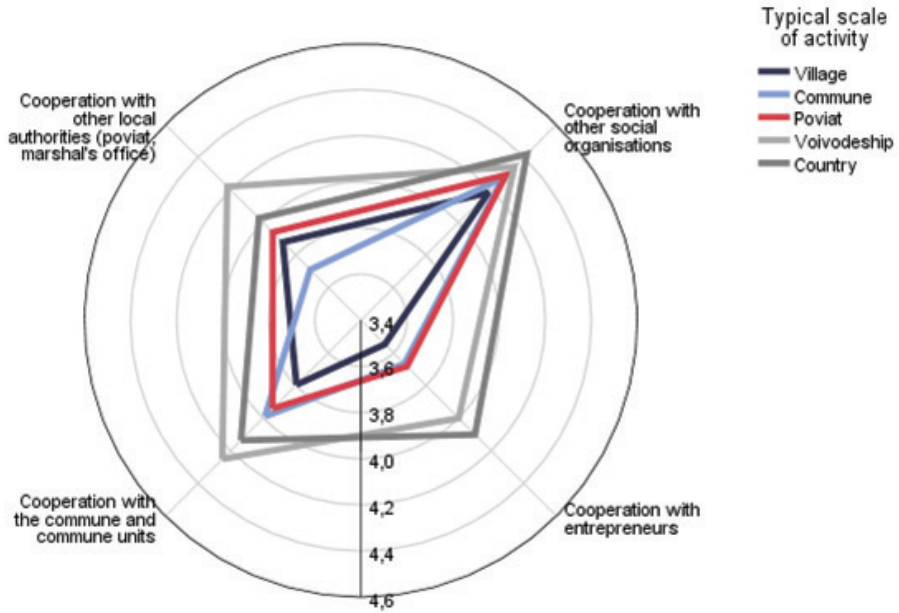


Chart 2. Mean scores for cooperation with different entities by declared area of NGO activity

Another issue of interest was the condition of the leaders (feelings about the local environment’s perception and assessment of its activities). They admit that despite feeling that they are ‘doing something good’, and ‘appreciated in their community’, they are convinced that ‘being a social activist is difficult’ (Chart 3).

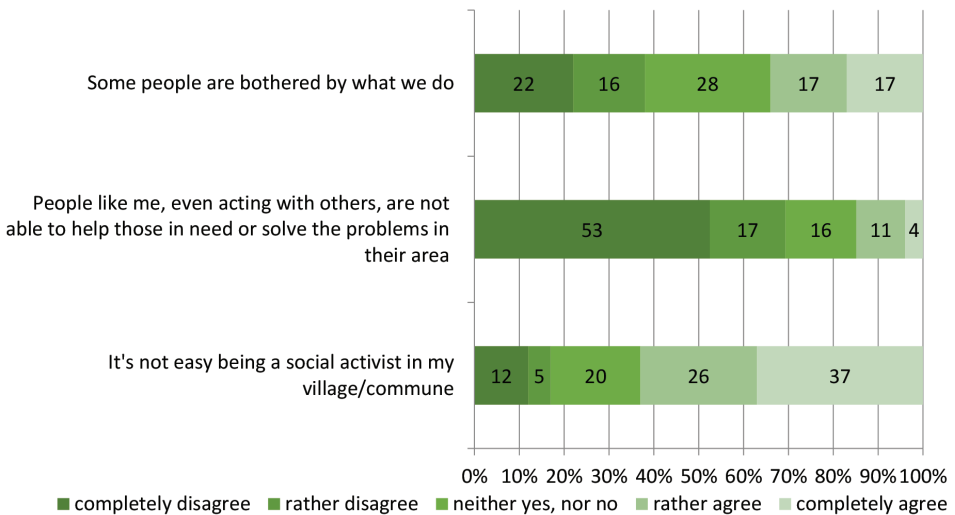


Chart 3. 'Condition' of the leader in the local environment (%)

Besides the aforesaid opinions (Chart 3), we have included others,<sup>6</sup> creating a so-called ‘sense of agency index’. Its maximum score is 35 (indicating a high sense of agency), and the minimum is 7 (very poor assessment of sense of agency). As revealed by the analyses, the average sense of agency, like the median, was 26 points. The minimum score of our respondents is 16 points and the maximum is 35. We can therefore consider this a rather positive result and the sentiment among leaders too as positive. The results of the analyses of the open-ended questions, or the statements obtained during the focus groups, contrast somewhat with these assessments. Comments on fatigue, overburdening of leaders, discouragement, the gap between the expectations of the environment and the actions taken, lack of support, etc. are highlighted. Finances, project settlement and related bureaucracy remain the most sensitive issues most negatively assessed by respondents (Knieć, Marcysiak, Piszczek 2021, 2022). In most of the studies after 1989, these issues are commonly identified as the crucial and typical problems of contemporary rural social organisations in Poland (Herbst 2008; Chrzczonowicz 2019; Charycka, Gumkowska, Bednarek 2021; Goszczyński, Knieć 2022). Besides these seemingly obvious facts, we would also like to draw attention to other somewhat less frequently mentioned issues. These relate to statements concerning the open question about the ‘biggest issues/problems’. These were answered by all respondents. Let us reiterate that the opinions cited here were not prompted by the researchers. We, therefore, treat them as reliable (strong) indicators of existing problems, particularly relevant in social capital analyses. Of course, it is difficult to make a strong statistical analysis in this case; we have, however, counted the responses (giving their percentage vis-à-vis the 333 leader comments), which we have assigned to the following types of problem points:

**Type 1:** Local community (89 indications [approximately 27%]). We deal mainly with ‘*lack of interest from the public*’, ‘*lack of activity of the residents*’ (also described as weakening, passivity, dependent on remuneration ‘*scarce financial capabilities – everything is voluntary – this does not mobilise the residents*’, ‘*lack of volunteers*’. ‘*lack of interest of younger people (in a more formalised form of cooperation*’, ‘*The society is closed; it is hard to rebuild social relations*’, ‘*Sometimes it is difficult to get people out of their homes, and then they still complain that nothing is happening*’. Particularly clear and frequent is the complaint about the inactivity of youth, ‘*Young people do not want to be socially active. She retreated into those mobile phones, the Internet. Worst of all, however, they don’t want to contribute; for them, it feels strange (to do so)*’.

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<sup>6</sup> The opinions we have considered are: ‘I feel our organisation is doing something good’ and ‘Our organisation is appreciated for what it does’ and ‘I think we will get more members’ and ‘I think social organisations like ours will develop in the future’ (part of the variables: ‘some people are bothered...’, ‘it’s not easy to be a social activist...’, ‘people like me, even...’ have been recoded for the index to make sense).

**Type 2:** Organisation's staff problems (38 indications [approximately 11%]). These are mainly related to the reluctance of people to engage. Leaders emphasise that even when an organisation looks large (formally), in practice, *'everything is done by one person, or as they say: a bricklayer, a plasterer, an acrobat. So, one runs events, raises funds and accounts for them while activating the others. In the long run, it's hard to stand like a locomotive engine that has no support'*. Leaders explicitly indicated that they are bothered about *'professional burnout of leaders', 'limited time', 'lack of support among the members of the organisation in fundraising, documentation (all work ceded to one person), including problems with division of tasks, lack of time for activities, and difficulty in getting a larger group together'*. There are also times when, for example, the illness of a leader causes the organisation to 'wither' away completely.

**Type 3:** Cooperation with commune/administration offices (33 indications [approximately 10%]). The most prominent resonance here was *'lack of cooperation with the commune', 'blocking (of) initiatives'*. Respondents stressed the importance of connections, in the absence of which it is impossible to secure funding for projects. *'We are not waiting for money to fall from the sky. We take part in competitions, but we feel that you have to be a parish to win competitions. We know we write good projects because (right) from school we have been writing and winning. (...) the same people write for the association, and we are continually refused', 'Cronyism: you have to do everything via connections, ... (even)... (for) public (interest) activities. In competitions, projects from the (centre of) decision-making... next to Poznań, also win. And the farther away they are, at the edge of the voivodeship, they are ignored'*.

**Type 4:** Cooperation with other organisations (8 indications [approximately 2%]). Leaders here principally mentioned competition for (financial) resources and lack of assistance/support from other institutions *'Local support group – we have a very bad experience with help, not even a support organisation that should be helping', 'Appears as though resources are being diverted; a lot of competition, competition with other organisations for funds, lack of tools to work with business', 'competition with the village representative'*.

The aforementioned types communicate problems concerning both the 'condition of the leader' and their (even more than the leader's organisation), skills and ability to cooperate. We, therefore, tested whether these two issues somehow coexist, using the already mentioned 'sense of agency index'<sup>7</sup> and the 'cooperation index'. The relationship between these variables was found to be statistically significant, but not very strong. Leaders with a higher sense of agency assign a better rating for an NGO's 'cooperation', while those with a lower sense of agency offer a worse rating.<sup>8</sup>

<sup>7</sup> The following variables were applied to constitute this index: 'People like me, even acting with others, are unable to help those in need or solve the problems in their area', 'I feel our organisation is doing something good', 'Some people are bothered by what we do;', 'Our organisation is appreciated for it does', 'I think we will get more members', 'It's not easy being a social activist in my village/commune'.

<sup>8</sup> Spearman's  $\rho$  0.2,  $p < 0.01$

Generally, the surveyed leaders are convinced of their (the respective NGO's) positive impact on the activity of the inhabitants (confirmed by 75% of respondents, including 35% who even describe it as very positive). If we juxtapose this issue with the assessment by the NGO leaders of the 'activity-inactivity' atmosphere characterising the localities in which they are active, we find that the higher the activity of the inhabitants, the more positive the impact of the NGO is assessed to be (this is not a strong relationship, but statistically significant<sup>9</sup>). Further, a statistically significant correlation was obtained when examining the impact on residents' activity vis-à-vis their (residents') '(non)compliance- quarrelsomeness'. However, it is weaker than 'activity-passivity'.<sup>10</sup> That is to say, the more 'quarrelsome, discordant' the environments in which the NGOs in question operate, the weaker their impact on resident activism is judged by their leaders-to-be.

The environment in which NGOs operate is, of course, not only local authorities or the local community; it is also the 'environment' created by state policy, understood as legal regulations, administrative support, or simply as the state's attitude towards NGOs. In Tables 1, 2, and 3 below, we have juxtaposed selected issues/opinions/assessments of various (often already mentioned in this article) issues related to NGO activities, with an assessment of the 'climate' for conducting social activities in a commune, or in Poland in general. The numerical values in the table cells are calculated using Spearman's  $\rho$ . We have noted statistically significant correlations in these locations and have ranked them in descending order of the points scored in the 'climate in the commune' column.

**Table 1.** Assessment of 'climate' for NGO activity in the commune and in Poland vs. assessment of selected aspects of rural and small-town NGOs

Evaluation of the NGO's selected aspects as perceived by its leader  (From 1 point [Very negative] to 5 points [Very positive])	Better climate for social activities in the commune  (From 1 point [change is not important, irrelevant] to 5 points [change is absolutely necessary])	Better climate for social activities in Poland in general  (From 1 point [change is not important, irrelevant] to 5 points [change is absolutely necessary])
1	2	3
Cooperation with the commune and commune units	-0.4	-0.17
Cooperation with other local authorities (poviat, marshal's office)	-0.2	Irrelevant
Influence on the activities of the villagers	-0.2	Irrelevant

<sup>9</sup> Spearman's  $\rho$  0.23,  $p < 0.01$

<sup>10</sup> Spearman's  $\rho$  0.12,  $p < 0.05$

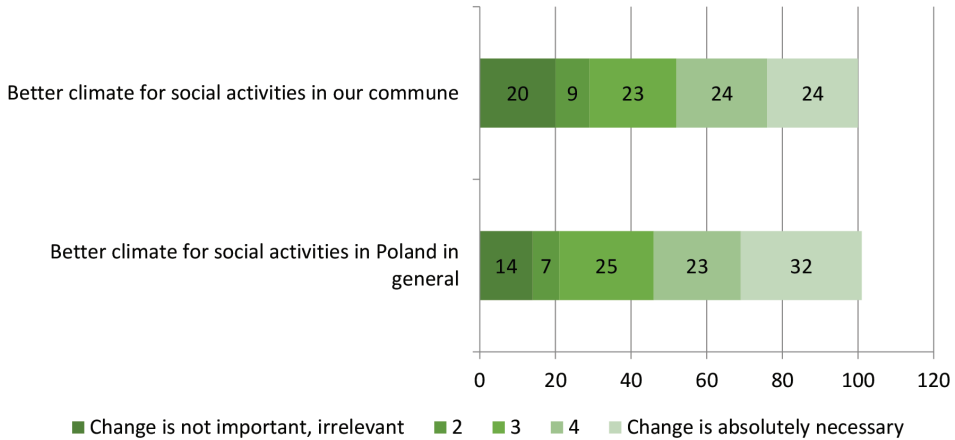
**Table 1** (cont.)

1	2	3
Cooperation with other social organisations	-0.16	Irrelevant
Cooperation with entrepreneurs	-0.16	Irrelevant
Fundraising for the organisation	-0.16	Irrelevant
Attracting new members	-0.15	Irrelevant
Financial situation of the organisation	-0.15	Irrelevant
State attitude towards NGOs	Irrelevant	-0.3
Dealing with 'bureaucracy' in running the organisation	Irrelevant	Irrelevant

**Table 2.** Assessment of the 'climate' for NGO activity in the commune and in Poland vs. opinion on selected aspects of rural and small-town NGOs

NGO leader's opinions about selected aspects of their organisation's performance  (From 1 point [Completely disagree] to 5 points [Completely agree])	Better climate for social activities in the commune  (From 1 point [Change is not important, irrelevant] to 5 points [Change is absolutely necessary])	Better climate for social activities in Poland in general  (From 1 point [Change is not important, irrelevant] to 5 points [Change is absolutely necessary])
It's not easy being a social activist in my village/commune	0.25	Irrelevant
Some people are bothered by what we do	0.2	Irrelevant
The organisation is appreciated for what it does	-0.15	Irrelevant
Social organisations like the one we are a part of will develop in the future	0.14	Irrelevant
The organisation is doing something good	0.11	0.23
People like me, even acting with others, are <b>not able to help</b> those in need or solve the problems in their area	Irrelevant	Irrelevant
The organisation will get more members	Irrelevant	Irrelevant

It is clear that the ‘local climate for action’ is more important (and statistically significant) for the functioning of rural NGOs than the ‘national climate’. Incidentally, we should add that the ‘action climate’ both in the commune and in Poland is not rated the best (Chart 4).



**Chart 4.** Assessment of the necessity of a change of climate concerning the operation of surveyed NGOs in the commune and Poland in general (%)

The ‘local climate’ correlates most strongly with the assessment of cooperation at the commune, poviát and voivodeship levels alike; the stronger the opinion that the climate for activity in the commune needs to change (for the better), the worse is the assessment of cooperation with local government units/offices. It can also be observed that the more this change in the local climate (for the better) is necessary (according to the leader), the worse is the evaluation of the impact of his/her/their organisation on the activity of the villagers. The more the need felt for such change, the more the leaders agree that people are not happy with their work, and the more they think it is not easy to be a social activist.

**Table 3.** Assessment of the ‘climate’ for NGO activity in the commune and in Poland vs. assessment of ‘cooperation’ and ‘sense of agency’

Indexes	Better climate for social activities in our commune	Better climate for social activities in Poland in general
Index of cooperation	-0.33	Irrelevant
Sense of agency index	-0.15	Irrelevant

In conclusion, we revert to the ‘cooperation’ and ‘sense of agency’ indices. Again, it can be seen that ‘local climate’ is crucial for the rural NGOs’ activities, with a stronger correlation with ‘cooperation’ than ‘sense of agency’ (Table 3).



This is because even when unfavourable conditions for national action arise, rural NGOs can cope by mobilising not only ‘formal’ resources but also ‘informal’ ones because, as the data shows, they usually do not have large budgets, and their scope of action is local. They are, hence, able to adapt, or to use a biological term, to form into an ‘endospore’. This does not mean, of course, that the policy of a government is indifferent to rural NGO leaders. What is evident from the statements of these NGO leaders is their fear of centralisation and their general lack of trust in NGOs on the part of the powers that be.

This is best described by the following statements of the interviewees: *‘We are being treated like thieves’, ‘There are two perspectives from which I observe this. The first is the local perspective, i.e. the commune and the powiat, and here I have to say that I can’t particularly complain. The old rule of thumb is that if you can’t help, at least don’t make it harder, and somehow that’s the climate in which things are going on here. The broader, national perspective, on the other hand, seems to me to be a little worse because there is a very visible attempt to centralise decisions, which is reminiscent of time passed. We have developed a certain self-government model in Poland, which consists of giving decision-making powers as low as possible, including in the areas of operations of NGOs. Now, there is an increasing move towards centralisation, where only a legitimate and competent Areopagus (a council of elders) of different people will make decisions for me – although I hope it won’t come to that’.*


In summary, the optics proposed in Paweł Starosta’s work for perceiving the structure and function of social capital have worked very well in analysing the condition of the rural Third Sector in Poland. Firstly, by using it, we have shown the importance of the associative nature of social capital for the smooth operation of NGOs. Relationships between social organisations and their surroundings – those further afield and those closer to them – do not always prove sustainable and important; so, a significant proportion of organisations has a minimal reach and scale of impact (a single village, 1–2 initiatives per year). This also brought up the subject of the difficult cooperation between NGOs and local authorities, which one respondent put simply as follows: *‘They help because they don’t make it harder’.* Secondly, we empirically confirmed the conclusions of Starosta’s research on the ‘leadership type of social capital’ in Poland. The leaders of the organisations we studied see this model more as an institutional threat and individual burden than as a desirable and functional direction for the activities of ‘their’ associations. Ultimately, we revealed a kind of split ego of local leaders balancing a high sense of agency and satisfaction with implemented activities and a relatively unfavourable climate for social action in the Polish countryside.

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## CIVIC PARTICIPATION IN PAWEŁ STAROSTA'S RESEARCH

**Abstract.** Research on the condition of democracy in post-socialist countries focuses primarily on issues of civic participation. This article, which provides an analytical overview, presents civic participation in light of the achievements of Professor Paweł Starosta. The text has the character of an analytical overview study. Particular attention is focused on the social context, the aims and directions of the research, the definition and determinants of public participation, and the main results of the observations made by Starosta. Starosta's contribution, visible in the analysed works, extends the perception of public participation beyond the behavioural dimension and constructs theoretical concepts to explain political involvement based on the criterion of subjectivity. It also distinguishes ideal types of political involvement at the local level. In conclusion, Starosta's research has considerable application potential in the context of the methods used to measure and explain participation at the local level. The comparative value may be particularly useful for researchers of local systems, especially rural systems (rural studies), who come from various scientific disciplines, including political sociology, rural or urban sociology, and socio-political geography.

**Keywords:** active citizenship, local civic participation, alienation, empowerment, rural areas, post-industrial cities, Central and Eastern Europe.

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## PARTYCYPACJA OBYWATELSKA W BADANIACH PAWŁA STAROSTY

**Abstrakt.** Badania dotyczące kondycji demokracji w krajach posocjalistycznych przede wszystkim skupiają się na kwestiach aktywności obywatelskiej. Celem artykułu jest zaprezentowanie zagadnienia uczestnictwa obywatelskiego w dorobku publikacyjnym profesora Pawła Starosty. Tekst ma charakter studium przeglądownego. Szczególną uwagę skoncentrowano na kontekście społecznym, celach i kierunkach badań, definiowaniu i determinantach partycypacji publicznej oraz na głównych wynikach obserwacji prowadzonych przez Pawła Starostę. Widoczny w analizowanych pracach wkład w naukę prof. Pawła Starosty polega na rozszerzeniu postrzegania partycypacji publicznej poza wymiar behawioralny oraz skonstruowaniu koncepcji teoretycznych tłumaczących zaangażowanie polityczne według kryterium podmiotowości, a także wyodrębnieniu idealnych typów zaangażowania politycznego na poziomie lokalnym. Podsumowując, uzasadniony wydaje się wniosek o znacznym potencjale aplikacyjnym prac badawczych Pawła Starosty, zarówno w kontekście stosowanych metod pomiaru, jak i wyjaśniania zjawisk partycypacji na poziomie lokalnym. Szczególnie duża w tym zakresie może być wartość porównawcza dla badaczy układów lokalnych, zwłaszcza wiejskich (tzw. rural studies), reprezentujących różne dyscypliny naukowe, w tym np. socjologię polityki, socjologię wsi lub miasta, geografę społeczno-polityczną.

**Słowa kluczowe:** aktywność obywatelska, lokalna partycypacja publiczna, alienacja, podmiotowość, obszary wiejskie, miasta przemysłowe, Centralna i Wschodnia Europa.

### 1. Introductory issues

Participation in wider social life has long been regarded as an intrinsic element of democracy and deserves special attention. Axiologically, it is as positively valued as other democratic virtues, e.g., subsidiarity, self-governance, or representation. It is understood mainly as a means of controlling the authorities (influencing them, appointing them, and relieving them of excessive responsibilities). More figuratively, the concept was defined by Arnstein (2012: 13), who mentioned the need to redistribute power: "Civic participation is synonymous with civic power. It is the redistribution of power to include people currently excluded from political and economic processes. Public participation is close to political participation, or, in other words, political society, although these are not fully identical concepts". Kaźmierczak (2011: 84) noted that the term public participation is absent in the Polish literature, and the terms civic participation or social participation are used instead.

The extensive bibliography of works, both theoretical and empirical, mainly refers to the advantages and limitations of participation, comparative studies, historical analyses, or case studies. According to Dahl's (1995) concept of procedural minima, regular and fairly held elections are necessary for democracy to exist. Peisert (2011: 157) stated, "It has become established that elections are the essence and the heart of democracy." However, electoral procedures do not immediately imply the existence, or permanence, of democracy. A natural consequence of the persistence of a political system is the legitimisation of power. In classical concepts

of the legitimisation of power (see, e.g., Beetham 2001), participation is an immanent feature of legitimised power. Modern democracy cannot exist without the activity of citizens (e.g., Dahl 1995; Sartori 1998; Cześniak 2007), and the extent of their freedom of political involvement is determined by the existence of the democratic system in a given country. Interest in political participation thus corresponds to changes in the socio-political environment, particularly if the changes are accompanied by significant expectations and hopes regarding them, including the possibility of the real political influence of citizens on the decisions of those in power. Citizen control, considered a pillar of trust, also plays an important role. Through their own actions, citizens try to control who holds public office and influence what the government does. As Etzoni (2012: 24) wrote, being active is equivalent to having control, while being passive is equivalent to being controlled. Controlling what is happening is determined by the extent of 'one's knowledge and awareness, the purpose of 'one's actions, and the instruments or means of exerting pressure.

