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SOCIAL CONSTRUCTION OF THE RURAL ENVIRONMENT – EUROPE AND THE NATIONAL DISCOURSES IN FRANCE, GERMANY AND PORTUGAL¹

SOCIÁLNÍ KONSTRUKCE RURÁLNÍHO PROSTŘEDÍ – EVROPA A NÁRODNÍ ROZPRAVY VE FRANCII, NĚMECKU A PORTUGALSKU

J.-P. Billaud^{*}, K. Bruckmeier^{**}, T. Patricio^{***}, F. Pinton^{****2}

^{*} *CNRS Nanterre, France*, ^{**} *Katalyse Institute, Cologne, Germany*, ^{***} *CIES-ISCTE Lisbon, Portugal*, ^{****} *Université Paris X, France*

ABSTRACT: At present, initial phases of a global transition to sustainability the concept of sustainable development is a political postulate that has begun to influence the social discourse on rural economy, agriculture, nature and landscape. A reframing of this discourse can be observed. In western Europe the growing influence of the EU in this process has led to unexpected changes in the social discourse at national levels. This paper resulted from a research project funded by the European Commission, which analyses the agri-environmental measures of the 1992 CAP-reform in France, Germany and Portugal. Using these measures as an example, the changing styles and structures of social perception, construction and evaluation of the rural environment are compared.

EU, CAP-reform, social perception, rural environment

ABSTRAKT: V současné počáteční fázi globálního přechodu k trvalé udržitelnosti je koncepce trvale udržitelného rozvoje politickým postulátem, jenž začal ovlivňovat společenské rozpravy týkající se rurální ekonomiky, zemědělství, přírody a krajiny. Je možno sledovat přeformování těchto rozprav. V západní Evropě vedl rostoucí vliv EU v tomto procesu k neočekávaným změnám ve společenských rozpravách na národní úrovni. Tato práce vychází z výzkumného projektu financovaného Evropskou komisí, který analyzuje opatření reformy Společné zemědělské politiky z r. 1992, týkající se vlivu zemědělství na životní prostředí, ve Francii, Německu a Portugalsku. S využitím příkladu těchto opatření jsou porovnávány měnící se styly a struktury sociální percepcie a tvorba a hodnocení rurálního životního prostředí.

EU, reforma Společné zemědělské politiky, sociální percepcie, rurální životní prostředí

INTRODUCTION

The European Union is partly a political order and partly a social system. The common market and the supra-national political order do not represent the kind of autonomy or self-organization capacities that constitute a theoretical criterion for states and societies.³

Nevertheless, this emerging European order of new quality, through its interaction with national political

and societal systems, influences social discourse shaped in national or regional cultural traditions and, up to now, based on them. For example, the Common Agricultural Policy and the rapidly increasing European environmental policy influence social perception and discussion about rural areas, rural society and rural problems. The forms of this influence and its impacts are not well known, although there is a growing body of research literature on the consequences of European

¹ Paper presented of the XVII Congress of the European Society for Rural Sociology Prague, July 31–August 4, 1995

² with the collaboration of Christof Riegert, Aida Valadas da Lima, Eleuterio Sampaio

³ The deficits of this new system became visible with ongoing integration. As a political structure it is bureaucratized, highly dependent on changing political majorities, bureaucratic elites and interest coalitions in the member countries, and lacks political legitimation. There is no European public; there are no European parties; parliamentary decision-making up to today has mainly functioned at national and regional levels. As a political structure, the EU is neither state nor simply international regime. As a societal structure it differs from national societies and the global system. Although we have been accustomed to speaking of a "world society" since a long time, there are still significant difficulties in speaking of a "European society". Up to now, many important institutional structures have been organized in national economies and national political and social frameworks. These include, for instance, juridical structures for making policy determinations over such things as land tenure, property rights, land use, urban-rural balance, integration of agriculture into national economies with their systems of accounting, import-export balances, production-consumption relations, indebtedness etc. Although these structures, too, are becoming "Europeanized", this process is much slower, more complicated and contradictory than rapid political integration indicates.