The importance of political participation also cannot be stressed enough from the perspective of how local communities function. By involving residents (and their organisations), their responsibilities increase, and local authorities are more responsive to their needs and more effective in providing public services. Political participation provides a mechanism through which citizens can communicate their interests, preferences, and needs, and generalise pressure for an expected response. Otherwise, there is a risk of a lack of trust in the government and its activities, which often results in the alienation of citizens from public life.

When addressing the issue of civic engagement in politics in the 1970s, political scientists focused on direct citizen action to influence government decisions. Analyses focused on the election of political leaders, the acceptance of their practices and, above all, on electoral participation. Voter turnout was one of the most widely used measures (Verba, Nie 1972; Brady 1999; Almond, Verba 1963). This viewpoint was determined at the time by the commonly accepted definition of political participation, which was reduced to legitimate civic activities that were directed toward the election of those in power and the actions they implemented (Verba, Nie, Kim 1978).

Citizen participation beyond the sphere of influencing those in power was initially not addressed in public discourse. Over time, however, the research focus has broadened to include citizen activism (directed against political actors), such as demonstrations, strikes, or boycotts (Teorell et al. 2007; Norris 2002). It has also begun to look for explanations of the activity of 'ordinary citizens' rather than political elites, which is directed at influencing the outcome and effects of policy in society (Brady 1999; Teorell et al., 2007).

Research on political participation has also been conducted in Poland. Initially, as in Western countries, it focused on electoral participation. However, due to the peculiarities of how the socialist system was organised (ideological entanglement) in postwar Poland, it was quite limited. Cześniak (2007: 42) suggests that "it is difficult

to treat participation in elections held in the PRL (Polish People's Republic) as a phenomenon of the same kind as voting in free elections (although sometimes the patterns of citizens' voting behaviour seem surprisingly similar)". Markowski (2000) and Cześnik (2007) also draw attention to the relative freedom in addressing the issue of citizens' political activity among sociologists (as opposed to political scientists), which resulted in a relatively large output of studies in this area.

Cześnik even wrote about the socialisation of Polish reflection on political issues, which, in his opinion, is ongoing (2007: 43). He also mentions several studies written at the turn of the 20th and 21st centuries (e.g., Markowski 1992, 1993; Raciborski 1997; Cichosz et al. 2001; Cześnik 2002; Skarżyńska 2005), which analysed voter participation, pointing to the great similarity of Polish patterns to those observed in Western European societies. The interest of sociologists in this issue was also noticed by geographers (e.g., Rykiel, Śleszyński 2018), who appreciated Starosta's (1993) research on electoral orientations in the late 1980s and early 1990s. This period was particularly interesting for researchers interested in political participation in Poland because of the change in the country's political system and the potential increase in the democratisation of the state. The 1980s in Poland were characterised by a crisis of legitimacy in the sociopolitical system of society, which coexisted with an increase in political powerlessness (Jasińska-Kania 1989). The systemic change brought hope for a change in these attitudes.

The preparation of this paper was inspired by the 50th anniversary (which falls in 2023) of the professional work of Professor Paweł Starosta at the University of Łódź, a sociologist, researcher, academic teacher, and university life organiser. As a researcher of local communities, he did not ignore the analysis of the local political scene, although this area is not the main focus of his scientific interests. He did dedicate some of his research to political participation in the villages and towns of the present Łódzkie Region, however. Although these issues were the central focus of sociopolitical research on local communities, among researchers of the time, apart from the work of Wiatr et al. (1958, 1980, 1983), Narojek (1967), and Gostkowski (1961), they did not receive much attention in Poland (after Falecki, Starosta 1987: 93). For this reason, a sociologist's research perspective is a valuable contribution to the issue of political participation at the local level.

The purpose of this review is to present civic participation in the publications of Professor Paweł Starosta. In the Polish literature, various terms are used to describe citizen participation in public life, e.g., involvement, participation, and civic activity. The most popular of these is participation, understood as the direct participation of citizens (to a greater or smaller extent) in social, public, and political aspects (Maźnica 2013). In this article, we use the category of civic participation, understood as involvement in the public sphere (civic participation). We are prompted to do so primarily by considering the subjective role of citizens in political activism. This concept goes beyond a narrow understanding of citizens' electoral activity. At the same time, it does not include civil disobedience or activity that threatens the common good.

The research began with a thorough analysis of Starosta's scientific output. The publications included 96 single-author and multi-author works in journals and collective studies, and four monographs (two single-author and two co-authored). The criterion for selecting the sample of items for the survey was the keyword: participation. In addition, it was decided to deliberately select two 'authors' monographs in which Paweł Starosta devoted a chapter to participation or in which participation was an important variable in his deliberations. As a result, seven academic publications were analysed (see Table 1). Finally, the analytical categories were distinguished: the social context and the objectives of Starosta's research, the construction of the variable and the determinants of participation, and the main results of his research. They also constitute the structure of this article.

## **2. The socio-political context and objectives of the research**

The deep socio-political crisis of the PRL and the public's dissatisfaction with the central political authorities constituted the research context of Starosta's first works that referred to political participation. The lifting of martial law, the expansion of the national councils' authority and power, and the modification of the electoral laws for local representatives all contributed to the unique political situation in which Polish society found itself in the 1980s. The change in legislation aimed to strengthen the importance of local government and increase the participation of various population groups in forming these bodies. These things posed new research and interpretative challenges for researchers such as Starosta. Initially, research into political participation aimed to verify common judgements and statements about electoral law and elections and, more specifically, to establish the structure and correlates (Falecki, Starosta 1987).

Starosta's (1993) subsequent research was conducted in the country's new political system. Therefore, it probably aimed to answer questions about changes in the internal structure, the correlates of electoral orientations, and the motivations for participating in elections. Therefore, the two studies mentioned above did not directly refer to the concept of participation but attitudes towards it. The focus of these attitudes was electoral law, which is, therefore, an issue directly related to political participation.

In the 1990s, the involvement of residents in the local affairs of "young democracies" was treated as a significant and exceptionally important research subject. One area of interest, although no longer the only one, was local electoral activity. In 1995, Starosta produced an extensive monographic study that compared macrosocial order models with data that characterised the territorial communities he studied. He devoted one chapter to political participation and set it in the context of local participation. The purpose of the chapter was to compare model assumptions with data on patterns of political participation (1995: 12).



**Table 1.** Basic information about the material analysed

<b>Title of publication</b>	<b>Year of research</b>	<b>Purpose of research</b>	<b>Research sample and area</b>	<b>Research method</b>
1	2	3	4	5
Citizens' attitudes in elections to national councils (Postawy obywateli w wyborach do rad narodowych)	1984	To verify common judgements and statements regarding the law and elections	Łódź – quota selection from employee lists, small and medium towns – selection of quotas from electoral lists, villages – random selection. Total N = 625, Area: the then Łódzkie Voivodship	Lodz – survey; Small and medium towns – postal questionnaire survey Villages – questionnaire and questionnaire-based interviews and open-ended interviews (40)
The attitude of the inhabitants of the rural areas and small towns toward local government elections in 1984, 1988 and 1990 (Dynamika orientacji wyborczych mieszkańców wsi i małych miast w wyborach lokalnych)	1984, 1988, 1990	To show the change in the internal structure of voter orientations and their correlates in rural and small towns of Poland in the 1984, 1988, and 1990 local elections.	A representative sample of selected localities in central Poland in 1984 (N = 625), in 1988 (N = 878), and in 1990 (N = 370), as well as GUS (Statistics Poland) data. Area: the then Łódzkie Voivodship	Questionnaire interviews
Beyond the metropolis (Poza metropolią)	1984, 1988 <sup>a</sup> , 1990 <sup>b</sup>	To compare macro-social order models with data that characterise the territorial communities studied (including political participation)	Lottery from electoral lists in 1984 (N = 531), in 1988 (N = 861), in 1990 (N = 370). Area: the then Łódzkie Voivodship	Questionnaire interviews

1	2	3	4	5
Political participation of rural and small-town residents in Bulgaria, Canada, Poland and Russia (Zaangażowanie polityczne mieszkańców wiejskich i małomiasteczkowych społeczności lokalnych w Bułgarii, Kanadzie, Polsce i Rosji)	1996–1997 <sup>c</sup>	To determine the level, forms, and determinants of the political activity of the inhabitants of selected rural and small-town local communities in Bulgaria, Canada, Poland, and Russia	A representative sample of the population of the villages and towns surveyed. Study area: Bulgaria, Canada, Poland, Russia 12 villages N = 1946	Questionnaire interviews
The Political Participation of Rural Population in Central Poland (Zakres i uwarunkowania partycypacji politycznej w wiejskich gminach centralnej Polski)	2006	To identify the level and dominant components of political participation, the patterns of relationships between them, and the determinants of their occurrence.	Representative inhabitants (N = 977) Study area: rural and urban-rural municipalities in the Łódzkie Voivodeship	Questionnaire interviews
Civic participation in rural Europe	2008 <sup>d</sup>	To identify models and levels of civic participation of the rural population in Europe	Data relating to the sample of N = 14,509 respondents, who declared that they live in rural areas in 21 European countries	Questionnaire interviews
The social potential of the resurgence of post-industrial cities (Społeczny potencjał odrodzenia miast przemysłowych)	2011–2014 <sup>e</sup>	To identify the level and conditions (e.g., subjectivity mobilisation) of social potential for revitalisation.	Representative sample, N = 400 (Panevezys, Lithuania), N = 700 (Lodz, Poland), N = 400 (Miskolc, Hungary), N = 430 (Adapazari, Turkey), N = 437 (Ivanovo, Russia)	Questionnaire interviews

<sup>a</sup> Conclusions for publication based on, among other things, the research programme CPBP 09.8 “Local development – local government”, coordinators Prof. dr. hab. Antoni Kukliński and Prof. dr. hab. Bohdan Jałowiecki.

<sup>b</sup> Starosta only mentions that this year he conducted his own research in the area of Poddębice, Grabica and Głowno (Starosta 1995: 201).

<sup>c</sup> A project entitled “Patterns of social participation and social structure in territorial communities”.

<sup>d</sup> Based on the fourth round of the European Social Survey.

<sup>e</sup> Based on the project “Revival of post-industrial peripheral cities” UMO-2011/01/B/HS6/02538; awarding/funding body: National Science Centre. Source: own work.

Another paper identified the level and dominant components of political participation, the patterns of relationships between them, and the determinants of their occurrence (Starosta 2012). The possibility of including two new indicators in the analyses (Poland's referendum for accession to the European Union (EU) and elections to the European Parliament) appeared thanks to Poland's accession to the EU in 2004. It provided opportunities for comparisons with countries belonging to the community.

The end of the 1990s and the early 2000s was a period when research questions were repeatedly posed in the literature on the significance of the impact of democratic traditions on the development of civil society and the impact of the socialist period on types of civic attitudes. Therefore, subsequent research aimed to identify the patterns and level of civic participation of the rural population in selected countries (Starosta 2002, 2010). This is an innovative approach, as comparative studies on this issue usually focus only on whole countries and not rural communities. Rural sociology often focuses on case studies rather than, as in this study, a database of international survey data. The accession to the EU of former Eastern Bloc countries with significant rural populations increases interest in civic activity, including political activity, of precisely this group of voters.

The last analysed work (Starosta 2016) identifies the determinants of urban regeneration in post-industrial European cities. Participation was an explanatory variable in this research, which took a different perspective on the issue from the previous studies.

### **3. Participation – determinants and construction of the variable**

In examining orientations and attitudes about election law, Starosta drew on Stefan Nowak's (1973) definition of attitude, which is understood as dispositions or inclinations to judge some emotional object, to react to it, beliefs about its nature and properties, and certain dispositions to behave towards this object. There is no definition of political partisanship in either of the two articles that deal with this issue, although such a reference can be interpreted indirectly through the sub-variables of the behavioural dimension of attitude. Starosta's first academic publication (Falecki, Starosta 1984) lacks precision in this respect, although it contains a general description of the construction of indicators. The synthetic index of attitudes towards the electoral law was created by summing up the sub-variables, as many as twenty. However, as the authors note, only a few are readily discernible to the reader. These variables comprise the evaluative component (the perception of the ordinance as being new and different from the previous one; the perception that it enables the election of councillors in line with the expectations of the majority of the population) and the behavioural component (personally checking one's name on the electoral register; participation in pre-election meetings with councillor candidates; participation in voting).

Starosta (1993) described in more detail the attitudes toward electoral legislation used for the 1984, 1988, and 1990 comparative studies. He used an indicator of information and knowledge about the electoral law and elections (the subindexes were degree of knowledge of the electoral law, knowledge of whether a candidate's place on the ballot paper affects their chance of being elected, knowledge of the name of a certain council candidate), and an indicator of voting behaviour (personally checking one's name on the electoral register, attending pre-election meetings with council candidates, and participating in voting).

A definition of participation only appears in his monograph. It was defined as "the collective and individual actions of residents to create local power and exert pressure on the functioning of local power structures" (Starosta 1995: 198).

Starosta's texts are based on the work of Verba, Scholzman, and Brande, who defined participation as "an activity whose purpose or effect is to influence political institutions directly, through the development or implementation of public policy, or indirectly, through the selection of those who make those policies" (Starosta 2006: 294, quoting Verba et al. 1995: 3). Starosta (2002 and 2006) uses the same index of local political participation, taking into account three aspects: the electoral aspect of participation,<sup>1</sup> the campaign aspect,<sup>2</sup> and the communal aspect.<sup>3</sup>

Starosta and Stanek (2002) stated that attention should be paid not only to the behavioural aspect but also to the psychological attitude of individuals to the local political scene, i.e., alienation or subjectivity. He understands the concept of alienation<sup>4</sup> as a negative phenomenon, indicative of low civic competence and a threat to democracy: "Its source may be the individual's lack of acceptance of the rules of the local political scene, self-awareness of low competence to understand political processes, and a negative attitude towards functioning local authority structures" (Starosta, Stanek 2002: 27). Civic inactivity is therefore a result not only of the individual's attitude towards democracy but also of the functioning of the ruling elites.

However, Starosta did not just stop at determining whether the respondent engaged in a particular type of participation. He also distinguished four types of political engagement, taking into account the alienation aspect of citizens. A high level of alienation with a low level of participation meant that citizens were disengaged

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<sup>1</sup> Participation in elections to the European Parliament, the referendum on Poland's accession to the EU, and the frequency of participation in local, presidential, and parliamentary elections.

<sup>2</sup> Persuading others to vote for a particular candidate for local elections; the frequency of persuading others in presidential or parliamentary elections, and the frequency of doing work for a particular candidate or party during an election campaign.

<sup>3</sup> Attending meetings with a candidate for councillor, with the municipal council, or reporting to a councillor on a matter concerning your place of residence within the last 3 years.

<sup>4</sup> He used scale to construct a synthetic index of local alienation (Campbell et al. 1954): 1) "People like me have no say in what the local government does"; 2) "Local politics is so complicated that people like me cannot understand what it is all about"; 3) "Local politicians don't care what people like me think"; 4) "Acquaintances and bribes are the best ways to get things done in the offices and institutions of our municipality (city)"; 5) "Every inhabitant of our municipality (city) can nominate a candidate for the municipal (city) council elections".

from sociopolitical life. Meanwhile, the type of mobilisation of involvement was characterised by a high level of political alienation and a high level of participation due to external stimulation to act. According to Starosta and Stanek (2002), the most favourable type of engagement for the development of a democratic system was the subjectivist type, which is distinguished by a high level of participation and a high sense of empowerment.

**Table 2.** Types of political engagement at the local level

		Alienation	
		High	Low
Participation	High	Mobilisation commitment	Subjective engagement
	Low	Disengagement	Contesting engagement

Source: (Starosta, Stanek 2002: 118)

We can also find issues of political engagement in the monograph *The Social Potential of Urban Revival* (Starosta 2016), in Chapter 4, on the sense of subjectivity, and Chapter 9, on social mobilisation<sup>5</sup> in the consciousness of residents. Here, empowerment is understood as the ability to autonomously create social reality in a specific local context (Starosta 2016: 94). The index of subjectivity used included the following items: residents' interest in the public sphere,<sup>6</sup> local political alienation,<sup>7</sup> local public participation,<sup>8</sup> a sense of influence on the functioning of local authorities,<sup>9</sup> and self-assessment of public competence.<sup>10</sup>

<sup>5</sup> The electoral mobilisation index is concerned with R's persuasion of others in local, parliamentary, and/or presidential elections and R's persuasion to vote in local, parliamentary, and/or presidential elections. The non-election mobilisation index, on the other hand, includes items such as encouraging R to participate in local activities and local consultations, sign petitions, or attend rallies.

<sup>6</sup> The first item of the scale formed by the index of interest in local affairs consists of residents' interest in local affairs, interest in local authority plans and decisions, and the number of sources of information on local affairs.

<sup>7</sup> It uses respondents' opinions to construct an index of local political alienation for three statements: 1) "Local politicians do not care what people like me think"; 2) "Acquaintances and bribes are the best way to get things done in the offices and institutions of our city"; 3) "City authorities do not inform residents sufficiently about their plans and intentions in city politics".

<sup>8</sup> The Index of Public Participation in the surveyed cities comprised the following items: organizing action groups to solve social problems; contacting a local politician to deal with a public issue; participating in local consultations; taking part in collective local actions and campaigns; reporting local problems to the relevant services; donating money to local initiatives; informing the mass media about local problems; providing advice in solving a local problem; performing unpaid work for the city; participating in local elections; participating in a local election campaign; attending a city council meeting.

<sup>9</sup> The sense of influence over the functioning of local authorities was analysed by respondents' references to the question: "People like me have no influence on what local authorities do".

<sup>10</sup> The self-assessment of public competence is understood in three dimensions: the ability to understand political processes and phenomena, the ability to speak up in public situations, and the knowledge of local institutions to go to for help in cases of job loss, threat of crime, and domestic violence.

In another study (Starosta 2010), there are direct references to civic participation. He defined it in the same way as Pattie, Seid, and Whiteley (2003), as an action performed by citizens in public, political, and associative spheres. Starosta, therefore, made a deliberate selection of the above variables, taking primarily the behavioural aspect and ignoring the mental sphere. He also recognised that the selected set of questions was not exhaustive, considering it sufficient out of necessity. He used a ready-made ESS (European Social Survey) database (Starosta 2010). As a result of his empirical analyses (factor analysis), he distinguished four main patterns of civic participation: campaign participation (taking part in a demonstration, signing a petition, boycotting a product, displaying a candidate's badge), party participation, association participation, i.e., volunteer participation (voluntary work for an association or other people, contact with a politician), and voting participation (joining a trade union, voting in parliamentary elections) (Starosta 2010).

In almost every work analysed, Starosta looked for determinants to explain a certain state. To study the level of participation, he most often used personality or group maladjustment theory, stratification or status theory (SEJM Socio-Economic Status-Model), socialisation or civic theory (CVM Civic Voluntarism Model), and communal theory. In many of his works, stratification theory was crucial in explaining the phenomena analysed. This is consistent with the results of Inglehart and Baker (2000) and Curtis, Baer, and Grabb (1992), who found that GDP per capita is positively correlated with greater community involvement. Thus, it is not enough to teach civic-minded attitudes. One must strive to improve citizens' economic and social position. However, Starosta's research showed that other factors also mattered. For example, he (1995) found that a municipality's environmental factors (e.g., size of residence) differentiated participation more than status factors.

Starosta is well-recognised in the scientific community as a social capital researcher. However, in the publications he analysed, he used this variable in only one case (Starosta 2010). He demonstrated that in European rural areas, the social capital model had the greatest explanatory power for variation in civic participation. Activism was more related to the presence of network capital than social trust. Less important were the socioeconomic status model or the attachment model, understood as an emotional connection to a particular group. In addition, especially in earlier works (Starosta 1984, 1993, 1995), he used motivation as an explanatory variable. He understood it "as a more or less realised reason for realising electoral behaviour" (Starosta after Reykowski 1983). He made the motives for participating in elections the subject of his research interest, taking inspiration from Riesman et al. (1971), who presented a distinction between inwardly, outwardly, and tradition-driven men.

#### 4. Research conclusions: What do we learn about participation from Starosta's research?

This review of selected publications not only provides knowledge about the trajectory of Starosta's research interests, but also reflects on the context of socio-political changes that took place in Poland at the turn of the millennium. The picture of the political activity of the residents of Poland's central region that emerges from the research reveals a low level of involvement of local collectives, which corresponds to negative attitudes towards participation in local elections. The observed ritualistic, conformist, individualistic, and often cognitively devoid behaviour of residents can certainly be disappointing, especially in the context of the promises brought by the democratic changes in Poland's political system. Despite expectations that systemic changes would enable participation in elections and increase interest in political procedures, participation in this public sphere between 1984 and 1990 was relatively low – from election to election, turnout declined (1984 – 75%, 1988 – 55%, 1990 – 42%).

As Starosta (1993: 88) concluded, “paradoxically, the growth of democratic procedures in elections was accompanied by an increase in sociopolitical passivity and apathy in Poland.” He sought an explanation mainly in the internal divisions of Solidarity, the loss of the organisation's sociopolitical strength in the late 1990s, and its inability to formulate a programme of interest at the local level. He confirmed the dominance of incoherent attitudes,<sup>11</sup> i.e., in some years, at least half of the respondents declared a lack of even minimal knowledge of electoral laws and procedures. Knowledge, as Starosta (1993: 98) stated, was the weakest element of electoral attitudes, regardless of changes in the electoral climate, ordinance, and political context of elections. The problem was the wide social scope of the phenomenon because the very fact that it occurred is typical of the structure of socio-political attitudes.

Another finding concerned motivation. The reason Starosta gave for the negative attitudes towards elections was a negative attitude towards the general political climate and that the state operated as a macrostructure. The main driver of positive attitudes was the need to collaborate locally to address macrosocial issues. However, analysis revealed that even in 1990, the need to function and survive under precisely defined local conditions, with no obvious prospect of alternative solutions, was the driving force behind positive orientations.