political integration and European environmental policy.⁴ Instead of asking, how a genuine European order and discourse evolves above the national societies of its member countries, our question is the other way round: How does the emerging European order, whatever its quality, influence and change the ongoing national discourse over rural society, agriculture and environment? We compare national traditions of discourse on the rural environment in three socially, economically and geographically heterogeneous countries, France, Germany and Portugal, and how this discourse has changed under European influence. Thus the dynamics of European integration as an interaction between European and national spatial levels can be reconstructed.

The question as to why a problem of the rural environment exists, why environmental problems of non-industrial origin arose in the countryside, seems to find a simple answer when the impacts of modernization and intensification of agriculture, at least in the Northern member countries of the EU, are discussed. The question as to how the relationship between countryside and environment is perceived socially cannot be answered by simply referring to the modernization process nor by following an explanation logic of the kind "first technical and economic modernization, then environmental pollution, then social and political perception of the problems, then environmental action". In the EU member countries differing socio-cultural time frames, "logic of development", and codification of these issues exist. Several national examples must be discussed in comparative form in order to reveal such differences. We start with a sketch of traditional social notions of rurality in the three countries. Then we summarize the agri-environmental discourse since the beginning of environmental policy in western European countries in the early 1970s and, finally, we discuss the role of the agri-environmental programmes of the EU and its general significance for the national discourse on rurality, agriculture and environment.⁵

TRADITIONAL SOCIAL CONSTRUCTIONS OF RURALITY

In France, Germany and Portugal we find a notion of rurality which is essentially based on the dichotomy

of urban and village life, with the peasants being the traditional social subject for the development of rural societies and agriculture the dominant economic activity. However, the history, development and the cultural codifications of this dichotomy are rather different.⁶

(1) In France, with a strong agricultural tradition, the notion of countryside or rural life is based on the radical opposition of town and village which is in operation since the end of 19th century. The peasants were the dominant social group in the evolution of the countryside, not only for demographic reasons but also for political and ideological ones. The special social significance of the countryside is based on contradicting social images of rural life:

- The social dominance of agriculture and peasantry is fixed in one image, although peasants and agriculture have become majorized by other professions (workers) and other economic activities in the countryside.
- The radical transformation of agriculture, its integration into national economy, and the social orientation to modernity is not reflected in the social perception of the countryside; until today rural life is often synonymous with stability. "Ordre éternel des champs" was a well-known title of a book published after the Second World War.
- Simultaneously with this ideological social codifications of the peasantry unfolds a notion of rurality without reference to the social roles of peasants: This is the converging point of positive alternatives to urbanism (village community, direct production in relation with nature, local markets), of not-alienated life or life in contact with nature as said in the notion of the countryside as "green lungs" of the urban society.

Since the Third Republic, in periods of deepening social crises in France, there have been several counter-movements and ideological counter-attacks on industrialization in the sense of "back to the earth", celebrating rural life. The neo-rural movement of the 1970s is the newest one, creating a new rural utopia, born out of the crisis of urbanism and industrialism. It is this movement which combines the issues of rurality and environment (cf. Mathieu, Jollivet 1989; Viard 1990, p. 119ff).

⁴ Cf. Liefferink, Lowe, Mol 1993. The Maastricht Treaty and the completion of the Single European Market became the culminating points for several contradictory tendencies in development: increased environmental activity of the EU simultaneously with threats to weaken already achieved environmental protection; centralization simultaneously with an effort to strengthen decentral decision making in the EU via the subsidiarity principle.

⁵ The agri-environmental policy of the EC gained momentum since 1985. Within the ten years passed its paradigm have become intensification programmes: at first the so-called "efficiency regulation", later on the accompanying measures of the 1992 CAP-reform, formulated in EU regulation 2078/92. These measures have two objectives: market relief and environmental protection, thus becoming ambiguous.

⁶ The general concepts of city and countryside are multidimensional, therefore conceptual levels have to be specified. For the discussion here, the dichotomy is limited to socio-historical, sphere of everybody life, not taking reference to social macro-structures. The social differentiation of city and rural life happened long ago, during the Middle Ages. It remained a dominant structural differentiation for centuries, but after industrialization the division of classes under capitalism has become the dominant structural phenomenon, superimposed on the separation of urban and rural life. With the ecological discourse, this separation is discussed anew.

(2) In Germany, with a late process of industrialization, the most general social construction of rurality is based on the separation of rural and urban life. The separation of villages and cities happened in the Middle Ages already, but the social constructions and ideologies derived from this dichotomy which influenced modernization emerged in the 18th century only.⁷ The intellectually reflected images of the rural life and the countryside transmitted to us in cultural artifacts are based on the perception of non-rurals, urban and intellectuals at the eve of industrialization. The literate constructions of rurality, not the anonymous oral traditions, form the roots of a social concept of rurality which during the 19th and 20th centuries has gone through a variety of ideological overestimates. The social organization which unfolded within traditional agriculture and in 19th century as part of a traditional social construction of rural life is that of the peasant family farm from which an influential social ideology resulted. Latifundial farms and manor estates as form of older social organization of agriculture have existed in East Germany mainly (ostelbische Junker), but these have not become nuclei of dominant social ideologies like family farms.

The agrarian romanticism rooted in the ideological confrontation of a "natural and sound rural life" (as opposite connotations of urban life) was reflected sociologically at the end of 19th century: the urban/rural dichotomy reappeared in the concepts of "Gemeinschaft" and "Gesellschaft" by Toennies (cf. Pongratz 1988, p. 63f). Both concepts remained prominent in theoretical sociology for decades, until the theoretical works of Parsons, although its explanatory quality never became very elaborate.

In the traditional concept of rural life, the notion of environment is represented by that of nature. Before the analytical notion of environment became important in science and politics in the 20th century, nature was synonymous with this term in the meaning "our non-human surroundings" (Simmons 1993, p. 11). Additionally, the notion of landscape has become a semantic representative of the term of environment.⁸ In the socially produced form of landscape which is called "agrarian landscape" (Agrarlandschaft) we can observe

the evolution of societal interaction with nature as based on agriculture. The traditional structures of agrarian landscapes have succeeded to survive partly until today (cf. Born 1989). It is the rapid modernization process of agriculture combined with farm land consolidation (in East and West Germany under differing societal systems) through which these landscape structures vanish gradually since the 1960s.⁹

(3) In Portugal with its long period of colonialism, isolation from Europe and political dictatorship in 20th century, the change of traditional rural society and the dominance of agriculture, which began its transformation during the 1950s, accelerates in the 1970s and 1980s with the democratic revolution and with membership in the EC.¹⁰ The importance and weight of the rural society for Portuguese society in general has been largely responsible for the dominance of a strong rural reference within social and public discourse. Generations of scholars, from technical, literary and social perspectives, have approached the study of rural society in an effort to examine not only the "idyllic rural life" but also specific problems of agricultural production. The emphasis on rural life first found expression in technical rural monographs which analyzed local and regional physical and social conditions. Ethnologists, geographers and anthropologists tended to approach the subject of rural society as a closed, self-sufficient entity, as a community, where detailed empirical accounts provided rich descriptions of human geography, demography or family situations. Preserving the oral tradition meant providing interpretations of popular wisdom and knowledge, including its myths, legends and customs. The studious and scholarly approach was combined with practical considerations of agronomists, landscape architects and others to intervene technically in rural society. This tendency is still present practice for the use of experts and specialists within the countryside. Only since the 1970s a sociology and a rural sociology developed in Portugal, and with it the study of rural society expanded (cf. Mansinho, Schmidt 1994). It was no longer seen only from its internal specificity, including life styles and practices, but the rural became situated within the larger historical and political context of the rapidly modernizing

7 In the late 18th century, before the French revolution, in Germany a sentimental cultural movement among the aristocratic and bourgeois social strata was observed, which culminated in celebrations of the beauty and simplicity of rural life – inspired by the writing of Rousseau. In the early 19th century we find a similar esteem of rurality among leading intellectuals, in the philosophical and belletristic literature of German classicism and romanticism (authors like Goethe, Schiller, Novalis et al).