The resulting picture of civic activity among rural residents in the early 21st century also reflects the relatively low levels in all the countries analysed by Starosta. Against this background, Canada was the most active society. Poland and many other countries of Central and Eastern Europe (e.g., Hungary, Bulgaria,

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<sup>11</sup> The term “coherence” refers to the relationships linking the cognitive component with the other components of attitude.

and Russia) were characterised by the withdrawal of citizens from the public sphere, which was manifested in a low level of interest in social issues, a lack of responsibility for the common good, and action to support the community. Political involvement in rural communities was derived from the influence of informal groups and narrow circles of social trust. Apathy was linked to the possibility of success outside the political sphere and the characteristics of social exclusion. Starosta conceded that political participation was not treated in normative but in rational terms, as a means of achieving benefits for the respondents.

The conclusions of the international surveys (ESS) showed great variation in civic participation in the countries surveyed. In general, the former Eastern Bloc countries, as well as Portugal and Spain, formed a group of countries with the lowest levels of civic participation. They are countries with authoritarian governments (Starosta 2010). Poland and many other Central and Eastern European countries (e.g., Hungary, Bulgaria, and Russia) have seen a decline in participation in elections and interest in politics or participation in political parties (Starosta, Stanek 2002). Starosta attributed this to the historically long influence of Russian political culture with a dominant authoritarian type of governance (Starosta 2016). Italy, Cyprus, and Switzerland were an intermediate group between the previous group and the Netherlands, Belgium, Germany, France, and the UK.

The highest levels of civic participation were found in Scandinavia (Finland, Denmark, Norway, and Sweden). Starosta explained this through the excellent service system for rural residents, the large number of voluntary associations in the area, and the partnership style of government officials (Starosta 2010). The most frequently cited form of political participation in Poland over the years was participation in elections, while the least frequently cited form was membership of political parties and systematic work within groups. Only in rural Canadian communities were there other forms of political involvement. The results led to the conclusion that the longer the tradition of democratic procedures and values, the higher the percentage of civic-subjective attitudes. It also led to less frequent withdrawal from public life and low susceptibility to externally induced mobilisation (Starosta, Stanek 2002: 118).

A study conducted among residents of post-industrial cities (Starosta 2016) also confirms a significant level of political alienation in all units analysed. Starosta explained the high level of alienation from the local political sphere by the elitist nature of local policies implemented in cities. The general level of mobilisation of local societies (for public activity) was in line with other international studies and was ranked very low. In conclusion, the order of mass society was present in Łódź, Panevezys, and Miskolc; the order of authoritarian and extraterritorial society was in Ivanovo; the order of authoritarian, massive, and civic society was in Adapazari.



## 5. Summary

In his research on political participation, a special place for Starosta was the central region of Poland, which today more or less corresponds to the borders of the Lodz Voivodeship, with its capital in Lodz. This is understandable since, as a researcher, he has been professionally associated for more than 50 years with the University of Lodz, one of the largest academic centres in the region. His research was conducted primarily in rural or small-town areas. However, his research approach evolved to an urban and international level. The choice of research area can be considered original and innovative, especially in the context of the transformation of post-socialist and post-industrial structures, and operating in different cultural, political, and socioeconomic systems. Here, we have both new EU member states (Poland, Hungary, and Lithuania), countries aspiring to EU membership (Turkey), and a country outside the EU (Russia) and non-European (Canada).

Paweł Starosta is a sociologist who primarily uses quantitative methods. The most commonly used research technique is the interview questionnaire. The desire to construct relatively large and representative samples allows the use of advanced statistical calculations and the generalisation of conclusions to entire populations. The multifaceted nature of the quantitative analyses he used should also be noted. Among other things, he used measures of central tendency and examined relationships between variables using one-way analysis of variance. He used regression analysis and cluster analysis to learn about the relationship between variables, and he used the Eta coefficient, among others, to measure its strength. He always checked the reliability of the constructed scales using Cronbach's Alpha and their homogeneity using factor analysis. In his work, political involvement was treated as an independent variable, whose level and determinants he tried to determine. Only the most recent work discussed (Starosta 2016) concerns the treatment of political participation as an explanatory variable. We should also appreciate the organising aspect of both the proposed typologies and the characteristics of the conditions that affect the level of the phenomena discussed. Despite the desire to professionalise the methodological side, especially in his initial work, full information about the projects for which he conducted analysis was missing.

Participation in the public sphere has not been Starosta's main focus. This is evidenced by the relatively small number of publications on the subject. The originality of the work analysed lies in its ability to go beyond the analysis of electoral aspects that dominate the literature on the subject. It considers issues such as electoral subjectivity and alienation, self-assessment of political competence, social capital, and community involvement in local affairs. All this goes beyond the narrow definition of political involvement and allows him to use the term civic participation.

However, research on public participation in the publications selected for analysis does not consider an important aspect for civil society researchers, i.e.,

nonformal and associational activities. It includes, among other things, participation in the activities of nongovernmental organisations. Civic activity means, first of all, formal or informal voluntary activity in the sphere of social and political life. It aims to make changes in the local environment, solve social problems, and create the common good (Murawska 2020).

Starosta's research provides insight into the socio-political changes that occurred in Poland from the mid-1980s to the beginning of the 21st century. Thus, they allow us, if only to a small extent, to trace the political involvement of Poles over almost 40 years. Researchers rarely focus on public activity among rural residents in particular.

In conclusion, we see great application potential inherent in Paweł Starosta's research into civic participation, especially for today's younger generation of sociologists, political scientists, or geographers.

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## BENEFITS OF IMPLEMENTING THE 15-MINUTE CITY CONCEPT IN STIMULATING THE POTENTIAL OF SOCIAL URBAN RESURGENCE

**Abstract.** The issue presented in the article is a proposal to look at a specific vision of the socio-spatial organization of the city, namely the concept of the 15-minute city. In this proposed approach, this concept can become a source of inspiration for urban development, as well as a stimulating factor for the social potential of the urban community, which form the basis for the resurgence of cities after the crisis. In the theoretical realm, the basis for the considerations presented in this text is a socio-spatial perspective, according to which the city is perceived as a socio-spatial structure that is reproduced through daily social practices, reflecting both institutionalized patterns and the material organization of space. This text contributes to the discussion about the potential benefits of applying the 15-minute city concept for the development and resurgence of cities in line with the idea of livable cities, ensuring a high quality of life for their residents.

**Keywords:** 15-minute city concept, social potential, cities' resurgence.

## KORZYŚCI Z WDROŻENIA KONCEPCJI MIASTA 15-MINUTOWEGO W STYMULOWANIU SPOŁECZNYCH POTENCJAŁÓW ODRODZENIA MIAST

**Abstrakt.** Prezentowana w artykule problematyka stanowi propozycję przyjrzenia się określonej wizji organizacji społeczno-przestrzennej miasta, jaką jest koncepcja miasta 15-minutowego. W proponowanym ujęciu koncepcja ta może stać się źródłem inspiracji dla rozwoju miast, a także czynnikiem stymulującym społeczny potencjał odradzenia miast po kryzysie. W sferze teoretycznej podstawą rozważań przedstawionych w niniejszym tekście jest perspektywa społeczno-przestrzenna,

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zgodnie z którą miasto postrzegane jest jako struktura społeczno-przestrzenna, która reprodukowana jest poprzez codzienne praktyki społeczne, odzwierciedlające zarówno zinstytucjonalizowane wzorce, jak i materialną organizację przestrzeni. Niniejszy tekst stanowi wkład w dyskusję na temat potencjalnych korzyści płynących z zastosowania koncepcji 15-minutowego miasta dla rozwoju i odrodzenia miast zgodnie z ideą miast przyjaznych do życia, zapewniających wysoką jakość życia ich mieszkańcom.

**Słowa kluczowe:** koncepcja miasta 15-minutowego, społeczny potencjał, odrodzenie miast.

## 1. Introduction

In the ongoing contemporary discourse on cities, the issues of crisis and renewal, growth and contraction, decline and resurgence emerge with equal intensity. Considering the historical context of urban development, one can conclude that phases of crisis and renewal have followed one another in specific cycles. Political, economic, and natural factors have, on numerous occasions, led to the collapse of many cities. Paradoxically, these factors have also acted as stimulants for their development, as they prompted the search for ways to mitigate adverse situations and transform the unfavorable circumstances in which cities found themselves, thereby introducing new concepts of urban policy.

In recent times, particular attention has been devoted to the concept of urban resurgence, urban policies, or “idea for a city” aimed at guiding these local systems towards a path of development and breaking free from crisis situations (Montgomery 2015; Sim 2020; Moreno 2021). This is not a novel concern, as scholarly literature in fields such as urban planning, sociology, management, and economics, to name a few, has described significant examples of specific visions or ideals for urban development and renewal (Graham 2016; Sagan 2017). However, it seems that there is a current increase in the emergence of ideas, often based on distinct assumptions, about how to “fix” a city. The literature on this subject provides well-established knowledge, grounded in numerous scientific studies, regarding the factors influencing urban development, as well as its barriers and limitations. Over the past several decades, many concepts have been formulated in terms of the description of mechanisms and tools that, when employed by local authorities, can contribute not only to stimulating development but also to mitigating unfavorable situations that impede such development (Stawasz et al. 2012).

Cities worldwide are being engaged in actions aimed at transforming urban spaces, modernizing infrastructure, improving urban services, and striving to create better environmental, social, and economic conditions. Numerous new concepts of cities with specific names have emerged, such as sustainable cities, green cities, liveable cities, digital cities, intelligent cities, smart cities, knowledge cities, information cities, resilient cities, eco-cities, and low-carbon cities (De Jong et al. 2015). The cited examples do not exhaust the repertoire of concepts present

in academic and political discourse, with each aiming to capture and conceptualize the key principles of specific ideas for urban development and renewal.

Despite the numerous diverse ideas, both within the academic community and at various levels of political governance, there is a prevailing conviction regarding the significance of specific directions and goals for urban development that emphasize the principles of sustainability. This concept is arguably the most crucial paradigm that has shaped contemporary thinking about the development of urban areas, and the interplay between environmental, economic, and social aspects has become a fundamental principle of many concepts for livable cities (De Jong et al. 2015; Rzeńca 2016). However, the universally recognized and accepted goal of development has not led to the selection of uniform ways or tools for achieving it. Cities are therefore pursuing distinct paths that are expected to lead them to similar goals, emphasizing the enhancement of their functioning and the improvement of residents' quality of life. A modern city should thus care for our well-being, offer freedom of life, movement, and the shaping of our lives, fortify its mechanisms to withstand economic and environmental shocks. It should equitably share among its inhabitants space, access to services, mobility opportunities, joys as well as inconveniences and costs, allowing people to build and strengthen meaningful connections among themselves and acknowledge and respect the community of fate, thereby fostering empathy and collaboration (Montgomery 2015: 67–68).

Emerging from the work of Montgomery, the objectives increasingly find recognition within the formulated development policies adopted by the local authorities of many urban centers. This recognition is particularly prominent among those cities that, due to various reasons, have found themselves in crisis and are now focusing their efforts on overcoming these unfavorable circumstances. As highlighted by the latest PWC report, which addresses the directions of development and revitalization of British cities following the pandemic crisis, there has also been a noticeable shift in the expectations and aspirations of residents regarding the future of their cities. According to the report, the pandemic has caused a widespread shift in public priorities – people desire stronger connections with their communities and aspire to live in more environmentally sustainable and just places. Research has demonstrated that factors such as secure neighborhoods and vibrant local streets are among the primary expectations of residents (Good Growth for Cities, 2022).

The recent COVID-19 pandemic and the associated examination of urban spaces have prompted a critical reevaluation of urbanized areas and the search for ways to alter their previous functioning, as well as the necessity of effective crisis management (Ugolin et al. 2020; Wronkowski, Główeczyński 2021). This situation has also encouraged the exploration of transformational ideas to ensure residents' safety, ultimately contributing to the long-term enhancement of their quality of life (Moreno 2021).

The subject matter presented in this article proposes an exploration of a specific socio-spatial vision for urban organization: the concept of the 15-minute city. This



concept could serve as a catalyst and stimulator of the social potential of urban society, forming the foundation for post-crisis urban revival. The reference to the social potential of urban revival draws from the concept presented by Paweł Starosta in his book *Social Potential of Reviving Post-Industrial Cities* (2016). According to Starosta, it is precisely the resources of human and social capital, the level of social agency and mobilization, that constitute factors influencing the development and resurgence of a city in crisis. Although the author focused on their role in the transformation processes of post-industrial cities, it seems that this proposal carries universal value, making it significant in the renewal processes of cities experiencing various types of crises.

The presented text concentrates not only on the potentials themselves and their unquestionable role in urban resurgence, but also on the belief that the manner in which spaces are organized and utilized reflects processes occurring across all spheres of urban functioning: economy, social life, culture, and politics (Karwińska 2015). Indeed, the city is a socio-spatial system, with social phenomena finding their reflection in space. This reflection, especially in public spaces, is constructed in specific ways and significantly influences what occurs in urban society (Giddens 2003; Gehl 2009, 2014; Gottdiener 2010; Jacobs 2014; Bierwiazzonek 2016). The theoretical foundation of the considerations presented in this text lies in the socio-spatial perspective, wherein the city is perceived as a socio-spatial structure that is reproduced through daily social practices, which reflect both institutionalized patterns of action and the material organization of space (Smagacz-Poziemska 2015). These practices are treated as manifestations of the accumulated potentials and resources of social action within the local community.

Therefore, this text contributes to the discussion about the potential benefits of applying the concept of the 15-minute city for the development and revival of cities in the spirit of livable urban ideals that ensure a high quality of life for their residents. In the author's belief, the envisioned shaping of the city, as proposed by this solution, can serve as a source of inspiration for urban development and act as a stimulator of the social potential of urban society, which are crucial for processes of urban resurgence (Starosta 2016). Without a defined vision of urban transformation, it is challenging to mobilize these potentials in efforts to "fix the city."

## **2. Social potential of urban resurgence**

Nearly every city faces its own unique challenges and problems associated with periods of crisis and renewal. The crisis of contemporary cities, aside from extreme situations like the recent COVID-19 pandemic or natural disasters, primarily concerns various aspects of urbanization in its spatial, demographic, economic, and environmental dimensions (Szymańska 1995; Biłozor; Cieślak 2021).

The consequences of this crisis have led to increasingly noticeable issues related to access to resources, social inequalities, excessive environmental interference, as well as economic problems manifested in the social and spatial functioning of the city (Florida 2017).

Certain aspects of the discussion on urban crisis seem particularly prevalent in recent times, prompting questions about the role of cities in society, residents' rights to the city, and the ways in which cities are planned, constructed, and managed. This discourse often encourages radical changes in these respects (Le Lefebvre 2003; Harvey 2012). However, as indicated by Andrzej Majer (2011: 36), the crisis of cities has its counterbalance in actions taken within the realm of renewal policies or broader processes of urban revitalization. These actions, focused on specific spatial planning methods intended to bring about economic rejuvenation, also have a positive impact on what the author terms "the organization of the basic aspects of social life." Furthermore, they may contribute to the consolidation of new practices of democratization and social participation. Referring to actions undertaken since the 1950s in the United States through Urban Renewal, Majer (1997) highlights that these endeavors not only alleviate the consequences of economic crisis and prevent their direct outcomes, such as urban space degradation and social disorganization but also possess a social character. Similar efforts have been made in Western European countries (starting in the 1970s) as well as in Central and Eastern Europe (since the 1990s) within revitalization programs. Revitalization has been considered a "response to the processes occurring in the spatial and social fabric of the city due to structural transformations in the economy and culture" (Zuziak 1998: 13). It encompasses a range of initiatives focused on mitigating the effects of deteriorating living conditions, primarily in industrial cities. Its primary goal is to stimulate economic and social activity among residents within degraded urban areas, achieved through comprehensive and coordinated actions managed by the public sector in collaboration with other public, private, and social entities (Jadach-Sepiolo 2017). Importantly, actions conducted as part of social-spatial revitalization are designed to involve local communities.

Numerous examples exist of cities that have experienced revival through the involvement and engagement of local communities, capitalizing on their innovation. As Paweł Starosta (2016: 23) suggests, urban resurgence should not be limited to population growth, increased urban infrastructure, or improvements in production and consumption. It should focus on restoring mechanisms that enhance residents' quality of life, encompassing both material conditions of existence and satisfaction derived from creating social relationships that foster a sense of agency, social support, and security. Achieving this state is possible by harnessing the unique potentials embedded within the community, including human and social capital, as well as mechanisms of social mobilization and local leadership, involving well-defined, thoughtful, and planned spatial changes in cities. This is evident in the ideas propagated within the New Urbanism and Smart Growth movements (Majer 2011;

Starosta 2016), as well as in emerging concepts and urban policies (Gądecki, Kubicki 2014; Sagan 2017; Kubicki 2021).

Analyzing the processes of revitalizing post-industrial cities, Paweł Starosta has reflected on the significance of specific potentials, understood as “a set of social factors enabling social action and ultimately leading to solving local problems and improving or maintaining community welfare” (Starosta 2016: 54). As the author argues, drawing upon empirically researched outcomes (Mattessich 2009; Klekotko 2012; Suchacka 2014), the resources of human and social capital formed through relationships and social networks, social trust, and norms of reciprocity can lead to social cooperation. The effects of such cooperation contribute to the overall well-being of the community (Starosta 2016: 32–33). These resources can be viewed as unique potentials for urban revival, accumulated within the community’s assets, which emphasizes the focus on endogenous factors that drive urban development (Majer 2017: 105). Importantly, in cities, a variety of human behaviors and actions occur within a relatively limited, close spatial distance. This constitutes a crucial condition for interaction, exchange, and forms the vitality of the city (Scott 2008: 549). However, to support the beneficial significance of this limited distance, it is worthwhile to employ solutions in shaping the urban environment that foster social closeness. One such solution is the implementation of specific urban policies, such as the increasingly popular proposal for the development of a 15-minute city, which promotes spatial proximity to places that fulfill residents’ needs.

### **3. How the 15-minute city fosters the development of social potential in urban resurgence?**

In recent years, there has been a growing interest in the concept of the 15-minute city as a means of revitalizing urban spaces. This concept is recommended by the international coalition of mayors known as C40 Cities as a way for cities to address the consequences of the COVID-19 pandemic, improve the quality of life for their residents, build stronger local communities, and mitigate the impacts of climate change.<sup>1</sup> According to the author, this concept could also serve as a significant catalyst for the development of social potential in cities facing other types of crises, primarily those affecting the social dimension of urban functioning.

This idea responds to the challenges that contemporary cities confront: subpar public spaces, environmental pollution, traffic congestion, and inadequate access to essential services, especially in specific areas of the city. The proposed changes associated with the 15-minute city concept aim to address other negative phenomena

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<sup>1</sup> Read more here: [https://www.c40knowledgehub.org/s/article/15-minute-cities-How-to-ensure-a-place-for-everyone?language=en\\_US](https://www.c40knowledgehub.org/s/article/15-minute-cities-How-to-ensure-a-place-for-everyone?language=en_US) (accessed: 30.06.2023).

as well, including escalating social inequalities – particularly in access to certain urban amenities – and a low level of social participation and social bonds.

Articulated by Carlos Moreno (2021), a French architect and urbanist, the 15-minute city concept is founded on a simple premise. Rather than relying on lengthy car commutes, cities should be designed to grant residents easy access to all essential services within a 15-minute walk, bike ride, or efficient public transport journey. As the concept's creator contends, through the appropriate urban design, residents could enjoy a higher quality of life, saving time on burdensome commutes, and effectively utilizing six fundamental urban functions to lead a high-quality life in the city. These functions encompass daily life, work, commerce, healthcare, education, and entertainment.

Implementing the 15-minute city concept necessitates meticulous spatial planning and infrastructure investments. It requires the creation or transformation of existing residential neighborhoods, outfitting them with diverse functions to ensure convenient access for residents. Furthermore, investing in an expanded network of bike paths, sidewalks, and public transportation conducive to unhindered urban movement is imperative (Allam et al. 2021). Incorporating these aspects into urban planning holds the promise of reducing inequalities in infrastructure access and ensures that cities avoid unequal treatment of different demographic groups based on their socio-economic status or age (Weng et al. 2019). This approach aligns with the idea of a just city, founded on the equitable distribution of urban goods to grant all residents access to them (Bramley et al. 2009; Fainstein 2010).

What is particularly intriguing is the influence of specific spatial arrangements on the social functioning of urban communities and the potential to achieve a positive effect in the form of enhanced social capital. Let's explore how the principles of the 15-minute city can contribute to the social resurgence of cities by developing the resources of human and social capital, as well as social agency and mobilization.

In recent years, significant attention has been dedicated to health as a component of human capital (Makuch 2009). Public health is considered a fundamental precondition for economic development in a country. Elevating the health of the population through concerted actions (including healthcare expenditures) and promoting health-enhancing behaviors related to increased physical activity lead to heightened societal well-being and economic growth. Health contributes to augmented income by boosting workers' productivity, constituting a pivotal factor in the economic growth of entire societies (Bloom, Canning 2003).

A pivotal aspect of the 15-minute city concept is the reduction of distances residents need to traverse to fulfill their needs related to various daily activities. This aspect can influence residents to forego individual car transport. Consequently, the emphasis is placed on pedestrian movement, cycling, and efficient public transportation, offering urban community members the opportunity for increased physical activity, the health-promoting consequences of which are well-known. It's worth noting the reduction in the danger of road accidents, which is a prevalent

issue in countries where the car is the primary mode of transportation. Conversely, positive examples emerge in places where cycling is a distinct expression of urban lifestyle. Thus, it's not surprising that Denmark and the Netherlands are at the forefront of European countries with the lowest number of fatalities in road traffic accidents (Raczyńska-Buława 2016). Reducing car use in favor of walking and cycling also diminishes air pollution, a crucial health-enhancing factor. This stance also found recognition in the Europe 2020 Strategy, where the primary goal of European transport policy is to establish a high-quality mobility system that significantly reduces CO<sub>2</sub> emissions. To achieve this measures facilitating pedestrian and cycling movement are promoted (Ciastoń-Ciulkin 2016). Initiatives such as establishing bike parking areas, creating secure and preferential cycling lanes over car traffic, pedestrian pathways, and bicycle rental services – exemplified by Mexico City and Bengaluru in India<sup>2</sup> – are proposed of solutions leading to their realization.