8 Also in France simple equation like "environment = nature = landscape" as popular images of urban origin are discussed (cf. Mathieu, Jollivet 1989, p. 11f).

9 Traditional denotations of rurality are rooted in the pre-industrial and pre-modern forms of society. The relative late and rapid modernization of agriculture in Germany after the Second World War and East Germany has not yet superseded these social constructions of agriculture and countryside, although the socialist development has nearly completely dissolved former social structures of agriculture and rural life. The social constructions change slower than the social structures on which they are based; moreover, in these social constructions (which are reinforced in the ecological discourse), the pre-modern practice of agriculture survives as a norm of good agricultural practice, and the local level gains new importance for the balanced interaction of nature and society through agriculture. For a re-framing of agri-environmental problems in the framework of cultural ecology, oriented to the analysis of local accommodation of agriculture to the ecological environment – cf. Bruckmeyer 1992).

10 Still in 1950 the active rural population was 50% of the total population, and only from the 1960s on wards a steadily increasing migration from the countryside to urban areas happened, providing cheap labour for industrial development.

Portugal. The 'externality' of rural society presented a new vision, and with it new roles and functions for rural society came into discussion¹¹.

In both the earlier rural monographs (cf. Almeida 1977) and in the more recent rural sociological studies, the rural society has been constructed through a combined analysis of social structures and relations with physical and natural environment. Physical space is therefore not a passive dimension of social relations but part of its very form, and thereby resists, adapts and conditions social relations. The rural environment constitutes the object of multiple human activities and utilizations, and this has been reflected in the prominence of multiple approaches to the rural environment.

In all three national traditions of rural life and its social constructions we find elements of dualistic concepts of society. The dichotomies of village and city, traditional and modern economic sectors, local and national or global cultures appear (cf. Pongratz 1988, p. 61f). However, these are only constituents of social constructions. These elements are used and combined in different forms in the processes of development. The social discourses on rurality and environment are fragmented and splitted, adopted by different social and political actors (peasants, governments, political groups, various intellectual movements, different scientific disciplines) and levels (local and national, with the local community being the original form of organization and self-perception of peasant cultures), anchored in heterogeneous cultural and national identities to be explained by history¹².

The literate discourses can be divided into cultural-normative and scientific ones. Each nation has a "leading ideology" of rural life and agriculture. In France, this seemed to result from the economic significance and the social esteem of agriculture and peasantry. In Germany, the cultural-normative ideology represented by "agrarian romantics" had some influence. In Portugal, the cultural-normative discourse on agricultural society has not found comparable expression in either economic terms or in the social esteem attributed to the peasantry. A less idealized and more practice bound social construction evolved here, resulting from the tradition of "action research", with ethnographers and other scientific and technical experts intervening in rural life – similar to explorers in the colonies, or, later on, European technical experts in development policy.

Although the notion of environment is absent in all traditional concepts of rurality, the environmental connotations of traditional social constructions of rurality can be identified. These connotations are based on the dominant role of agriculture in rural areas. They split in parts of nature, which are shaped under the influence of agriculture and other parts which represent the non-appropriated and non-used parts of nature (nature pro-

tection, national parks etc.). The relationship between agriculture and environment is reflected in notions like high quality of agricultural products and food, agrarian landscapes and habitats, rural communities as a form of integration of nature and society, maintaining the landscape and habitats. Beyond agricultural production, the environmental dimensions of rurality are expressed in normative concepts related to recreation, e.g. the beautiful landscape or "free nature" which have become a romantic or utopian orientation for urbans and intellectuals, or, today, for tourists.