The greater presence of people in public spaces, achieved through their proper arrangement, preparation, and adaptation to social needs, also creates opportunities for spontaneous human interaction. The significance of well-designed public spaces was recognized by Jane Jacobs (2014), who emphasized that streets are vital elements of the urban fabric and should be accessible and appealing to pedestrians. Their presence enhances feelings of safety and offers opportunities for urban activism and the foundation of communal bonds. Criticism of modernist planning, characterized by functional zoning, segregated districts, road networks, and highways that promote individual car transport, negatively affected human connections and the social nature of cities. Spatial planning principles such as proximity, density, and diversity – advocated in the concept of the 15-minute city – provide opportunities for renewing social interaction networks in different city segments (Sim 2020; Moreno 2021). Similar arguments advocating human presence in public spaces are found in the works of Jan Gehl (2009, 2014). He emphasizes the need for pedestrian-friendly urban areas that encourage interaction and social activity. Strengthening the importance of urban public spaces constitutes a fundamental premise for the development and revitalization of cities under the ideas of “cities for people” (Gehl 2014), “happy cities” (Montgomery 2015), or “the well-tempered city” (Rose 2019). These concepts consider their interactive social significance as the basis for building social bonds in local communities (Bierwiazzonek 2021). The role of public spaces that encourage people to gather and engage in various activities becomes increasingly important with their attractiveness. This is achieved through the presence of user-friendly amenities. Jan Gehl, while critiquing city development directions favoring car traffic, calls for a return to pedestrian movement as a more

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<sup>2</sup> For more examples of innovations implemented as part of urban transformation in the spirit of the 15-minute city, see, for example, publications: *Walking and Cycling Benefits Tool; Benefits of Walking and Cycling: Mexico City Massive Bike Parking Facilities, Benefits of Walking and Cycling: Bengaluru Tender SURE*, available at: <https://www.c40knowledgehub.org> (accessed: 16.08.2023).

natural and genuine way to navigate urban space. Supported by theoretical studies, observations, and research, he demonstrates that this shift has a fundamental impact on the quality of life in cities.

The modernization of urban public spaces to serve the needs of the community also includes the expansion of green areas that encourage outdoor activities. Among the good practices cited in C40 Cities publications are examples of converting floodplains into parkland areas, such as Crystal Springs Creek in Portland, transforming unused spaces into multifunctional community gardens like in Gladsaxe, Denmark, excluding streets from car traffic around parks, improving infrastructure for pedestrians and cyclists around Plaza Parques Nacionales Argentinos in Buenos Aires, and repurposing school grounds as small neighborhood parks, as seen in Paris.<sup>3</sup>

Transformations within the framework of the 15-minute city aim to build social bonds and strengthen neighborhoods and local communities. When residents have access to a full range of services in their immediate vicinity, they become more engaged in social life. Local shops, cafes, and restaurants can invigorate the local economy and encourage interpersonal interactions. Through these social mechanisms, social capital is created, with manifestations rooted in and activated through human relationships. The key resources of social capital are developed within networks formed under social trust and community norms (Bartkowski 2007; Starosta 2016). “Social capital is sustained by diverse incentives for individuals, enabling them to undertake certain actions through networks of mutual acquaintances and recognition. The character of social interactions plays a significant role in this process. Mutual trust arises, is sustained, and develops within specific relationships between individuals” (Bartkowski 2007: 58). A certain approach to city design, facilitating opportunities for encounters, can serve as an incentive for building networks of social interaction and trust.

The 15-minute city concept also addresses local entrepreneurship as a factor of increasing local employment opportunities. It promotes the establishment of local businesses, grocery stores, and service outlets in proximity to residential areas, which can support the local economy and activate local communities economically. In this context, it can also be seen as a way to mobilize the local community in economic spheres. High unemployment rates, especially in certain parts of cities, are a pressing social issue in many places. This approach could serve as a means of addressing this challenge. It leads to easy access to various services and products, as well as benefiting from the development of the local community and enhancing a sense of local belonging. Higher density and availability of services in close proximity facilitate greater interaction among residents and strengthen social bonds (Bramley 2009). As emphasized by former Oklahoma City mayor Mick Cornett,

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<sup>3</sup> More examples in the publication: *15-minute cities: How to develop people-centred streets and mobility*, available at: [https://www.c40knowledgehub.org/s/article/15-minute-cities-How-to-develop-people-centred-streets-and-mobility?language=en\\_US](https://www.c40knowledgehub.org/s/article/15-minute-cities-How-to-develop-people-centred-streets-and-mobility?language=en_US) (accessed 16.08.2023).

implementing these principles can stimulate the local economy. Increased activity on streets, better utilization of buildings and public spaces, a broader array of local and diverse employment opportunities are just some of the benefits of investing in people-focused urban spaces. These investments, he claims in his speech,<sup>4</sup> managed to turn the city's economic prospects around and concurrently reduce obesity issues among residents within just a few years.

Introducing the 15-minute city concept naturally comes with significant challenges for local authorities and requires collaboration with various stakeholders, including developers, architects, and residents. The issue of consulting proposed city changes with residents is particularly important. Numerous successful implementations of similar ideas, such as Anne Hidalgo's "Paris en Commun" project, the Aspern Seestadt new district in Vienna, Västra Hamnen in Malmö, or Vauban in Freiburg, demonstrate that such initiatives are feasible and yield positive results.

#### 4. Conclusion

The concept of the 15-minute city should not be regarded as a panacea for all the challenges contemporary cities face or as the ultimate solution to urban crises. However, as elaborated in this text, it can be viewed through the lens of its unique potential to strengthen specific social resources, human behaviors, and actions. Its implementation through specific urban policies also doesn't guarantee its success, especially if these solutions are imposed from the top down without engaging the urban community.

Yet, changing urban spaces and modes of movement within them can indeed lead to tangible effects, stimulating the potential of urban communities. These potentials are essential resources employed in the process of urban resurgence after crises (Starosta, 2016). In this context, the 15-minute city can also be an opportunity for cities still seeking their identity and experimenting with various, more or less successful, attempts to revitalize and achieve their core goal of ensuring high-quality living for residents.

Urban spaces, poorly developed and underutilized, often degraded, could be rearranged in accordance with the principles of the 15-minute city concept, thereby providing impetus for improving the functionality of space of local communities facing numerous challenges. Actions undertaken within revitalization programs in Polish and European cities can align with the principles of such a characterized concept of urban renewal and serve as a tool for its realization. Revitalization processes based on the principles of sustainable development aim to prevent further

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<sup>4</sup> Mick Cornett's speech is available at: <https://www.tedmed.com/talks/show?id=54790> (accessed 22.08.2023).

spatial degradation, mitigate crises present in cities, stimulate their development through improving living environments, and enhance social and economic activation of the society (Domański 2009; Maciejewska, Turek 2012; Fernández Agueda 2014; Stawasz 2017). Incorporating proposals for cities with short distances would thus complement the main goal of revitalization, which is to improve the quality of life for urban residents. It's worth highlighting the significant role of local community participation in revitalization processes, with social and economic activation as a fundamental objective and outcome of renewing degraded city parts (Sztando 2008; Przywojska 2016). In addition to the undoubted benefits of reducing pollution and increasing social inclusion in accessing certain goods and places without having to travel long distances, the concept can positively impact the local community by increasing its resources of social capital, human capital, and social subjectivity and mobilization necessary for urban resurgence processes.

However, for this concept to be implemented, it requires the goodwill of urban authorities, willingness to bear the high costs associated with urban space reconstruction, and perhaps most importantly, a change in the way we think about the city as a place to live, in line with the guiding theme of World Cities Day celebrated annually since 2014 – “Better City, Better Life.” The role of well-organized residential neighborhoods equipped with necessary infrastructure that encourage public space use, a well-functioning transportation network with a focus on pedestrian, cyclist, and public transportation movement, are challenges that cities aiming for such a vision must face. Yet, to ensure that this city reorganization isn't just another realization of a new form of centralized planning, a criticism raised by some opponents of the 15-minute city concept, increased citizen participation is crucial at every stage of its implementation.

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## LODZ IN THE PROCESS OF DEINDUSTRIALIZATION SOCIAL ASPECTS OF 1990–2004 SYSTEMIC TRANSFORMATION

**Abstract.** The aim of this article is to present a brief history of Lodz in view of historical events leading to the deindustrialization of the city during the period of Poland’s economic transformation. As a “great change” trauma of 1990 to 2004, juvenilization of poverty in Lodz has been documented. This phenomenon seems to be disregarded and unnoticed by architects and implementers of the transition from a centrally planned economy to a market economy.

**Keywords:** Lodz, economic transformation, juvenilization of poverty.

## ŁÓDŹ W PROCESIE DEZINDUSTRIALIZACJI. SPOŁECZNE ASPEKTY TRANSFORMACJI SYSTEMOWEJ 1990–2004

**Abstrakt.** Celem artykułu jest przedstawienie krótkiej historii Łodzi na tle wydarzeń historycznych prowadzącej do dezindustrializacji miasta w okresie transformacji gospodarczej Polski. Jako trauma „wielkiej zmiany” w latach 1990–2004 dokumentowana jest juvenilizacja biedy w Łodzi, niebrana pod uwagę i niedostrzegana przez architektów i realizatorów przejścia od gospodarki centralnie sterowanej do gospodarki rynkowej.

**Słowa kluczowe:** Łódź, transformacja gospodarcza, juvenilizacja biedy.

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## 1. Lodz – the outline of the city’s history leading to systemic transformation

The process of Lodz becoming a “postindustrial” city is inextricably linked to the Poland’s systemic transformation of the 1990s, facilitated to a great extent by a convergence of internal circumstances (exhaustion of Poland’s developmental potential within the existing political-economic framework) and certain external factors (*perestroika* in the Soviet Union along with shift in policy towards Eastern Bloc countries, including a declaration of non-interference in their internal affairs). However, the process took significantly more severe course, due to the city’s size distinct from other cities’ social structure and the inhabitants’ sources of income, unnoticed (or perhaps disregarded) by architects and implementers of the systemic change. The residents of the city were forced to struggle with the consequences of a “tsunami” caused by the industrial collapse and the unprecedented pauperization on a vast scale.

Leszek Balcerowicz views the economic transformation of Lodz as “successful”, attributing it to the absence of any central government program that would support the city (unlike the contract for Silesia), since the transformation unleashed entrepreneurship.<sup>1</sup> However, he does not mention the social costs and enduring repercussions of the “shock therapy” experienced in Lodz.

Due to its distinct from other cities’ origins and development, Lodz holds a unique position as a big city in Poland. It lacks medieval beginnings, characteristic architectural elements, and social structures. It was structured as an industrial city within the Kingdom of Poland during the latter half of the 19th century, situated on the western periphery of the Russian Empire in the Piotrków Governorate, initially as a settlement, where manufactures were located, rapidly transformed into the largest industrial city in this part of Europe, producing cotton textiles and eventually other light industrial products. Russia was the primary supplier of cotton and constituted the largest market for the goods produced here. The massive and rapid influx of population brought an irrepressible expansion of the city. Janusz Skodlarski and Rafał Matera (2014: 107) report that within the span of one hundred years, the population of Lodz increased a thousandfold (from 500 to 500 000 citizens), whereas the city’s area expanded fivefold (to nearly 6000 square km) due to the incorporating nearby villages. In the period between 1860 and 1912, the value of the textile industry’s production in Lodz grew seventy-fivefold. “Lodz became an exemplification of American-style development pace, the one-dimensionality

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<sup>1</sup> “According to the report by FOR, it can be inferred that in Lodz – in my opinion, fortunately [emphasis added by W.W.K.] – there hasn’t been any detailed state intervention. Such intervention is often politicized and signifies a squandering of funds...” *The Decline of Lodz Factories* an Interview with Prof. Dr. Leszek Balcerowicz. Source: <https://lodz.wyborcza.pl/lodz/7,35136,27561181,leszek-balcerowicz-w-autoryzacji.html>

of production structure, and the overwhelming dominance of the central hub” (Skodlarski, Matera 2014: 109).

The city developed vigorously around factories, without the emergence of a central marketplace. What was characteristic of the city was its ethnic diversity: coexistence of Poles, who, after the abolition of serfdom, were eager to find employment in factories and as domestic servants; Germans, who owned factories as well as held technical supervisory positions (foremen, supervisors); Jews, engaged mainly in trade, among whom later emerged established industrialists and bankers; and a large population of impoverished residents in Bałuty (the largest village in Europe with 100,000 inhabitants), incorporated into Lodz in 1915. Russians constituted the least populous group, who served as law enforcement and administration personnel until the First World War. They left the city after it was occupied by Germans during the war.

The First World War, the looting of modern factories by German occupiers, the Russian Revolution, and the formation of the Soviet Union led to severance of economic relations and an economic downturn of the city. Lodz did not manage to recover from this decline until the outbreak of the Second World War (much like the economy of Poland in general). The city lost its developmental momentum. The global economic crisis and hyperinflation exacerbated the situation. According to Stefan Kawalec (2018) “... between 1925–1928, Polish exports to Russia and the Baltic countries constituted only 8% of the value of sales from Polish territories under Russian rule to Russia in 1910. The loss of key export markets was a major factor hampering the development of the Polish economy in the interwar period”. Nevertheless, the city’s population did not cease to grow. In 1919, Lodz was home to 400,000 residents, and by 1939, the population rose to 670,000 inhabitants.

Although Lodz became the capital of a newly created voivodeship in 1919, its social structure was still characteristic of an industrial city. According to the 1931 census, workers accounted for 69.7%, small merchants and craftsmen for 18.8%, intelligentsia for 9.6%, and entrepreneurs for 2.1% of the total number of people working in the city (Puś 1987: 85). Lack of residential premises and very poor housing conditions were pressing issues. In 1931, according to the census, single-room dwellings constituted 63% of the city’s total housing stock. The sewage system, completed in 1932, was available to only one-third of the city’s residents.

During the invasion of Poland by the Nazi army in September 1939, Lodz was not destroyed.<sup>2</sup> It was also not demolished when the Germans fled from the Red Army in January 1945. Therefore, the city’s housing needs were not a priority for the central authorities, who decided on the allocation of resources to individual regions and cities. The ethnic structure of the city changed profoundly after the war. Lodz became an almost homogeneous city in terms of its nationality and religion. The

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<sup>2</sup> In October 1939, the city was incorporated into the German Reich under the name “Litzmannstadt” as part of the so-called Wartheland, with Poznan as its administrative capital.

extermination of the Jewish population during the occupation and the refuge and forced displacement of the population of German origin after the end of warfare gave rise to the hope that housing needs would be more easily accessible for the newcomers from the surrounding countryside and that employment in factories would be immediately available. "...in April there were already 728 enterprises in operation, and by the end of 1945 – 903 enterprises were functioning employing 102,500 people. The first industry to commence operations was the dominant textile industry, which in 1946 was already almost 80% operational, employing over 84,000 workers and accounted for about 80% of total production." (Illustrated Encyclopedia of Lodz History, no. XI/17, p. 309). The number of inhabitants increased rapidly. In December 1945, the population numbered 503,000, whereas in 1960 it reached 717,00, placing Lodz in the second position in Poland in terms of population. However, the city struggled with water shortages, inadequate city transportation and poor communication between distinct parts of the city, exacerbating housing shortages and the poor technical condition of the existing housing stock.

In the 1950s and 1960s, the central authorities implemented a policy of "deglomeration" in Lodz by prohibiting permanent registration of residence of newcomers and restricting water-intensive industrial development (Jarno 2019: 24). The machinery park in Lodz factories underwent a process of decapitalization. Working conditions within factories constructed in the 19th and early 20th century were extremely challenging (noise, pollution, chemical fumes) and the introduction of the three-shift system worsened the conditions.

The policy of "deglomeration" resulted in Lodz, which also previously did not enjoy a good reputation, being labelled a city lacking development prospects. This opinion is partially responsible for the fact that Lodz lost its competitive advantage over other cities in the competition for development funds. Furthermore, this state of affairs was also influenced by the fact that it was dubbed a "city of women". The neglect of Lodz also stemmed from the fact that during the Cold War, heavy and extractive industries were prioritized. The city's share of the global contribution to the domestic industry declined from around 9.6% in 1937 to 7.4% in 1960 (Jarno 2019: 24). In 1969, the degree of decapitalization in Lodz industry exceeded 50% (Illustrated Encyclopedia...: 310).

It was not until the 1970s that Lodz experienced an unprecedented period of development. This occurred as a consequence of the strike in February 1971, which involved more than 50,000 workers from Lodz factories, including those employing crews of many thousands, predominantly women, as a result of which the government was led to withdraw the planned increase of food prices.

This unexpected (following the famous Gierek's question: "will you help?" asked at a Gdansk's Shipyard) mass protest drew the attention of the central authorities to the living and working conditions in "the city of textile workers" and contributed to the most significant modernization of industry and the city in the post-war period. On November 29, 1971, the Council of Ministers adopted a resolution regarding the

implementation of the locally prepared “Development and Modernization Programme for Lodz for the Period up to 1975 and the Following Years”, allocating a budget of 34.5 billion PLN, nearly twice the amount planned in the previous 5-year plan (Jarno 2019: 27). 55% of these funds were to be utilized for the modernization of industry, including the establishment of factories<sup>3</sup> on the outskirts of the city, also breaking the industrial monoculture. The remaining resources were designed for the improvement of the water balance, enhancing transportation, housing<sup>4</sup> and services. In Lodz, as in many other places, investment funds were sourced from foreign government loans and were intended to be self-financing from the sale of finished goods. However, there were delays of completion of individual enterprises, and the ones completed on time did not offer products of the quality acceptable to foreign buyers. Production downtime caused by shortages of raw material and electricity generated costs for the enterprises. Nevertheless, during that period, the living and working conditions improved significantly, fostering hope that this state of affairs would be sustainable.

In 1979, the first economic crisis in the times of the Polish People’s Republic (PRL) emerged and lasted until 1982. In March 1981, the government informed foreign creditors that it could no longer service the debt and requested a deferral of payment. The implementation of numerous major investments was halted throughout the country, not excluding Lodz.

The political atmosphere in Poland was increasingly tense. On 13 December 1981, martial law was imposed. The NSZZ Solidarność (Independent Self-Governing Trade Union, which had been founded a year earlier, was initially suspended, and then outlawed. Attempts to revive the economy in the following years did not bring anticipated outcomes. 1988, brought another wave of strikes.

The last communist government, whose prime minister was Mieczysław Rakowski, introduced two resolutions aimed at implementing free market principles into the socialist economy. The first law (known as “the Wilczek Act”), passed on 23 December 1988 by the Sejm of the People’s Republic of Poland, introduced the principles for initiating and conducting economic activities on equal terms

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<sup>3</sup> In Lodz, 70 major investments were put into operation, including textile factories such as “Vera,” “Feniks” Hosiery Industry Works, “Pierwsza” Silk Industry Works, “Teofilów” Textile and Clothing Complex, “Dywilan” Carpet Manufacturing Plant, clothing industry enterprises like “Próchnik” and “Wólczanka,” “Chemitex-Anilana” Artificial Fiber Works, “Unitra-Fonica” Radio Equipment Plant, “Poltik” Watch Factory, “Polmo” Automotive Accessories Factory, “Polfa” Pharmaceutical Works, “Stomil” Rubber Industry Works, and “Elta” Transformer and Traction Equipment Factory.

<sup>4</sup> During the “Gierek’s era,” 90,000 apartments were built in Lodz. These included residential estate like Retkinia, the residential estate of Zgierska-Julianowska-Stefana, the residential area between Zgierska-Inflancka and Marysińska, Radogoszcz Zachód and Radogoszcz Wschód, as well as the Piastów housing estate between Sanocka and Gagarina streets. A few years later, to the south of Chojny and beyond the circular railway line, a significant housing estate named after the 40th anniversary of the PRL was erected. Further new estates were developed in the extension of Widzew Wschód. Additionally, segmental estates were constructed in areas like Pienista, Smulsk, and Radiostacji (Illustrated Encyclopedia of Lodz History, issue no. XII/16).



(Article 1 of the Economic Activity Law) and the principle stating that what is not prohibited by law is permitted. According to Rafał Skibicki (2019: 482), this was the most liberal law regulating economic activity in modern Polish history. On the other hand, the Resolution of the Council of Ministers, which came into effect on 1 August 1989, meant the discontinuation of the administrative method of regulating prices, retaining official prices only for certain goods, such as milk, cheese, and bread. To offset the increase in expenditure on the purchase of basic food items, this regulation also provided for the application of so-called “protective measures”, including cash supplements to wages, annuities, and pensions. This resolution triggered hyperinflation, which in 1990 amounted to 585.8% year on year, simultaneously serving as a significant step towards a market economy.

## **2. The deindustrialization of Poland during the economic transition**

The arrangements of the Round Table (February 6, 1989 – April 4, 1989, paved the way for a radical change of the political and economic system. The systemic economic change known as the “Balcerowicz Programme”, colloquially referred to as “shock therapy”, was initiated with the concurrently of Tadeusz Mazowiecki’s government in September 1989. Its objective was to shift from the command-and-control and highly statist system into a free-market economy, understood as entering the path of development characteristic of a capitalist system, and in the political sphere to democratize the political life.

On 1 January 1990, ten laws came into effect to ensure the transition to a market economy:

1. The Act on the Financial Management of State-Owned Enterprises enabled the initiation of bankruptcy proceedings for unprofitable state-owned enterprises, abolishing the guarantee of existence irrespective of their financial performance and production.
2. The Banking Act, aimed to stabilize the situation on the monetary market, in particular by prohibiting issuance of money without proper backing. The National Bank of Poland lost the power to finance the budget deficit.
3. The Credit Act – abolished credit preferences for state-owned enterprises and linked the interest rate to inflation.
4. The Law on Tax on Wage Growth – introduced the so-called “popiwek”, i.e., the constraint of wage growth in companies in relation to inflation.
5. The New Taxation Principles Act introduced uniform tax payment regulations in all branches of the economy.
6. The Act on Foreign Invested Businesses provided a degree of freedom of capital movement, at least concerning exporting abroad the profits generated by foreign companies in Poland. These companies were exempted from popiwek. They were solely obliged to resell foreign currency at the exchange rate determined by the National Bank of Poland.

7. Foreign Exchange Act – introduced internal convertibility of the Polish zloty and abolished the state monopoly in foreign trade. Enterprises were obliged to sell foreign exchange they earned to the state.
8. The Customs Act unified the rules for the customs clearance of imported goods for all economic entities.
9. The Employment Act primarily annulled the law on individuals evading the obligation to work, modifying the principles for employment agencies.
10. The Act on Special Conditions of Employment Termination introduced protection for employees laid off by providing instruments such as financial severance pay and periodic unemployment benefits.

“The Balcerowicz Programme”, as this legislative package was named, constituted the first attempt in the Communist Block to reverse economic history, i.e., by transitioning to capitalism after several decades of a socialist economy. Its radicalism is associated with the collaboration of the International Monetary Fund and the World Bank interested in reducing Poland’s debt (Kowalik cited in Rolski; Paradysz 2015: 59). During the legislative phase, Karol Modzelewski and Ryszard Bugaj unsuccessfully aimed at amending the programme, pointing out social consequences of the proposed solutions.

The assumptions and implementation of the programme continue to spark debate. One of the critics is first of all Grzegorz Kołodko, who characterized the economic transformation principles applied in Poland in line with the recommendations of the Washington Consensus as follows: “Liberalize as much as you can, privatize as fast as you can, and be tough in fiscal and monetary matters!” (1998) and contrasted it with a programme of “shock-free therapy”, increasing the role of the state in the privatization of the economy. The process of spontaneous deindustrialization stemming from the aforementioned legislative solutions commenced in 1990 with the implementation of the above-mentioned laws.

Paradysz (2015: 59) points out that the financial situation of enterprises leading to their liquidation was influenced by the actions of the banks and ministries responsible for the industry, through:

- the application of excessive fiscalism, aimed at maximizing budget revenues, increasing income tax rates (even exceeding inflation rate), as well as the establishment of an additional tax on exceeding a set limit of wages (*popiwek*) along with significant reductions in product subsidies;
- irregularities in the banking sector’s relations with state-owned enterprises, manifested through excessive increases in interest on loans and credit instalments in conditions of hyperinflation, as well as the limitation of the amount of new loans;
- introducing a premature and complete liberalization of foreign trade and a significant reduction of customs duties led to the collapse of many even of these activating enterprises, as early as 1990. Plants with numerous cooperative connections collapsed as well;

- the absence of an industrial policy enabling the defense of certain industrial sectors, especially modern and high-tech industries, which are exceedingly vital for the development of the industry (Paradysz 2015: 60).

The privatization of industry, which took place in a haphazard manner, without a prior inventory or proper documentation, without a controlled and systematic archiving of documents related to the transformation, takeovers and liquidations of state-owned enterprises, is also subject to criticism. Consequently, there is a lack of documented data regarding the extent of the phenomenon, its progression and sale prices.

Paradysz (2015) indicates the following irregularities accompanying excessively rapid and spontaneous privatization of enterprises, at negative prices and in numerous cases favoring foreign capital:

1. The so-called hostile takeovers, i.e., the purchase, requalification for a different business activity, or closure of an enterprise in order to eliminate competition, or demolitions aimed at obtaining significant profits from the sale of post-industrial land;
2. The decomposition of enterprises, i.e., dividing and selling the most valuable segments of a business, followed by declaring bankruptcy and neglecting the remaining segments of;
3. Leading to the bankruptcy of the factories reclassified as National Investment Fund companies (Paradysz 2015: 60–61).

The balance sheet of the economic transformation, as per Paradysz (2015: 61–62), is as follows:

- 43% (1,675) of the total number of enterprises examined were liquidated, losses in assets reached 37%, production – 38%, and employment – nearly 50% of the total potential of the surveyed establishments;
- more than 2 million people lost their jobs, which shaped the permanent registered unemployment in the country (at the beginning of the 1990s it amounted to approximately 3 million people);
- over 2 million economically active people emigrated abroad, including more than 40% with higher education;
- the size structure of business entities in the industry has become fragmented;
- the number of employees in the research and development facilities of industry decreased dramatically (14,500 individuals in 2012, compared to 60,500 in 1990);
- production processes are limited to the assembly of product components, usually imported;
- the branch structure of the industry has become haphazard rather than programmed in an optimal and modern manner. 47.7% of total employment in industry is in the is concentrated in five branches of consumer and service-oriented industries;
- the state budget is not engaged in constructing new industrial plants.

Poland has become a service-industrial-agricultural country, concludes the author cited above.

### 3. Lodz in the period of transition. Trauma of the great change

The aforementioned phenomena also took place in Lodz.<sup>5</sup> However, their influence on the living situation of the inhabitants was notably more widespread than in other large cities due to the city's initial situation at the end of the 1980s. Firstly, due to the fact that despite attempts to break the industrial monoculture in the last years of the Polish People's Republic, the significant majority of the city's workforce was still strongly connected to the light industry. The liquidation of the Council for Mutual Economic Assistance and the interruption of trade relations with the USSR and then Russia, together with the central government's policy towards state-owned enterprises during the transition period, led to substantial losses in employment in the textile industry (a decline of 86.1%) and leather industry (a decline of 84.5%) (Paradysz 2015: 62).

In Lodz, as early as in 1991, the sold production of textile products declined by over 40% compared to 1988 (Jewtuchowicz, Suliborski 2009: 401). Together with reduced credit access and increased costs of servicing debt, led to mass bankruptcies of enterprises, which were also exposed to uncontrolled competition from Chinese firms.

Unemployment in Lodz was rising exponentially in the first years of the last decade of the 20th century, primarily due to the collapse of enterprises employing thousands of workforces. In 1993, the unemployment rate in Lodz reached 21.3%, significantly higher than the unemployment rate in Poland (16.4%). Lodz, as the only large city, was placed on the list of so-called problem areas, i.e., areas threatened by structural unemployment. Such qualification guaranteed a three-month severance pay for employees who were collectively made redundant and extended the duration of receiving unemployment benefit to 18 months. After this period, it was possible to apply for social assistance benefits, contingent upon a household wealth assessment, which was assessed by a social worker. The situation of many inhabitants of Lodz became very challenging, as in numerous families all adult family members worked in factories.

The economic transformation signified, therefore, for the city's inhabitants, bidding farewell to the principle of full employment, applied in the PRL and a cascading increase in the number of unemployed. It seems that many of them were unaware of the consequences. Receiving money from the Labor Office 'for nothing' initially might have been met with contentment by some people. However, the loss of the status of a working individual, i.e., being financially self-sufficient and agency, became a traumatic experience for many. Exclusion from the labor

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<sup>5</sup> The illustration of the fate of Lodz industrial plants is provided in an excellent publication by Agata Zysiak and others (2022) titled *Wielki przemysł, wielka cisza. Łódzkie zakłady przemysłowe 1945–2000 (Great Industry, Great Silence: Lodz Industrial Plants 1945–2000)*, University of Lodz Publishing House, Topografie Publishing House, Lodz.

market consequently equaled exclusion from the circles and institutions of the workforce, which could have been activated in challenging times. Nonetheless, unemployment did not only have short-term financial consequences while it lasted. It resulted in granting low pensions, due to the short contribution period. Today's thirteen and fourteen pensions would perhaps be unnecessary for the residents of Lodz if it was not for the prolonged unemployment, which for many turned out to become chronic. What is more, bridging pensions, which served as a means to stay afloat and offered a steady income, have resulted in low pensions after years.

After 33 years since launching economic transformation programme, Leszek Balcerowicz claims that it is pointless to consider the social costs initiated by his economic reforms, as an alternative to more generous social protections would have been a return to a socialist economy. He maintains that the mistake of the government which was in charge of economic affairs was the implementation of overly liberal principles for granting unemployment benefits and introducing bridging pensions. According to the author of the "Balcerowicz's programme", granting unemployment benefits to school graduates restricted their job-seeking activity, burdened the state budget, and unjustifiably increased the number of registered as unemployed individuals.

Controversies over the extent of unemployment and its effects primarily concern adults, and research conducted at the University of Lodz in 1996–1999 revealed that the victims of the economic transformation in Lodz were (are) mostly children who were neither the focus of interest nor concern of the architects of "the great change".

This fact was identified by sociologists from Lodz, carrying out a research project entitled *Forms of Poverty and Social Threats, as well as Their Spatial Distribution in Lodz*<sup>6</sup> commissioned by Lodz voivode from the Scientific Research Committee at their inspiration. It turned out that in each of the four districts of Lodz for which relevant data were available, the poverty rate among children exceeded the poverty rate among adults in 1996.<sup>7</sup> In other words, the proportion of children

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<sup>6</sup> Research project commissioned under PBZ grant no. 018 08 titled "Forms of Poverty and Social Threats and Their Spatial Distribution in Lodz" (1996–1999); project leader: W. Warzywoda-Kruszyńska.

<sup>7</sup> In the 1990s in Lodz, an integrated system for registering households receiving targeted assistance due to poverty did not exist. Each district social assistance center possessed its own non-compatible computerized registration system for households, which operated independently from the centers in other districts and functioned according to proprietary protocols. Across all districts, households receiving targeted assistance due to poverty were subject to registration. Such households were classified as "impoverished," consequently designating all adults (aged 18 and above) within such households as "impoverished adults," and all children (aged 0–18) residing in such households as "impoverished children." In four districts, it was feasible to establish the structure of impoverished households based on the age of their members. In one district, only the overall number of impoverished household members could be ascertained. Therefore, for Lodz as well, it was only possible to determine the general count of members within impoverished households. The threshold of impoverishment, delineated by income criteria warranting eligibility for targeted social assistance, was at that time defined by the magnitude of the lowest pension.

from households which were supported by social assistance among the total number of children in a given district was higher than the proportion of adults from such households among the total number of adults in that district. Thus, the poverty rate among children in the Bałuty district was 27.5% and among adults 11%, in Górna 34.1%, and 16% among adults, in Polesie district 22.7% and 11%, in Widzew 27.2% and 11% (Warzywoda-Kruszyńska 1999: 143). Furthermore, these studies revealed that children have a larger proportion of people living in poor households than in the general population of a given district. Therefore, they concluded that during the transformation period, there was a phenomenon of juvenilisation of poverty in Lodz, i.e., an overrepresentation of children in the population of the poor and the greatest risk of poverty among children than adults.

In the quarters of streets where the child poverty rate exceeded 30%, 57% of all children lived in Górna, and as many as 72% of poor children from that district, in Bałuty respectively: 36% and 51%, in Polesie – 30% and 48%, and in Widzew – 28% and 43%. In the four districts combined (no relevant data are available for Śródmieście), 58,305 children lived in areas of high concentration of poor children in the last decade of the 20th century (Warzywoda-Kruszyńska 1999: 147).

Warzywoda-Kruszyńska (2009: 112–113) identified the following reasons for the under-recognition of child poverty during the transition period:

1. There is an ideological dispute regarding whether the support should be directed at a family (understood rather as a traditional nuclear family consisting of spouses and their common offspring) or individuals (e.g., children, women). This dispute is reflected by changing in the ruling coalition social institutions (e.g., Family Affairs Office v. Gender Equality Affairs) and government programmes (e.g., special allowance for large families v. child nutrition programme).
2. A common notion is to consider a family as an undifferentiated entity in which the interests of all members are harmonious and resources are shared accordingly...
3. Children are perceived as the “cause” of poverty rather than its victims. The object of interest is rather “poverty caused by children” than “child poverty”, understood as a kind of biographical experience.
4. It is poorly recognized that experiencing poverty in childhood results in later life, as it occurs during the formative period of a life cycle. Talents and opportunities wasted due to poverty cannot be compensated for.
5. It is not clearly defined whose competence “poor children” should fall within: school, which deals with “challenging” students, students with “special educational needs” but not with “poor children”; social assistance centers, which focus on adult clients, accompanied by a child or from whom a child must be separated because of not being provided by appropriate childcare, but not solely on children. Thus, the children are “nobody’s children”.
6. The attention of the political elite is focused on “urgent” issues, and “important” issues are postponed until they become “urgent”. Child poverty does not fall into the category of “urgent” matters, even though it is time-sensitive. Its consequences will only manifest later on in the form of unused human capital and burdens on the state budget. However, by that time other will be in power and someone else will have to take care of those adults who will be unable to support themselves.
7. Child poverty is a politically sensitive topic. Its existence, which cannot be justified by the lifestyle of the victims themselves, threatens the image of the democratic state and its agendas

(including local government structures) as an authority catering to all its citizens, especially the vulnerable ones. Therefore, it is better not to “raise the issue of poverty”, as one of the politicians stated.

8. Also it is not insignificant that there is no “definite”, “indisputable” knowledge regarding the extent of poverty in general and the extent of child poverty in particular. Various pieces of information are published, based on different indicators. This creates a sense of confusion among politicians, especially at the local level, and a lack of belief in the accuracy of results...

Revealed firstly in Lodz, the “social cost” of transformation as the juvenilisation of poverty was later confirmed on the basis of data collected by the Social Welfare Department of the Ministry of Labor and Social Policy for the year 2001. It turned out that among the population supported by social assistance (i.e., those living below the statutory poverty line), children and adolescents (0–17 years of age) constituted 44 per cent, whereas this age category was represented only by 24 per cent among the citizens of Poland (Warzywoda-Kruszyńska, Grotowska-Leder 2002).

Among the impoverished population, a child or adolescent could be encountered nearly twice as often as among the general population of Poland. The phenomenon of juvenilisation of poverty was present in all voivodeships of our country, although with uneven intensity. Similarly, among people with incomes below the subsistence minimum, meaning at the threshold of meeting any biological needs, almost every second person was aged 0–18 (Daszyńska 2002).

The UNICEF report *Child Poverty in Rich Countries* (2005) revealed that in Poland in the 1990s, the extent of child poverty surged the most among the European Union member states. The consequences of experiencing poverty and neglect during childhood become apparent only years later, mainly in the form of unused human capital. Investing in children, as it was demonstrated by the results of analyses conducted by a team under the direction of James Heckman, the 2002 Nobel Prize laureate in Economics, brings the highest rate of return (Cuhna, Heckaman 2010). However, during the times of great change children and their living conditions did not seem significant.

#### 4. Conclusion

Lodz was severely affected during the economic transition period. The unemployment rate was unprecedented and incomparable to other large cities in Poland. Child poverty became apparent, posing a threat of intergenerational transmission of poverty in later years and the continuation of social inequalities. As a result of the lack of a central government support programmes, the city had to independently address its economic and social issues, revealing a high extent of entrepreneurship among the inhabitants. However, nowadays, according to the data from the national census, Lodz, which was the second largest city in Poland in terms of the population in 1980s, has now become the fourth most populous city in Poland, after Warsaw, Krakow, and Wroclaw. In terms of average investment

expenditure per capita in voivodship cities in the years of 2018–2020, it held the eighteenth and nineteenth position<sup>8</sup> (Świeniewicz, Łukomska 2021: 32). Thanks to funds from the European Union, the city is changing its appearance, however, traces of dissolved enterprises can still be spotted in the inner city. Large manufacturing companies have foreign owners. Due to the favorable geographical location in the center of Poland, in the areas adjacent to Lodz transport companies and freight handling facilities have been located.

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<sup>8</sup> In Poland, there are sixteen voivodeships, yet there are eighteen voivodeship cities, as two voivodeships each encompass two voivodeship cities: Kuyavian-Pomeranian Voivodeship, with Bydgoszcz and Toruń, as well as Lubusz Voivodeship, with Zielona Góra and Gorzów Wielkopolski.



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## HAVE SPECIAL ECONOMIC ZONES CONTRIBUTED TO REGIONAL DISPARITIES IN POLAND?

**Abstract.** The main objective of the paper is to present the performance of special economic zones (SEZs) by province over 25 years of their operation and their role in reducing regional economic disparities. SEZs were created with the aim to mitigate the unemployment problem revealed by the transformation of the Polish economy. It was hoped that, thanks to investment incentives, capital would flow primarily to the regions most affected by the transformation. However, these intentions failed to receive statutory protection. As a result, SEZ investments could be found in southern, central and western Poland, i.e., they were scattered across almost the entire country. Only the eastern, poorest voivodeships enjoyed significantly less interest. This was a consequence of the ownership structure of capital because the zones were clearly dominated by foreign investors. The Polish Investment Zone, the successor to the SEZs, brought some changes in this respect. Simple statistical analyses suggest that, contrary to assumptions, the SEZs have not contributed to the reduction in regional disparities measured by GDP per capita, and may even have increased them. Resolving this question would require more in-depth research.

**Keywords:** special economic zones, zone management company, investment, regional disparities, voivodeships.

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## CZY SPECJALNE STREFY EKONOMICZNE PRZYCZYNIŁY SIĘ DO ZRÓŻNICOWANIA REGIONALNEGO W POLSCE?

**Abstrakt.** Głównym celem artykułu jest zaprezentowanie wyników specjalnych stref ekonomicznych (SSE) w układzie wojewódzkim osiągniętych w ciągu 25 lat działalności oraz ich roli w ograniczaniu regionalnych nierówności gospodarczych. SSE utworzono z myślą, aby łagodzić trudności związane z bezrobociem, które ujawniła transformacja polskiej gospodarki. Liczono, że dzięki zachętom inwestycyjnym kapitał napłynie przede wszystkim do regionów najbardziej dotkniętych zmianami. Intencje te nie znalazły jednak ustawowego zabezpieczenia. W efekcie inwestycje strefowe koncentrowały się w południowej, centralnej i zachodniej Polsce, czyli znalazły się na terenie niemal całego kraju. Tylko wschodnie, najbiedniejsze województwa cieszyły się wyraźnie mniejszym zainteresowaniem. Było ono pochodną struktury własnościowej kapitału. W strefach zdecydowanie dominowali bowiem inwestorzy zagraniczni. Pewne zmiany w tym zakresie przyniosła Polska Strefa Inwestycji, następczyni SSE. Proste analizy statystyczne sugerują, że, wbrew założeniom, strefy nie przyczyniły się do zmniejszenia regionalnych dysproporcji mierzonych poziomem PKB na mieszkańca, a nawet mogły oddziaływać w kierunku ich wzrostu. Rozstrzygnięcie tej kwestii wymagałoby bardziej pogłębionych badań.

**Słowa kluczowe:** specjalne strefy ekonomiczne, spółka zarządzająca strefą, inwestycje, dysproporcje regionalne, województwa.

### 1. Introduction

Special economic zones (SEZs) were established in Poland on the basis of the Act of 20 October 1994 (Dz.U. [Journal of Laws] of 1994, No. 123, item 600). Between 1995 and 1997, 17 zones were established, which were to operate no longer than until 2017. In 2001, as a result of an amendment to the Act of 1994, several changes were made, including the decisions to phase out some zones and to merge others. As a result, fourteen SEZs remained operational.

Special economic zones were intended to counteract the regional economic, social and territorial disparities revealed by the market transformation of the Polish economy. However, these intentions failed to be reflected in the Act (Act of 1994) and, as a result, subzones were created in all voivodeships, both in the better and less developed ones. The areas of some zones have been developed to a small extent, while others have steadily expanded. Reasons for these differences include the location of the zones. For obvious reasons, those located in richer and better developed, and therefore more attractive for business, parts of Poland performed better.

In addition to location factors, the investment attractiveness of SEZs was influenced by endogenous considerations related to the characteristics of the specific zone, such as its area, the availability of infrastructure and the degree of development of the investment areas. Efforts made by the zone management company (ZMC) to provide efficient services to investors also played an important role (Dorożyński, Świerkocki, Dobrowolska 2021).

Changes in the economy induced by the SEZs can be considered at different levels. Like in other developed economies, in Poland effects at regional and local levels have been crucial.<sup>1</sup> Researchers focused on effects to counties (e.g., Jensen, Winiarczyk 2014) and municipalities (e.g., Jensen 2018). Voivodeships attracted much less attention (one of the exceptions is Ambroziak 2015) as in these large administrative units SEZ investments play a relatively minor role which often escapes statistical analyses.

Therefore, our first goal is to show SEZ performance by voivodeships over 25 years of their history.<sup>2</sup> For that purpose we used data made available for the study by the Special Economic Zones Unit of the Ministry of Development<sup>3</sup> and other sources, mainly the *Report(s) on the implementation of the Special Economic Zones Act* published annually by the Minister of Economy. Secondly, we seek to find out whether SEZ investment positively contributed to reducing economic disparities between voivodeships in Poland.<sup>4</sup>

The text is organized as follows. We start with a short presentation of SEZs as an investment policy instrument (section 2). Then we discuss in detail the presence of SEZs in regions (voivodeships). Section 4 contains a brief information on Polish Investment Zone – a successor of SEZs. In section 5 we analyse the relationship between investment outlays in SEZs in a regional perspective and GDP per capita. The last section contains conclusions.

## 2. The concept of special economic zones

There are many more or less elaborate formal definitions of a special economic zone adopted by different jurisdictions. Leaving aside the legislative details, for analytical purposes, a zone can be defined as “a geographically delimited area within which a government facilitates economic activity through fiscal and regulatory incentives and infrastructure support” (World Investment Report 2019: 128). UNCTAD considers the legal regime to be the most important distinctive feature and pre-condition included in this definition. This condition is fulfilled by special economic zones in Poland, which, although not distinguished geographically as a compact area, are separate administrative and legal entities (by virtue of the Act of 1994).

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<sup>1</sup> Numerous studies in this respect do not allow us to draw unambiguously positive conclusions (see Dorożyński, Świerkocki 2022: Chapter 3), in which they concur with what has been concluded by foreign authors (e.g. Crane et al. 2018; Hornok, Raeskyesa 2023).

<sup>2</sup> The text (parts 2–4) draws extensively from (Dorożyński, Świerkocki 2022).

<sup>3</sup> Department of Investment Development, Ministry of Development as at 31 December 2019.

<sup>4</sup> Inspiration for taking a closer look at the SEZs from a regional perspective came, inter alia, from our collaboration with **Professor Paweł Starosta** on the research project entitled *Human and Social Capital as Development Factors of the Łódź Region* completed in 2012.

Investing in Polish SEZs provides entrepreneurs with a number of benefits, but is also associated with various costs. Neither of these two categories has fundamentally changed since Poland negotiated the terms of its EU accession. However, the need to adopt the EU state aid rules has weakened the strength of previous preferences (Ministry of Economy and Labour 2005). A summary of the incentives and constraints making up the costs of entry into the zone is provided in Table 1.

**Table 1.** Incentives and limitations in SEZs

Incentives	Constraints
Exemption from income tax	Obtaining an investment permit
Developed investment plots	Minimum thresholds for employment, investment value, and own equity share
Technical infrastructure	Current charges for using the services offered by the SEZ
Organisational and legal assistance when starting a business	Minimum period of stay in the SEZ (3–5 years)
Possible exemption from commercial property tax and certain other charges (granted by local and regional authorities)	Repayment of aid received (with interest) if the conditions of the authorisation are not fulfilled
	Ban on production relocation from the European Economic Area countries

Source: authors' research.