DEVELOPMENT OF AGRI-ENVIRONMENTAL DISCOURSES

The political shocks of 1968 in West Europe mark the end of the post-war social development, not only the beginning of new social conflicts but also the beginning of a new environmental discourse as a critical reaction to modernization. In France and Germany, this new political and social discourse on the environment began in the years after 1968 with governmental programmes. Portugal, in these years still under dictatorship, was outside the mainstream political development in West Europe, and, like Spain, isolated from European development.

(1) In France, the programmes of the Government of Chaban-Delmas since 1970 and the foundation of a ministry of environment in 1971 (although the ministry was not very powerful and not well integrated into French state administration) indicate the beginning of a new political development. However, the state budget for environmental policy remained low compared with other industrialized countries. In 1974 a first ecological candidate, René Dumont, appeared on the scene, and in 1977 green candidates have been admitted for the municipal elections. The agricultural sector is excluded from the new environmental discourse in the French society which focussed on industrial problems. Also the political programmes and decisions directly addressing the countryside for reasons of nature protection do not touch agriculture or agricultural land use; they refer to non-agricultural areas only (forests, national and regional parks, natural reserves). Even the oil crisis in the mid-1970s led to a short-term political appraisal of agriculture as producer of "green oil". Until the end of the 1980s, a critical discussion of the relationships between modern agriculture and environment was a political taboo in France – environmental problems being exclusively seen as urban and industrial ones by the majority of the society. When the EU started with agri-environmental measures in 1985, the hesitation of the French government to implement such policy can be explained

– with the importance of the agricultural sector in French national economy (the biggest agricultural

¹¹ Cf. Lima 1987; Vester 1987.

¹² We do not discuss here, how the "introverted", land-based history of Germany, contrary to that of the "extroverted" identity of colonial Portugal influenced the relationships between rural and urban societies and the roles of both for national development.

producer in the EU, the second biggest exporter in global economy);

- with the importance of the agricultural profession as the leading one in the management of rural landscapes (well organized, with strong influence on the government; cf. Moulin 1988, p. 227f);
- with the importance of the peasantry as an ideological component in national identity.

Even with the activation of the agri-environmental discourse since the late 1980s, the problems of agricultural pollution have not been addressed directly but mainly via abstract scientific concepts and debates on

- risk (from risks bound to diminishing pasturage like risks of forest burn to risks caused by intensification like dangers for human health through agrochemicals);
- biodiversity (enforced by the discussion and demarcation of environmentally sensitive areas);
- landscape management (from the viewpoint of scenic landscapes for tourism to the production-oriented land use planning bound to agriculture). From this topic, a specific French construction is derived – that the peasant must stay the privileged manager of the landscape. This is a contested issue between peasants and other social groups, and environmental concern delegitimizes the traditional image of the peasant as a producer of food for the whole society.

(2) In Germany, the social-liberal coalition government of Brandt (in power since 1969) opened the new phase of environmental policy. The first governmental environmental programme was issued in 1971. The environmental policy unfolded in a series of phases (cf. Bechmann 1988) parallel to the unfolding of the environmental discourse in German society. This close interaction of governmental policy and social discourse leaves the impression of a rapid institutionalization of ecological protest. The opening phase was formulated by the federal government, whereas in the subsequent phase from 1975 to 1982, critical environmental movements and the Green Party evolved. The political scenery became highly conflictual in these years, as can be seen in the anti-nuclear protests¹³. Between 1983 and 1990, environmental protest and movements are institutionalized (e.g., first federal state governments in which the Green Party took part) and ecological orientations became widespread throughout the society. Only during this third phase of the environmental discourse, the sub-discourse on the rural environment

gained momentum – again with a critical discussion on agriculture and its environmental impacts¹⁴. This is expressed by the development of an agrarian opposition movement in the 1980s (which unified parts of environmental and third world movements with small groups of farmers critically aware of the environmental damages of modern agriculture) and, based on a multi-disciplinary scientific analysis, in the first extensive expertise on the environmental impacts of agriculture (SRU 1985). The end of the division of East and West Germany and the breakdown of socialism in 1990 defined the environmental situation completely new. From now onwards, East German agriculture, rapidly transforming into a large-scale industrialized agriculture under market conditions, represents the new factor in rural development, devaluating the West German development paradigm based on small and middle scale family farming.