Investors consider corporate and personal income tax exemptions from part of their activities within the zone to be the most important incentive (KPMG 2014). The basis for calculating the amount of the CIT exemption, the major part of the fiscal support, is the value of the capital expenditure incurred (chosen by the vast majority of investors) or the two-year actual cost of hiring new employees. The exemption applies after the start of operations, as profits are made, until the amount due is exhausted.

The second incentive is developed investment areas, usually in attractive locations, which the investor can purchase or lease at a favourable price through competitive tendering. The plots are developed by the zones themselves, i.e., by their management companies and at their cost, or by local government units and other entities (e.g. GDDKiA (ZMCs) – General Directorate for National Roads and Highways).

A third incentive is access to ready technical infrastructure (equipment and transmission networks) within the zone. The fourth is ZMC's assistance in legal and organisational matters related to starting up the business, as well as possible cooperation in the search for employees or business partners. A fifth incentive may be commercial property tax exemptions, however, their possible granting rests in the discretion of the municipality hosting the zone, not the ZMC.

### 3. SEZ investments in voivodeships

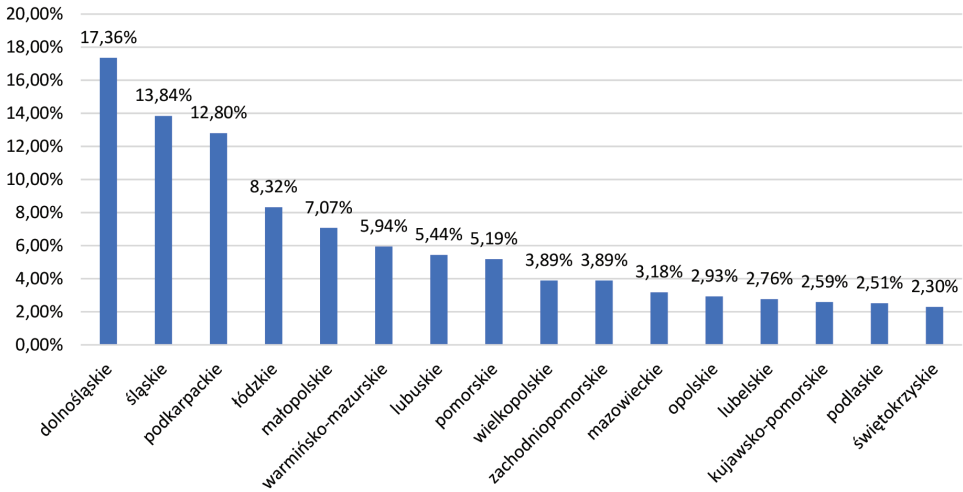
Special economic zones in Poland are geographically dispersed. At the end of 2019, they covered investment areas of a total area of 22,949.5 hectares, located in 186 cities and 311 municipalities. This means that zone areas could be found in one in five Polish cities and one in eight municipalities.

Typically, the subzones and investment plots of one zone are scattered across several voivodeships and a dozen or even several dozen counties, often several hundred kilometres away. At the top of the list is the Tarnobrzeg SEZ, whose investment areas can be found in as many as six regions. The Starachowice, Mielec, and Pomorska SEZs have plots in five voivodeships. When it comes to counties, the Katowice (33), Pomeranian (30), and Kostrzyń-Slubice (26) SEZs cover the biggest number of those. Only three SEZs operated in an area smaller than 10 counties.

Two voivodeships, Wielkopolskie and Mazowieckie, proved to be the most attractive for investors. In response to investors' demand, as many as five SEZs decided to locate their investment plots in these two regions, although none of them had their headquarters (zone management companies) there. Dolnośląskie and Lubelskie voivodeships were only slightly less popular (4 SEZs in each region).

The uneven regional distribution of SEZ investment in the regions is evidenced by statistics on the number of valid permits, the value of investment outlays and the number of jobs created. In terms of the number of valid permits, Dolnośląskie voivodeship emerged as an undisputed leader (Figure 1) with over 17% of all permits granted there. Nearly 80% of them were granted to entities with foreign capital. Two more voivodeships, Śląskie and Podkarpackie, recorded more than 10% of all valid permits, 13.84% and 12.80%, respectively. In the latter, most permits were granted to domestic investors (almost 64%). In total, these three regions accounted for as much as 44% of all valid SEZ permits in Poland. On the other hand, five voivodeships with the smallest share accounted in total for only 13% of permits. The largest share of permits granted to foreign investors was recorded in the Dolnośląskie (79.5%), Lubuskie (66%), Opolskie (64%), Śląskie (63%), and Łódzkie (60%) voivodeships. Domestic entities clearly dominated in the eastern part of the country.

Since the SEZs started operating until the end of 2019, the cumulative value of total investment outlays (made by domestic and foreign investors) incurred in them reached almost PLN 132 billion. Nearly 1/4 of capital expenditures fell on the Dolnośląskie voivodeship. The top three was completed by Śląskie (15.10%) and Łódzkie (11.11%). Thus, only these three regions attracted almost half of the value of all SEZ investments in Poland (Figure 2). Worth noting is that the latter two hosted investment areas of almost exclusively one SEZ (Katowice SEZ and Łódź SEZ, respectively). This may mean that the success of these two regions in attracting SEZ investment can be largely attributed to their management companies.



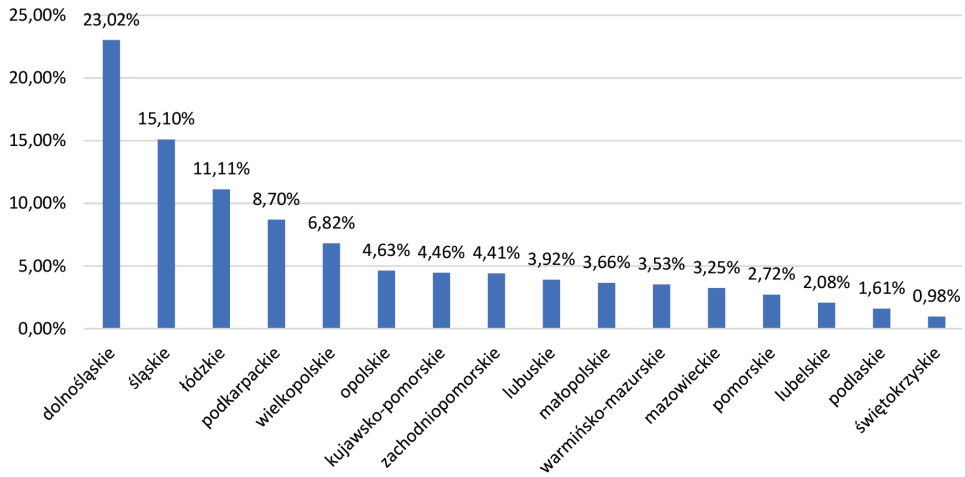
**Figure 1.** The share of voivodships in the total number of permits granted in SEZs (as at 31.12.2019)

Source: authors' research based on data prepared by the Special Economic Zones Division, Department of Investment Development of the Ministry of Development.

Voivodships at the top of the ranking by the value of investment outlays attracted mainly foreign investors. The undisputed leader in this ranking was again Dolnośląskie, where the share of the value of investment outlays made by businesses with foreign capital was 96.85%. A relatively high indicator, exceeding or close to the average for the whole country (76.57%), was recorded in most of the voivodships of western and central Poland: Opolskie (89.15%), Wielkopolskie (87.13%), Śląskie (84.31%), as well as in Pomorskie (76.94%), and Łódzkie (76.51%). Domestic enterprises invested the most in the eastern and southern parts of the country.

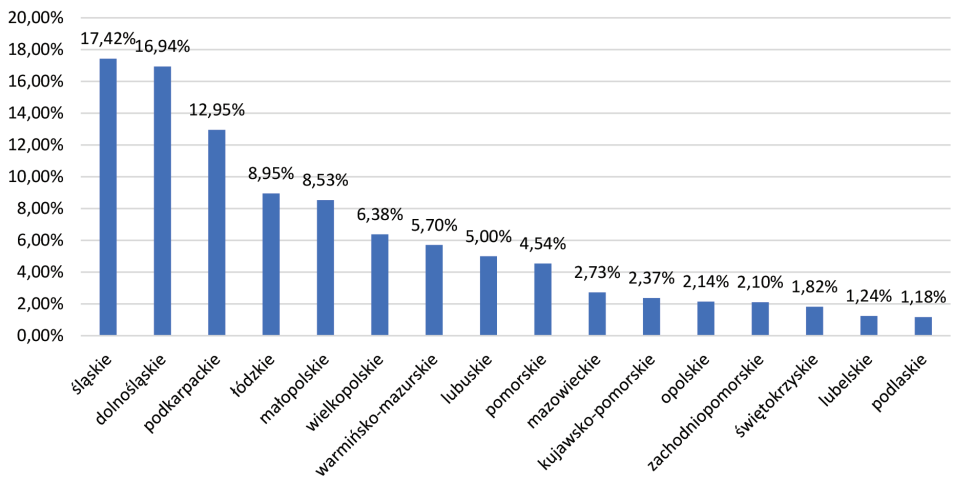
Nearly half of the almost four hundred thousand jobs in SEZs were created in only three voivodships, i.e., Śląskie (17.42%), Dolnośląskie (16.94%), and Podkarpackie (12.95%) (see Figure 3). Foreign investors were instrumental in each of them as their share reached, respectively, 93%, 85% and 64% of total jobs in subzones located in these regions.

In voivodships where domestic entrepreneurs prevailed, SEZ investments did not generate such employment outcomes. In the five regions with the highest share of Polish companies (Lubelskie, Podlaskie, Świętokrzyskie, Małopolskie, and Mazowieckie), only 15.5% of all SEZ jobs were created.



**Figure 2.** The share of voivodeships in total investment outlays in SEZs (as at 31.12.2019)

Source: see Figure 1.

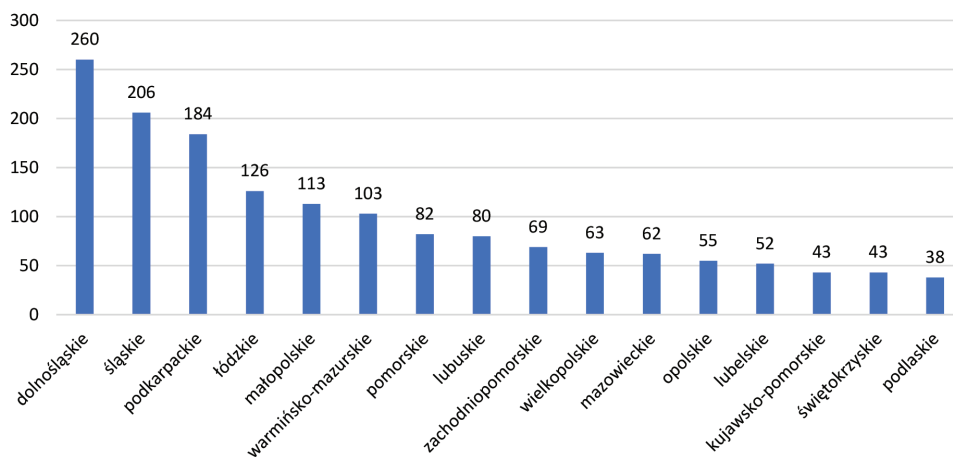


**Figure 3.** Share of voivodeships in the total number of jobs created in SEZs (as at 31.12.2019)

Source: see Figure 1.

A total of 1,579 companies have invested in the 14 SEZs. Most investments were located in the Dolnośląskie (260), Śląskie (206), and Podkarpackie (184) voivodeships. 63% of the total business population in SEZs were concentrated in six regions (Figure 4).

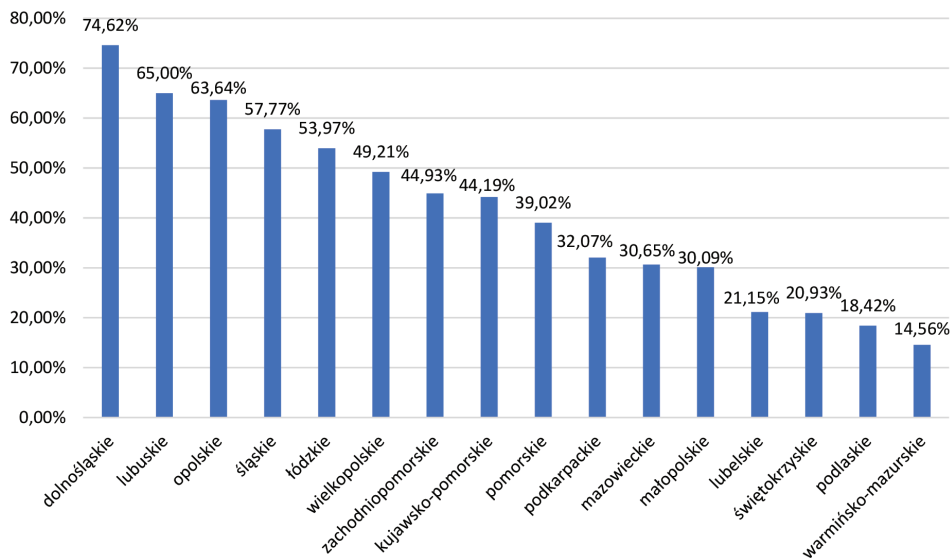




**Figure 4.** Domestic and foreign companies in SEZs in 16 voivodeships (as at 31.12.2019)

Source: see Figure 1.

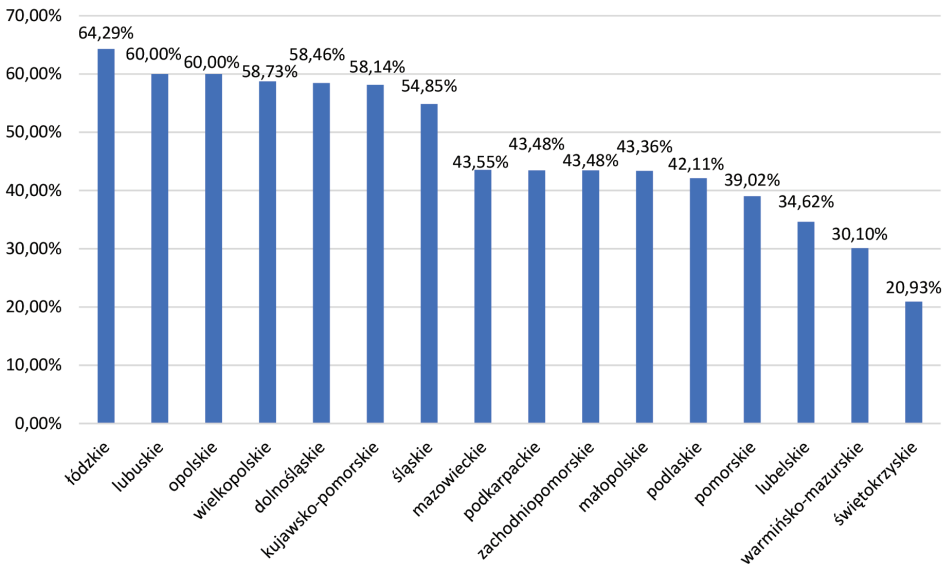
In terms of the number of enterprises, voivodeships in south-western and central Poland attracted the greatest interest of foreign investors (Figure 5). A share of over fifty per cent was recorded in the Dolnośląskie, Lubuskie, Opolskie, Śląskie, and Łódzkie regions. The picture was similar to the previously presented share of foreign companies in the number of valid zone permits.



**Figure 5.** Share of foreign companies in the total population of businesses in SEZs in all 16 voivodeships (as at 31.12.2019)

Source: see Figure 1.

In seven voivodeships large enterprises dominated among SEZ investors. Relatively most of them chose Łódzkie voivodeship as a location for their business. Their share in the total number of domestic and foreign investors there exceeded 64%. Large investors usually prevailed in regions where the highest investment outlays were made by enterprises with foreign capital. These were regions in the western, south-western and central parts of the country (see Figure 6).



**Figure 6.** Share of large (domestic and foreign) enterprises in the total population of businesses in SEZs (as at 31.12.2019)

Source: see Figure 1.

The regions were also quite diverse in terms of leading industries among SEZ investors. However, some regularities can be observed if we make a distinction according to the origin of capital. Among foreign investors, there is a clear dominance of the automotive industry. Companies with foreign capital invested the biggest amounts in motor vehicle production (section 29)<sup>5</sup> in as many as seven regions located mainly in the western and southern parts of the country. In the Pomorskie and Kujawsko-Pomorskie voivodeships, foreign investors incurred the greatest outlays on the production of paper and paper products (section 17), in the Łódzkie and Lubelskie voivodeships on the production of fabricated metal equipment (section 25), and in the Podlaskie and Zachodniopomorskie voivodeships on the production of rubber and plastic products (section 22).

<sup>5</sup> Polish Classification of Goods and Services.

When it comes to domestic investors, sectoral concentration is less evident, although even here regional champions can be identified. In four voivodeships in southern and north-western Poland (Śląskie, Małopolskie, Pomorskie, and Zachodniopomorskie), SEZ investments are dominated by the manufacture of fabricated metal equipment (section 25). In the Mazovia region and in two regions in eastern Poland (Lubelskie and Warmińsko-Mazurskie voivodeships), domestic companies invested most in the production of food and food products (section 10). In the two voivodeships of western Poland, i.e., Lubuskie and Opolskie, the leading sector among Polish companies was the automotive industry (section 29). The Podkarpackie and Podlaskie voivodeships were dominated by manufacturers of wood products (section 16), while in central Poland (the Łódzkie and Świętokrzyskie voivodeships), domestic producers of other non-metallic mineral products (section 23) led the way.

In summary, the voivodeships in the west and south of Poland were dominated by the automotive industry. In the east, the main investors were wood product manufacturers and food and grocery producers. Northern Poland was mainly marked by the production of machinery and equipment, rubber and plastic products, as well as paper and paper products. The central part of the country attracted, among others, manufacturers of finished appliances, computers, electronic and optical products, and other non-metallic mineral products.

#### 4. Polish Investment Zone

The Act of 20 October 1994 on Special Economic Zones is to remain in force until the end of 2026, but only for permits issued before 30 June 2018,<sup>6</sup> i.e., before the entry into force of the Act of 10 May 2018 on supporting new investments, which established the so-called Polish Investment Zone (*Polska Strefa Inwestycji* – PSI). Thus, decisions on support (instead of permits) are now issued by SEZ management companies solely on the basis of the new law that stipulates the criteria and forms of investment support in Poland.<sup>7</sup>

At present, the SEZ management companies (ZMCs) operate within their respective territorial competence set out in the implementing regulation to the Act.<sup>8</sup> Each management company has areas assigned to it, i.e., groups of counties (and cities with county status), in which they may carry out their operations and offer business support services to entrepreneurs.<sup>9</sup> The number of counties within the area

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<sup>6</sup> With regard to amendment, withdrawal, annulment or expiry of the permit.

<sup>7</sup> Act of 10 May 2018 on supporting new investments (Dz.U. [Journal of Laws] of 2018, item 1162).

<sup>8</sup> Regulation of the Minister for Entrepreneurship and Technology of 29 August 2018 on the delimitation of territories and territorial competence of managing entities, Dz.U. RP [Journal of Laws of the Republic of Poland] of 4 September 2018, item 1698.

<sup>9</sup> For the purposes of the analysis discussed in this paper, we have assumed that in the new legal framework the commonly used names of special economic zones correspond to the territories

varies greatly depending on the company. For example, the Legnica SEZ manages only 9 counties and the Kamienna Góra SEZ manages 11. At the opposite end of the spectrum are companies coordinating investments in at least several dozen counties, e.g., the Łódź SEZ – 45, the Katowice SEZ – 42, the Kostrzyń-Słubice SEZ – 40.

In the first period of the PSI (2018–2019), the Śląskie Voivodeship was the leader of investment outlays, with entrepreneurs declaring projects worth over PLN 3.31 billion. Four more regions in southern and central Poland were at the top, i.e., Małopolska (PLN 2.48 billion), Opolskie (PLN 1.89 billion), Dolnośląskie (PLN 1.88 billion), and Łódzkie (PLN 1.84 billion). The total share of these five regions in the declared value of total investment outlays was almost 55%. In four voivodships (except Małopolska), higher outlays were declared by foreign investors. In Dolny Śląsk this proportion exceeded fifteen times the value of domestic investments. On the other extreme were voivodships from the eastern and north-eastern parts of the country (Warmińsko-Mazurskie PLN 0.57 billion, Świętokrzyskie PLN 0.24 billion, Podlaskie PLN 0.18 billion, Pomorskie PLN 0.62 billion, and Mazowieckie PLN 0.81 billion), where the value of investments did not exceed PLN 1 billion. In terms of value (declared investment outlays) and quantity (number of investment projects), domestic companies definitely dominated there.

Interesting conclusions can be drawn from comparing the rankings of voivodships by the value of investments in SEZs and under the Act of 2018 on supporting new investments (Table 2). In both cases, regions situated in southern, central and western Poland proved to be the most attractive for investors. These were mainly voivodships where companies with foreign capital were in the lead (among SEZ investors) (e.g., Dolnośląskie, Śląskie, Łódzkie). An exception were two regions, i.e., Małopolska and Podkarpackie, which owed their relatively high positions in the rankings mainly to domestic companies.<sup>10</sup>

**Table 2.** Ranking of voivodships by total investment value in SEZ and PSI (as at 31 December 2019)

No.	Voivodeship	Share of voivodships in total investment outlays in SEZ	No.	Voivodeship	Share of voivodships in total investment outlays in PSI
1	2	3	4	5	6
1	Dolnośląskie	23.02	1	Śląskie	15.85
2	Śląskie	15.10	2	Małopolskie	11.86

(i.e., groups of counties) where the tasks under the Act on supporting new investments are performed. On the other hand, the companies managing SEZs in the Polish Investment Zone Programme were defined as area managers, i.e., entities performing the tasks set out in the Act.

<sup>10</sup> At the bottom of both rankings there are voivodships from the eastern, north-east, and northern parts of the country. Most of them are the poorest regions of Poland, i.e., Lubelskie, Warmińsko-Mazurskie, Podlaskie, and Świętokrzyskie (50%, 50%, 52%, and 52% GDP per capita, respectively, PPS, EU27 = 100, 2019, EUROSTAT).

**Table 2** (cont.)

1	2	3	4	5	6
3	Łódzkie	11.11	3	Opolskie	9.08
4	Podkarpackie	8.70	4	Dolnośląskie	8.98
5	Wielkopolskie	6.82	5	Łódzkie	8.81
6	Opolskie	4.63	6	Wielkopolskie	8.07
7	Kujawsko-Pomorskie	4.46	7	Podkarpackie	6.67
8	Zachodniopomorskie	4.41	8	Kujawsko-Pomorskie	5.32
9	Lubuskie	3.92	9	Zachodniopomorskie	4.98
10	Małopolskie	3.66	10	Lubelskie	4.89
11	Warmińsko-Mazurskie	3.53	11	Lubuskie	3.98
12	Mazowieckie	3.25	12	Mazowieckie	3.88
13	Pomorskie	2.72	13	Pomorskie	2.94
14	Lubelskie	2.08	14	Warmińsko-Mazurskie	2.71
15	Podlaskie	1.61	15	Świętokrzyskie	1.15
16	Świętokrzyskie	0.98	16	Podlaskie	0.84

Source: see Figure 1.

## 5. Inflow of SEZ investments and regional disparities

Statistical data suggest that between 2002 and 2020,<sup>11</sup> i.e., when 14 SEZs were in operation, disparities between voivodeships measured with average GDP per capita and gross fixed assets in the manufacturing sector decreased while differences in unemployment rate slightly deepened (Table 3).

The average value of GDP per capita in the voivodeships in 2020 compared to 2002 increased by 178%. The differentiation was small (the coefficient of variation did not exceed 21%) and decreased by 6 percentage points, i.e., by more than one-fourth. Over the same period, the average gross value of fixed assets in manufacturing increased threefold. The disparity was relatively large (coefficients of variation amounted to 71% in 2004 and 63% in 2020) but they also decreased (by 8 pp, i.e., by more than one-tenth). The average unemployment rate in the voivodeships in Poland between 2002 and 2020 decreased by nearly 13 pp, which represented a reduction by as much as 64%. The variation was small, although, contrary to the two other indicators, it increased by 2.24 pp in the period under review (less than one tenth). On the whole, we can conclude that regional disparities were reduced between 2002 and 2020.

<sup>11</sup> We chose 2020 (instead of 2019) as the final year because we assumed that investments in SEZs bear fruits with at least a yearly delay.

**Table 3.** Selected indicators for voivodeships over the period 2002–2020

Voivodeship	GDP per capita (PLN, current prices)		Gross fixed assets in manufacturing (in thousands of PLN, current prices)		Unemployment rate (%)	
	2002	2020	2004 (a)	2020	2002	2020
Dolnośląskie	21,193	67,104	22,526,595	97,842,566	22.4	5.6
Kujawsko-Pomorskie	18,635	50,246	15,520,469	44,678,493	22.5	9.0
Lubelskie	14,300	42,370	6,201,444	23,096,005	15.7	8.2
Lubuskie	17,850	50,209	6,898,842	23,735,645	26.0	6.3
Łódzkie	18,492	59,529	16,216,317	51,289,756	18.4	6.2
Małopolskie	17,659	55,138	18,328,342	59,771,651	13.8	5.3
Mazowieckie	31,115	53,288	42,393,512	61,185,256	13.8	5.2
Opolskie	16,738	48,834	6,623,473	24,840,364	19.4	6.9
Podkarpackie	14,569	42,501	12,461,540	41,892,279	16.9	9.1
Podlaskie	15,719	45,345	4,872,515	17,776,796	15.1	7.8
Pomorskie	20,346	57,680	12,953,706	47,552,713	21.3	5.9
Śląskie	22,627	61,641	39,558,971	126,574,131	16.5	4.9
Świętokrzyskie	15,977	44,789	8,281,784	21,848,070	18.5	8.5
Warmińsko- -Mazurskie	15,528	43,662	7,067,526	24,313,024	28.9	10.2
Wielkopolskie	21,072	66,499	29,837,945	92,093,548	15.9	3.7
Zachodniopomorskie	20,196	51,790	7,571,254	25,174,569	26.6	8.4
Min.	14,300	42,370	4,872,515	17,776,796	13.8	3.7
Max.	31,115	67,104	42,393,512	126,574,131	28.9	10.2
Mean	18,876	52,539.06	16,082,139.69	48,979,054.1	19.48125	6.95
Standard deviation	3,986.992	7,874.941	11,494,849.38	31,007,697.5	4.5509915	1.7790447
Vs	21%	15%	71%	63%	23, 36%	25.60%

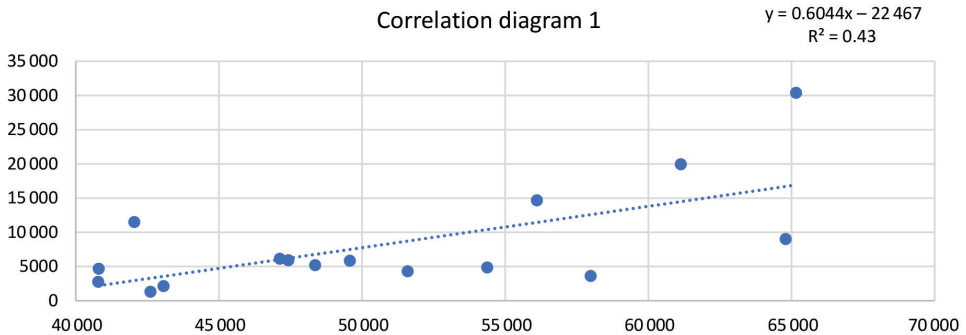
(a) Data for 2002 was not available.

Source: authors' own research based on data from Statistics Poland.

SEZs should have had some influence on these processes. Indeed, a statistically significant relationship can be observed between the level of regional growth measured by GDP per capita and the value of capital expenditures in SEZs on a regional basis (at the end of 2019). The correlation diagram 1 (Fig. 7a) and the low value of the coefficient of determination ( $R^2$ ) indicate that the relationship between the studied characteristics is curvilinear. Thus, Spearman's rank correlation coefficient was used to assess the relationship between the variables. Its value (0.547) suggests that there is a moderate positive correlation and means that investments

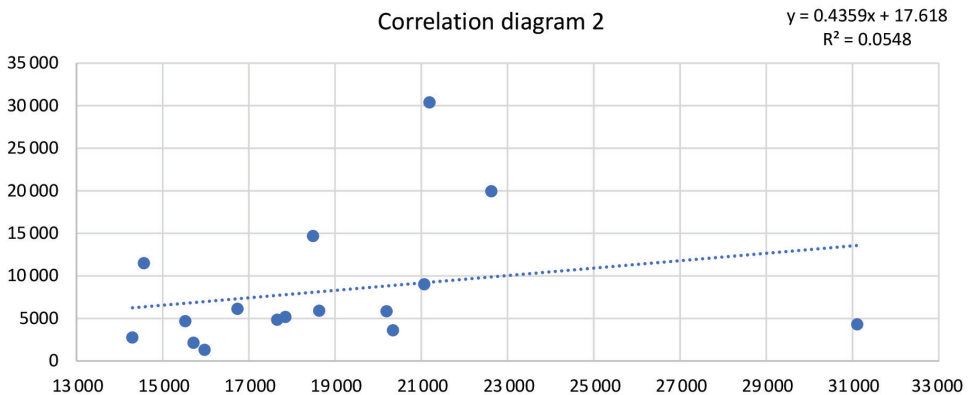
flowed mainly into SEZs based in the richest voivodeships. In contrast, the value of this coefficient for 2002 was lower, at 0.415 (Fig. 7b), showing weaker but still positive correlation between the variables.

This confirms the conclusion that the capital was not accumulated in the poorest voivodeships that initially were supposed to benefit the most from SEZ policy. Therefore it can be argued that SEZs probably did not contribute to declining regional disparities or might even act as factor that was increasing them. Clarifying this matter would require further, more detailed research. In particular, attention would need to be paid to the changes that SEZ investments have caused in their surroundings, i.e., in the economies of the host voivodeships.



**Figure 7a.** Relationship between investment outlays in SEZs at a regional perspective and GDP per capita (at the end of 2019)

Source: authors' research based on data of the Statistics Poland.



**Figure 7b.** Relationship between investment outlays in SEZs at a regional perspective and GDP per capita (at the end of 2002)

Source: authors' research based on data of the Statistics Poland.

## 6. Conclusion

The investments that flowed into the special economic zones could be found in southern, central and western Poland, i.e., they were scattered across almost the entire country. Nonetheless the leaders were Dolnośląskie and Śląskie, both characterized by above average GDP levels per capita in 2002. Śląskie kept its advantage and Dolnośląskie increased it significantly in 2020.

However, the economically weakest voivodeships should have been the main beneficiaries of this policy. Yet, this did not happen. It was mainly due to a low foreign investors' interest in choosing such locations. As a result, the zones probably failed to contribute to reducing the disparities between voivodeships in the level of development inherited from the command economy.


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## SIX THEOREMS OF THE SOCIAL DISINTEGRATION THEORY

**Abstract.** In the article the author's own theoretical view, intended to describe the specificity and condition of contemporary society, is presented. The approach discussed in the paper refers to the functionalist tradition in sociology, emphasizing the systemic nature of such social entities as society. At the same time, the conventional premise of functionalism regarding the cohesive nature of social systems is rejected here. Accordingly, the theoretical approach proposed is called social disintegration theory. Six theorems of this theory are introduced and discussed in the paper.

**Keywords:** social system, society, social evolution, globalization, social disintegration theory.

## SZEŚĆ TWIERDZEŃ TEORII DEZINTEGRACJI SPOŁECZNEJ

**Abstrakt.** Artykuł prezentuje własną propozycję teoretyczną autora, stanowiącą próbę opisu specyfiki i kondycji współczesnego społeczeństwa. Prezentowane w pracy podejście nawiązuje do tradycji myśli funkcjonalnej w socjologii, akcentując systemiczny charakter takich całości społecznych, jak społeczeństwo. Zarazem konwencjonalna przesłanka funkcjonalizmu dotycząca zbornego charakteru systemów społecznych jest tu odrzucana. W związku z tym, proponowane podejście teoretyczne jest tu nazywane teorią dezintegracji społecznej. W artykule wprowadzonych i omówionych zostało sześć twierdzeń tej teorii.

**Słowa kluczowe:** system społeczny, społeczeństwo, ewolucja społeczna, globalizacja, teoria dezintegracji społecznej.

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## 1. Introduction

In 1992, under the auspices of the Union of Concerned Scientists, the “World Scientists’ Warning to Humanity” was published, signed by more than 1,700 researchers, including the majority of living Nobel Prize laureates in the sciences. The document stresses that human activities are conflicting with the demands of the environment, which is rapidly degrading, and must eventually lead to the collapse of humanity itself. It pointed out the need for changes in the way the Earth and life on it are managed. The following threat factors were listed: depletion of the ozone layer, declining availability of fresh water, depletion of marine life, dead zones of the oceans, decline of forest cover, destruction of biodiversity, climate change and continued growth of the human population (Ripple et al. 2017). After 25 years, a second version of the warning was presented, which was signed by 15364 scientists from around the world. They stated that in a quarter of a century, humanity has achieved virtually no achievements in improving the mentioned indicators. Conversely, data on – on a global scale – CO<sub>2</sub> emissions, freshwater resources, forest area, vertebrate species richness, etc., showed a continued rate of regression (Ripple et al. 2017).

This leads to the question of why there has been essentially no improvement, and whether it can be assumed that the appeals of scientists have simply been ignored? To answer the latter doubt, someone might deny it and recall the European Green Deal, an action plan designed to allow Europe to become a climate-neutral continent by 2050. As part of the Deal, the European Parliament recently passed a European Climate Law raising the target for reducing greenhouse gas emissions to at least 55% by 2030 (from the previously planned 40%). In the face of these steps, however, one can raise the objection that the planned efforts are nevertheless too slow and affect only a small percentage of the global population. They are therefore inadequate in the face of the threat, while appropriate global action is lacking.

Ewa Bińczyk (2013: 57–63) indicates the successes of the propaganda of denial and ordered production of doubt and ignorance about climate warming. This refers to the activities of experts, think tanks, scientific institutes, consulting companies and public relations agencies, which professionally engage in maintaining public belief in the harmlessness of selected products or solutions (so-called product defense industry). In this case, it would be about denying the fact of climate change and the threat of environmental catastrophe. But were the warnings of scientists indeed ignored, as the public and policymakers gave credence to cynical denialists?

A valid option to consider is that the changes advocated by the scientists (which include eliminating fossil fuels and fully shifting to renewable energy sources, switching to mainly plant-based diets, abandoning the idea of unlimited economic growth and unlimited consumption in favor of a green economy, and gradually reducing the world’s population through educational efforts and promoting unsolicited family planning) (Ripple et al. 2021) were too radical to be realistic to implement.

Such a high level of coordination and causation would have been needed here, and fundamental change would have been required in so many different spheres of human life (which at the same time would have compromised the interests of so many groups), that working out any effects was unlikely, despite the dramatic nature of the subsequent warnings. The work presented here, however, is not about environmental threats, but aims at a more general social reflection. The issue of possible environmental catastrophe is only a case in point.

Geoffrey Godbey, examining the specificity and condition of post-industrial society, states (1990: 33): “Our society is characterized by new costs of coordination. As society becomes more complex, as we become more interdependent, and as our ability to harm each other increases, planning and regulating our society becomes more important and more difficult”. However, as Paweł Starosta (2005: 123) notes, “globalization also brings with it a process of deinstitutionalization, expressed mainly in the diminishing role of the nation-state, the family, bureaucratically organized labor structures, and social service institutions (...) Deinstitutionalization does not mean the disappearance of formal bureaucratic and hierarchical structures, established during industrialization and forming the basis of public life, nor of institutions based on tradition. Rather, the process is characterized by the gradual reduction of their leading role in meeting needs and exercising real power over social behavior, and the increasing participation of impermanent rules and norms in regulating human actions” [own translation]. Thus, on the one hand, we are dealing with an increasing demand for control and coordination of activities in an increasingly complex (and globalizing) world, while on the other hand, we could speak of a weakening of the structures previously in charge of carrying out this task.

Anthony Giddens (2006: 96–97) has articulated the conviction that humanity is facing the need for a global governance system to meet the risks and challenges of globalization. This would be the most reasonable option considering the scale of global interdependence and the rapid pace of change we are not only witnessing, but also experiencing. Giddens pointed to the European Union and the United Nations as encouraging examples. At the same time, he stated that new forms of international governance could usher in a new, more righteous and secure cosmopolitan order. He concluded his remarks by asserting that subordinating the social world to our will is not beyond our capabilities. On the contrary, it should be a task that in the 21st century becomes the supreme necessity and the greatest challenge facing societies (Giddens 2006: 97). The work presented here is based on fundamental doubts under such optimism. I would like to present my own theoretical view later in the text. First, however, some terminological settlements must be made.

## 2. Terminological settlements

In this study, I would like to refer to the functionalist tradition in sociology in a critical and non-committal way. The key terms will therefore be: social system, subsystem, society and global society.

So I assume – following George Ritzer (2011: 479) – that the category of “system” is best and most accurately applied simply to society as a whole (although it can also be used to describe other communities as well). Ritzer also cites Bernard Barber, who goes even further and argues that the idea of a social system should even be limited to collectivities such as societies. According to the dictionary definition, a “society is a group of people, who share a common culture, occupy a particular territorial area, and feel themselves to constitute a unified and distinct entity” (Marshall 1996: 498). Talcott Parsons, identifying the social system as the object of his interest, cited such characteristics of the system as self-sufficiency, biological reproduction and socialization of new generations. As he proposed, “a social system of this type, which meets all the essential function prerequisites of long term persistence from within its own resources, will be called society” (Parsons 1952: 19). So when “society” is referred to in the text, it will refer to a social system, primarily national societies with a state organization.

Global society, on the other hand, is a product of globalization, i.e. a process in which “social relations acquire relatively distanceless and borderless qualities, so that human lives are increasingly played out in the world as a single place” (Scholte 1999: 14 after Al-Rodhan, Stoudmann 2006: 13). At the same time, it is important to keep in mind that globalization “encompasses the causes, course, and consequences of transnational and transcultural integration of human and non-human activities” (Al-Rodhan, Stoudmann 2006: 5). A global society would thus be characterized by all the features of society in general, but on the scale of the entire earthly universe.

I assume that subsystems are distinguishable “sections” of society, its components, themselves being certain entities. These entities are recognized, as distinguishable, by the social actors who take systematic or incidental actions within them. This recognition is fostered not only by the nomenclature peculiar to each subsystem, but above all by the particularity of the “rules of the game” and the criteria and conditions for effective action within them. The very possibility of action within the subsystems can be rationed, and therefore limited to individuals or groups that meet certain criteria. Thus, we can distinguish, for example, the education subsystem, the economic subsystem, the cultural subsystem, the information (media) subsystem, the medical subsystem, the military subsystem, the physical culture subsystem, the subsystem of political organization of society, etc.

Parsons himself distinguished four chief subsystems: economic, political, social and cultural subsystems, which were supposed to correspond to the requirements of the whole system, referred to by the acronym AGIL: Adaptation, Goal attainment,

Integration and Latent pattern maintenance (Parsons 1971; Ritzer 2011: 479–480). On the other hand, however, Parsons was inclined to recognize that the centuries-old process of social evolution, bringing with it an increase in the complexity of the social organism, implies at the same time a multiplication of social subsystems (Ritzer 2011: 483–484; see also Sztompka 2005: 122–124). Thus, it seems that he, too, would be willing to relate the category of subsystem not only to the aforementioned fixed four elements, but also to accept the solution proposed here, according to which within these subsystems the constituent elements can be separated.

### 3. Six theorems of the social disintegration theory

With the above dictionary at my disposal, I would like to present a certain theoretical approach – let's call it the theory of social disintegration – that describes the constitution of contemporary society. This approach consists of the following six theorems, which I will try to clarify and justify later in the study.

1. **The autonomy theorem.** Contemporary societies are characterized by a significant degree of autonomy of the components, the performance of which remains the result of internal logic and dynamics rather than being the result of the requirements of the whole system.
2. **The historicity theorem.** The low level of integration of subsystems with the requirements of the entire social system is not an persistent feature of social life, but rather remains an effect of social evolution.
3. **The non-factual subordination theorem.** The subsystems remain formally subordinated to central control, and the façade statement that their action should be in harmony with the requirements of the social whole or simply serve important social goals is not seriously challenged.
4. **The rationality theorem.** Rational actors (individual or collective) within a subsystem are oriented toward maximizing their own benefits (material and immaterial gains, securing positions, etc.) and leveling risks and reducing inputs (time, energy, etc.). In doing so, they are either free (subject only to the most general social norms), or their actions are subordinated to actors higher up in the hierarchy, to whom they must give an account of their undertakings. In this case, their actions are organized in accordance with the rigor of accountability, but control is generally inept.
5. **The linkage theorem.** The operations of particular subsystems affect the performance of the other components of the social system. Thus, no subsystem exists in a social vacuum, but on the contrary, its condition remains the result of certain social circumstances, and the actions of the actors involved in this field affect other subsystems and the social whole.
6. **The uncontrollability theorem.** In view of the expanding autonomy of subsystems, and as a result of the progressive social evolution meaning the

complexity of the system increases, the system actually loses its ability to operate effectively and achieve its goals. Progressive disintegration means that goals that were once viable are now located out of reach.

Let's take a closer look at these six theorems. The autonomy theorem stands in obvious opposition to the functionalist tradition, which assumes the existence of social *order*. It should be noted that the mechanism of working out market equilibrium has been described in liberal economics with reference to the metaphor of the "invisible hand". In the case of sociological analyses from the field of functionalism, such arrangements are absent. Recall that the classics of functionalism, such as Émile Durkheim and Alfred Radcliffe-Brown, even warned against the trap of teleologism in functional analysis, that is, explaining the function of specific elements through the purposes they are supposed to serve for the benefit of the social whole (Turner, Maryanski 1979: 17–18, 40–44). As Jonathan H. Turner points out, such a way of thinking is not necessarily invalid, but it would be necessary to demonstrate how the social system was programmed, engineered (Turner 2004: 14–15).

However, the autonomy theorem is not just a denial of the functionalist belief in a self-creating and reproducing social order. It also goes beyond the criticism of functionalism from conflict theory, represented, for example, by Ralf Dahrendorf, who advocated focusing analytical attention around concepts such as conflict or change, treating Parsons' model of an integrated and static society as inadequate. The theorem, then, is not about the fact that life in contemporary societies is full of tension, injustice or competition for limited resources. It goes more to emphasize that the operation of various social subsystems is not as integrated as the functionalists assumed. The subsystems are characterized by a considerable degree of freedom, "living their own lives", which with the needs of the whole system may not necessarily have much in common. This does not mean that they are isolated from each other (see the linkage theorem).

This theorem may bring to mind the diagnosis of Daniel Bell, who proclaimed the autonomy of the techno-economic, polity and cultural structures of modern societies. These structures are supposed to be determined by various regulative modes that organize action; thus, rigor of economizing, idea of equality and desire for self-expression, respectively (Bell 1978: 10–13). In Bell's view, contradictions arise between these structures, which creates tensions and conflicts. The autonomy theorem is less radical: it tells not so much about antinomies as about lack of coordination.

Let's point out that the autonomy theorem seems to completely bypass the trap of teleologism. While order requires an explanation (in simple terms, it is a matter of answering the question: *who cleaned up?*), disorder can be considered an understandable result of uncoupled forces.

The historicity theorem, on the other hand, tells us that this lack of social cohesiveness characterizes developed and evolutionarily advanced societies rather than societies in general. In fact, this thesis is not new. It has already been reported by

social neo-evolutionists such as Leslie White, who describes culture as an adaptive mechanism by which the human species adapts to natural environment, mainly by harnessing natural sources of energy and using them to satisfy human needs (Sztompka 2005: 117). Thus, culture has a biological basis, but once it arises, it gains a certain autonomy; it has its own life, momentum and evolves according to its own mechanisms and regularities (Sztompka 2005: 117). It should be emphasized that, according to White, the later dynamics of culture can no longer be interpreted as a response to external challenges. The key to the evolution of culture can be found in culture itself (Sztompka 2005: 117). Thus, culture in a historical perspective emancipates itself, i.e. loses its close connection to the requirements of the social whole. A similar idea is contained in Anthony Smith's commentary made at the address of Julian Steward's neo-evolutionary considerations (Sztompka 2005: 117–119). Smith argues that the natural environment and techno-economic factors (so, for example, the level of development of technology) determine culture especially in the early stages of evolution (a high level of system congruence is maintained at that time), while a much greater share of determining factors of a political or ideological nature is allowed in later stages. The form of government, religion or art can acquire a more autonomous figure (Sztompka 2005: 119). The autonomy of subsystems (and consequently, the incongruity of the whole) would thus be a product of history.

The historicity theorem would accept some neo-evolutionary theses, such as Parsons' view that socio-cultural evolution means differentiation from simple to progressively more complex forms. This means advancing specialization, an increasingly sophisticated division of labor and a multiplication of social subsystems. However, it is doubtful that the original level of social congruence will be maintained. Even if the rationale for the emergence of new subsystems (on the basis of the division of subsystems already in place) is their higher specialization, and thus more efficient operation and better response to changing circumstances (as Parsons argues), it seems possible that the level of harmonization of the new subsystem with the requirements of the whole (which Parsons analyzes by describing the mechanism of inclusion) may vary and change over time. It is possible that, over time, the new subsystem begins to be characterized by a peculiarity of interests and an orientation toward autonomy.

The historicity theorem would explain that functionalistically oriented cultural anthropologists like Bronisław Malinowski were not under illusion. The communities they investigated could indeed be cohesive entities. However, the level of integration of the social system is reduced in the course of social evolution. Globalization would represent the next stage here: a shift from differentiation within social systems (as Parsons wrote about) to the merging of increasingly complex and intricate social wholes to produce a new quality (i.e., global society) characterized by structural complexity on an unprecedented scale.

On the other hand, the non-factual subordination theorem informs us that social subsystems within the traditionally understood social system (such as the



medical subsystem, the educational subsystem or the narrowly defined cultural subsystem) remain under the control of other specialized subsystems, including, in particular, the supervision of the political subsystem, which should, it is assumed, ensure their functionality. The non-factual subordination theorem, however, tells us that this vassalage does not violate the actual autonomy of the subsystems. Indeed, the control exercised over their functioning is not effective. It is worth recalling here Jan Lutyński's concept of apparent activities, which are defined as undertakings officially considered important for the realization of some socially important goal, but which in fact do not fulfill this goal and actors implementing these actions are aware – but publicly not externalizing it – of this. Thus, a sufficient rationale for the existence of apparent activities is the mere attribution to them of a role in achieving a given goal. Their real function, therefore, always lies in their existence, although this existence may be in a residual form, merely formal (Lutyński 1990: 107). Lutyński distinguished four mechanisms that cause apparent activities: the organizational and decision-making mechanism, the axiological mechanism, the mechanism of compulsory implementation of fanciful decrees, and the supposedly pragmatic mechanism (Lutyński 1990: 108–114). It should be strongly emphasized that although Lutyński's inspiration for formulating the concept of apparent activities came from observations of the system of real socialism, the author himself was strongly convinced that apparent activities and the mechanisms causing them are temporally and spatially unlimited, even if their intensity may depend on the era or country under consideration (Lutyński 1990: 108). Lutyński's concept shows how controls and orders – that within a given subsystem, may be considered fanciful or (more importantly from the point of view of the considerations carried out here) detrimental to the interests of the group – can be evaded.

This is because the rationality theorem, based on the premises of rational choice theory, tells us that actors – both individual and collective – operating within a given subsystem are guided primarily by profit and loss calculations. The perspective of the well-being of the social whole is not very much interesting to them. It seems more important and realistic to estimate whether the action taken will bring certain profits (e.g. in terms of power, money, prestige) or whether, for example, it will mean a threat to the position already achieved, and with what costs (in terms of effort, finances) it will be associated. It is the reckoning of self-interest that will determine the course of action. Thus, if insistence from the controlling subsystem is perceived as threatening interests, the result will be actions of an apparent nature in Lutyński's sense.

This can be fostered by group loyalty (identities within the subsystem) and specific group socialization (involving action patterns, ethos, etc.). The so-called "besieged fortress syndrome" will serve perfectly here; the perception of one's own group as threatened by external, hostile powers not only consolidates it, but can also promote the justification, "whitewashing" of various non-normative actions undertaken by its members.

I would like to emphasize that the orientation to own interests will also apply to the managers of the system (if the representatives of the political subsystem could be considered as such). They will construct their own actions and the actions of subordinate structures in such a way as to bring them maximum profits and secure their positions. Even if the needs (and therefore functional requirements) of the entire system (with its complex structure) were recognizable to them, it is clear that they do not need to organize their undertakings.

The fifth theorem is the linkage theorem. This is a well-known claim, derived directly from the functionalist tradition. According to it, there is a network of interrelationships between the various subsystems. The functioning of these subsystems affects other components of the social whole.

Functionalists generally assumed that the operation of subsystems is somehow in harmony with each other (although the problem here is the teleological trap mentioned above). The one who was perhaps most concerned with the problematic nature of this issue was Robert K. Merton. Commenting on his proposed algorithm (the so-called paradigm) for functional analysis in sociology, he stressed that one misunderstanding of the concept of function is the tendency to limit sociological observations to the positive contribution made by a phenomenon to the cultural or social system. Meanwhile, the observed consequences can be, Merton pointed out, either positive (functional), negative (dysfunctional and therefore lessening adaptation or adjustment of the system) or neutral (non-functional) (Merton 1968: 105). Thus, he explicitly rejected the conventional postulate of universal functionalism, according to which all solid and sustained social and cultural forms have positive functions.

The functionalist tradition explains that the various components of a social system have certain relationships with each other (they are interrelated, i.e. interdependent), and their action is integrated (they are harmonized). In this study, I argue for accepting the first premise while rejecting the other one.

#### **4. Final remarks**

In conclusion, I assume that the various social subsystems are characterized today by a significant degree of autonomy. Their performance is therefore non-integrated, which does not mean isolated. On the contrary, the subsystems influence each other (if only by acquiring resources to the detriment of other subsystems and limiting the spectrum of their activities). Actors involved in the subsystems make rational choices and calculate the costs and profits of their actions in the short and long term. Their actions, rational and egoistic, are unrelated to the requirements of the social whole. The structure of the system itself continues to become more complex (as a result of social evolution), which is further compounded by integration with other systems (globalization).

It seems that Parsons's optimism, according to which, in the course of social evolution, the multiplication of subsystems (division, specialization) should raise the level of readiness of the system for ever new adaptive challenges, may have been undue. It is worth considering whether it is not the case that a highly complex system, which includes actually autonomous (though not isolated) elements, is not at the same time a system that loses controllability. This would be a system facing fundamental difficulties in formulating commonly accepted goals and achieving them by enforcing appropriate actions on the part of the components. This is stated in the last theorem, the uncontrollability theorem.

Perhaps as a certain test (in Popperian mode) for the theoretical view reported here we can consider facing the adaptive challenge in the form of the threat of environmental catastrophe. Will social systems (integrating in the course of globalization into a kind of super-system) be able to meet this challenge by planning and enforcing changes in the functioning of the economy, the family, lifestyles and consumption? I wish that my diagnosis of the ineptitude, incongruity and inefficiency of social systems would prove fundamentally inadequate.

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## RUSTICA NOVA. THE NEW COUNTRYSIDE IN HUNGARY AT THE TURN OF THE MILLENNIUM

**Abstract.** This paper comprehensively presents the complex transformation of rural Hungary after the turn of the millennium. The post-socialist land re-privatization provided land to more than 2 million families, but by the time of EU accession (2004) a highly concentrated large estate structure had already developed. The number of the village population decreased somewhat, but its proportion remained high at around one-third, together with rural towns people 50% in Hungarian society. Despite the surviving and hybrid structures, depeasantization, the disappearance of the traditional peasantry, took place, as a result of tourism, the new type of town-village relations, the cultural reinterpretation of the countryside and its traditions began, but the social disadvantages are still more strongly concentrated in the villages than in the cities.

**Keywords:** depeasantization, land reform, community, traditions, hybridity, cultural re-definition.

## RUSTICA NOVA. NOWA WIEŚ NA WĘGRZECH NA PRZEŁOMIE TYSIĄCLECI

**Abstrakt.** Artykuł stanowi kompleksowe spojrzenie na złożoną transformację obszarów wiejskich na Węgrzech na przełomie tysiącleci. Postsocjalistyczna reprivatyzacja gruntów zapewniła ziemię ponad 2 milionom rodzin, ale do czasu przystąpienia do UE (2004 r.) rozwinęła się już wysoce skoncentrowana struktura dużych posiadłości. Populacja wiejska, w społeczeństwie węgierskim, nieco się zmniejszyła, ale jej odsetek pozostał wysoki na poziomie około jednej trzeciej, a wraz z mieszkańcami miast wiejskich na poziomie 50%. Pomimo zachowanych i hybrydowych struktur nastąpił zanik tradycyjnego chłopstwa, a w wyniku turystyki powstał nowy rodzaj relacji między

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miastem a wsią. Rozpoczęła się kulturowa reinterpretacja wsi i jej tradycji. Mimo to niekorzystne warunki społeczne nadal silniej koncentrują się na wsiach niż w miastach.

**Słowa kluczowe:** depesntyzacja, reforma rolna, społeczność, tradycje, hybrydyzacja, redefinicja kulturowa.

In the decade before and after the turn of the millennium, rural society was affected by the effects of a complete transformation. This period was historically unique in that the consequences of three processes, each of which had a profound impact, were simultaneously taking shape. The final stage of the decline of the rural peasantry coincided with the dismantling of the socialist system and with globalization and European integration, which corresponded to three structural changes. As a result of the total restructuring, radically new processes were set in motion in rural society. “New” is not a normative term here. In the Hungarian countryside today, the social, political and environmental deficits of the triple structural change are at least as great as the positive benefits. The term “new countryside” is used merely to denote the fact that changes are significant in all essential dimensions of rural structures. The diversity of systems of regeneration, economy and power, the variety of actors and their interests, their networks, their values and their courses of action, have created a fragmented social structure. By fragmented structure, I refer to the coexistence of phenomena that are not necessarily linked to each other. One feature of the “new countryside” is the hybrid nature of society and economy. Hybridity is a structural condition, not a synonym for transitionality. It is equally present in the economy, society, politics and spatial structure. The systems and subsystems of market, state/social and quasi-market, project-based redistribution cross and, thereby, block each other. Further research can clarify the essence of this new order of social redistribution. It is certain that, at present, redistributive systems or project-based forms of quasi-market resource allocation are more relevant to rural society than the market. This form of hybridity cannot be sustained at all, or only with very serious consequences and at the cost of an even greater loss of rural influence. The largest percentage of the rural population is employed in services. Even the number of people in industrial occupations is higher than in agriculture. Work in services and industry is largely commuting. A growing share of services is in demand by urban dwellers. A mixed farm structure – large farms, family small and medium-sized farms and part-time small farms – may persist in agriculture despite the concentration of production. The mixed farm structure that emerged at the turn of the 19th and 20th centuries is a long-standing feature of Hungarian agriculture. Political decisions have repeatedly attempted to abolish certain forms of mixed farming. The land distribution of 1945 was intended to eliminate the large farm, the organization of producer cooperatives (1959–1962) the small farm, and the period of land compensation (1991–1993) the large farm again. The mixed

factory structure was revived after each political intervention. The last decade has favored the concentration of farms, but the land use and structural role of family farms has also stabilized. In times of general economic crisis, partial food self-sufficiency can be a family strategy to mitigate losses. The middle and upper middle-class demand for “healthy”, “clean source”, traditional or organic food may also make part-time production on their own land/garden more popular. The decline of the largest social group in rural society in the 19th and 20th centuries, the peasantry, was complete by the new millennium. The importance of agriculture is a fraction of what it was two decades earlier. No group of agricultural producers can be identified as peasants according to the definitions of the historical category. Changes in the agrarian structure are breaking up the (orderly) elements of peasant behaviour and mentality that survive under socialism. In large farms and family farms, there has been a market shift in production/sales and work culture that was never complete in the 19th and 20th centuries. The peculiarities of the peasant household economy and production described by Tchayanov, the lack of specialization, the necessity of constant workload and the high degree of self-sufficiency, are not at all applicable to today’s full-time farmers. Rural poverty retains much more of the elements of the former middle and small peasantry’s strategies of regeneration. However, the strategies of poverty avoidance or survival cannot be identified with the survival of peasant qualities and structures. The link between urban and rural society is considerably more intense than in the past, due to mobility, the explosion in the technical conditions of telecommunications and the increased demand of urban consumers for rural goods and services. The “interlocking” of urban and rural structures is an essential element of rural hybridity. The countryside is increasingly a place of consumption rather than production. The demand of urban (and foreign) consumers is rewriting the supply of rural producers and service providers. The dynamic growth of nature reserves and the recreational needs of urban dwellers; tourism to resorts, waterfronts, forests and mountains; the demand for traditional food and wine; the second (rural) homes or permanent settlement of urban dwellers in villages; the convergence of rural upper and middle-class values with urban norms; the mass daily encounter of commuters with the city; as well as the influence of the media all work towards the dissolution of the former rural/urban dichotomy. The rural economy is diversifying as a result of the decline in the importance of agricultural production and new values and directions for development (Ángyán 2012, 2014; Pataki et al. 2011). Rural diversification is interpreted by Dezső Kovács as covering the following types of activities: rural tourism, recreational services, value-added activities (selling local food); use of additional buildings/other resources, production of non-traditional agricultural products (Kovács D. 2003a). Rural catering is an important economic activity in some districts and its importance in this respect is that it connects settlements far from the main holiday areas to tourism. Slightly more than half of the nights spent in rural tourism are spent in destinations other than known tourist



destinations. In 1998, according to HCSO data, there were 4,893 rural inns with 26,340 beds and 431,272 nights spent. By 2004, the number of inns had increased to 7,431, the number of beds to 44,364 and the number of nights spent to 495,637. By 2009, there were no changes in the number of hosts, but the number of guest nights increased to 722,000. According to Dezső Kovács's calculations based on municipal registrations, the number of hosts (6,000 in 2000) and nights spent (500,000 nights) is also higher (Kovács D. 2003a). The spread of organic farming can also be seen as a sign of diversification. In 2000, the number of organic farms was only 741, covering 47,200 hectares. By 2001, the area cultivated had increased to 79,000 hectares (Kürthy 2002). By 2004, the number of organic farmers had increased to 1,420 and the area cultivated by them to 128,690 hectares, according to the Organic Farming Control Agency. After 2004, organic farming slightly decreased. In 2009, 2.5% of the arable land was involved in organic farming and the number of producers had increased to 1,800. The share of land under environmental protection increased by one-third between 1991 and 2011 to 892,000 ha (HCSO data). Environmental and sustainability projects create new connections, transform social capital and the use of knowledge forms and can also contribute to the diversification of economic activity (Kelemen, Megyesi 2007). In many municipalities, the feasibility of sustainability projects that aim at local knowledge, the use of local natural resources, food self-reliance and the empowerment of local communities is questionable due to changes in social and economic structures and a lack of confidence (Lányi 2009). Nevertheless, they are an alternative that can create new types of activities, especially in disadvantaged areas, in forms that are separate from larger sectors of the rural economy. It is an unfortunate feature of Hungarian (and Central European) development that the decline of agriculture and the historical peasantry has not been followed by a decline in the rural population. The rural space in Hungary and Central Europe is overpopulated and full of social conflicts, which justifies the elaboration of specific development paradigms.

Peasant culture was considered a source of national culture in both the 19th and 20th centuries. Rurality was an integral part of national image and symbols (Kovách 2001; Csizse, Kovách 2002). Rural depopulation and the related structural reforms of the millennium are not isolated social changes; they have a strong impact on the most diverse groups of Hungarian society, on post-socialist and postmodern national symbols and images (Kovách 2007; Csurgó 2007). The loss of cultural tradition is the most prominent element of rural depopulation. In the social regeneration of late socialism, the economic accumulation of individuals and families was subordinated to consumption goals, which, together with the loss of function of the institutions of peasant society, led directly to the erosion of the values and traditions of the historical peasantry. The institutions of peasant society, the community control over the values, behaviour and habits of individuals, finally gave way in the 1990s to the values of the consumer society, effectively mediated by globalization. The

disintegration of the communities of the historical peasantry began in the 19th century, but was not completed under the socialist system. The values and behavioural patterns of local societies were subject to strong community control until around the turn of the millennium. Community control, dress, consumption, greetings, mourning or celebration in their obligatory, albeit not medieval or unchangeable, forms, were a means of protecting against the dangers of the outside world and minimizing risk. Community control survived the abolition of its economic base, private property, and for a long time the rural population could count on a world of values and norms governed by community control to offer some protection, at least a sense of belonging and common destiny. This was the most important force that held rural societies together in a time of weakening social organization by extended families, churches, schools and other institutions. I believe that the final disintegration of the forms of community control that were historically linked to the peasantry occurred in the 1990s. International research reports that rural communities are far from being lifeless (Starosta 1998; Starosta, Draganova 1999), but in Hungary they are a new system of relations with weak personal and institutional links to the communities of the historical peasantry. Research on contemporary rural communities is one of the great debts of rural studies. One of the reasons for this may be that the last twenty years have been a transitional period in all respects, and research has focused mainly on structural changes. There is relatively little information available on the community organization of local societies. Kotics (2007), in his paper on community research, mentions only one work on rural communities in the present (Borsos et al. 1999). There are many descriptions and data published on rural settlements, but hardly any on community organization and community values (Váradi 1997; Kovács É. 2007). In a period of reorganization, individual strategies may be more successful, and a lack of trust, a decrease in cooperativeness and individualisation may have weakened even the (relatively) closer unity of small communities that used to depend on each other. Studying community is probably not only a debt of rural science. Research in other countries of Central and Eastern Europe shows that local communities are far from dead. Paweł Starosta organized an international comparative study of local communities around the turn of the millennium (Starosta 1998; Starosta, Draganova 1999). Starosta used empirical sociological research tools to examine the functioning of local communities in Poland and Bulgaria. It was found that the community can play an integrative role in the organization of local societies. Instead of community, Starosta proposes the concept of social bonding to study the organization of post-socialist local societies. In his view, the strength of belonging, the absence or existence of a bond, does not depend on the size or composition of the population, but on the extent to which the infrastructure of a given locality is equipped and the conditions are appropriate to the needs of the population. Moral attachment, shaped not by tradition or proximity but by individual values, is a local capital that can contribute to the development of communities. The need for security is also an essential component of rural

societies in transition. In Hungarian local communities, new social bonds are more difficult to form. The fact that, due to rapid and radical privatisation and market transition, social differences in Hungarian rural society were already much greater in the first half of the 1990s than in Czech, Polish, Slovak, Bulgarian and Russian villages (Csíste, Kovách 1995; Kovách 1994), certainly plays a significant role in this. Mónika Váradi (2007) clearly identifies the reasons for the disturbed community relations. Most of the larger landowners of the new era were not from local communities. The potential leadership of the villages is not linked to the locals by ties of belonging. There was no real model group for the new social bond. Land auctions and elections, or, in short, political interference, led to the emergence of strong local conflicts. Judit Tímár (2007) links the changing function of the community to the changing position of gender in society. Men are losing their traditional gender roles, which included representing the family and participating in community affairs, which women are not taking on as their burden of caring for the family has increased. According to Rita Glózer (2007), the erosion of public life is a major obstacle to community formation. Successful local communities are usually coupled with the performance of a charismatic leader, which poses a risk because a change of person eliminates the most important condition for community success. The creation of new social bonds, as Starosta warns (1998), has to do with the development of the municipality. Bernadett Csurgó (2013) identified new ways of creating social ties in successful peri-urban settlements. For some of the displaced urbanites, a stable value is the experience of belonging to a community and it is also one of the aims of moving out of cities. They are able to connect with local people, actively participate in community building and create new social bonds. According to High and Nemes (2007), EU development programmes in particular offer effective forms of community building.

Two major subtypes of social organization of rural space have emerged. The society of deprived regions is diversified not by urban consumption, but by a large mass of dependants. The regenerating regions, which are in intensive material and intellectual exchange with the cities, are at a greater social and mental distance from the declining settlements than from the cities. The idyllic/critical elements of rural images in the media have shifted towards a more negative perception. Urban consumers, on the other hand, are reshaping the image of the countryside, placing the idyllic features that appeal to them, forgetting the more sombre elements of rural reality. Local societies are reviving and recreating local traditions as a cultural reclaiming of their locality. A small-scale cultural revival is taking place in most villages and small towns. European integration provides access to new resources. Grassroots development projects, notably LEADER, are redefining the power relations in local arenas of power. The project-based approach to development leads to the emergence of new, mostly skilled and young groups of actors (the project department and intermediary actors) with a strong interest in successful rural development. Their development activities and interests are currently the only

chance for the development of the depressed municipalities. The highly mixed nature of rural society and the interplay of interests in local multi-stakeholder politics make the adoption of new governance principles and the application of governance techniques the greatest challenge for the coming years.

There are few traditions from the world of the historical peasantry that have survived the second half of the 20th century and strongly link the present to the past, but at the same time we are witnessing a certain rural cultural revival. The dance house movement remains vibrant and popular). We are learning how to prepare old and new dishes, wine culture has been revived, the State Folk Ensemble is “re-designing” folk songs and dances, local elites have found legitimacy for their power in the process of recreating local traditions, monuments and memorials are being cleaned up and new ones erected, the tourism industry is recreating rural values (Kovács D. 2003a, 2003b). Rural images have been given an economic function in the new system of regional and rural development. The competition for development resources encourages local elites to create new discursive strategies and images (Kovách 2002). The planning and expert elites, the influential actors in rural development, can assert their power in the process of cultural re-design of the countryside. In everyday speech, the meaning of “rural” and “peasant” is devalued, but the consumer classes that come into contact with the countryside, tourists and other visitors discover its rural values and treasures (Kovács D. 2003a). Household economic pluriactivity, which was the economic strategy of the middle-classes, is increasingly being adopted by urban dwellers, who are becoming more understanding of peasant and rural history. New rural traditions are being invented and recreated. What might be the cultural consequences of the rural depopulation of the countryside if the intimate link between the past and the present, and even more so with the future, is broken? In the late industrialized regions of Europe (Granberg, Kovách, Tovey 2001), the creation of modern nations was effectively linked to peasant traditions. The loss of tradition in Scandinavia, Ireland and the Mediterranean countries was an organic process compared to what happened in Hungary. The creation of modernity involved peasants and post-peasants and met their interests. In Hungary (and in Central and Eastern Europe), the loss of tradition and the creation of tradition are ongoing, but so far outsiders, rural elite groups, settlers, and expert classes have been more active in the cultural redefinition of the countryside than the descendants of peasants still living in rural settlements.

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