(3) In Portugal, the agri-environmental discourse is attached to the natural and cultural heritage found in traditional rural Portugal. The European environmental policy, shaping a first critical notion of the relation between agriculture and environment, has a catalytic effect also for the formulation of a notion of positive relationships with reference to traditional agricultural structures and values. The discourse reveals the systematic weaknesses of an effective environmental movement or of a national 'green' consciousness. Ecological and environmental problems are identified as resulting from urban and industrial pollution and industrial waste and from international levels of pollution.

Portuguese "awakening" to environmental concerns dates from the time after the revolution of 1974, and it has been stimulated from Portugal's presence in international forums. This entering into international policy resulted in the introduction of national legislative measures and created a new political framework for environmental issues. The new constitution and the enactment of a series of legislative measures regulating the disposal of waste and the first attempt to create animal and wildlife protection areas attest to this. In the 1980s the government created the institutional conditions to guarantee the implementation of the legislation which, together with the European integration, laid the basis for further political action. Finally in 1990, the Ministry of Environment and Natural Resources was created. In spite of these recent trends, modernization combined with rapid rates of growth has had a negative

¹³ Since many big nuclear and infrastructural projects have been built in rural areas, the critical environmental movements are often rooted in local initiatives in rural areas. "An outstanding example is the regional network formed to oppose the south-west German nuclear power plant in Wyhl – only a few miles from the border with France; this network grew out of previous joint opposition to an industrial plant in Markolsheim (France). The Badish-Elssäsische Bürgerinitiativen, as it was called, was composed of French and German local citizen groups and was relatively coherent. While it was never strictly formalized, it served over many years as the backbone of the regional anti-nuclear movement and eventually attained its goals" (Rucht in Lieferrink, Lowe, Mol 1993, p. 80).

¹⁴ Although, since the mid 1970s, a new interest in the critical social sciences for rural areas – focussing on the crisis of rural lifeworlds – can be observed (cf. Schmals and Voigt 1986, p. 8), parallel to first critical discussions of the agricultural modernization course.

effect on the environment and, significantly, generally failed to involve or mobilize the population to its defense.

With the exception of Portugal, France and Germany seem to represent – nevertheless differing – examples of the mainstream of agricultural development under EC-influence since the 1970s. The beginning of the new environmental discourses is more or less simultaneous, at national, European and global levels, as the 1972 “wake up conference” of UNCED in Stockholm symbolizes. The specific role of agriculture determines the discourses on rural environment too. Until today, the countryside is seen as a “product” of agriculture mainly, although agriculture is marginal in terms of gross national product. Landscape is the framework for integration of land use and environmental quality, with traditional agricultural landscape structures now becoming elements of protection and conservation policies. In Portugal the discourse unfolds later but goes on more rapidly. Certain discourse elements which have been found in the other countries emerge here too – e.g., the role attributed to the farmers as main managers of the rural landscapes.

A positive relationship between agriculture and environment which is revitalized in the agri-environmental discourses dates back to pre-modern agriculture – it is the production technology of conventional agriculture (based on a circular economy). Conventional or traditional agriculture becomes a counter-paradigm to industrial agriculture and a paradigm for ecological modernization. Its basic elements reemerge in extensive agriculture, organic farming, or (continuation of) traditional relicts of agriculture – elements which represent the agri-environmental policy of the EU.

THE ROLE OF AGRI-ENVIRONMENTAL MEASURES OF THE EU

EC environmental policy began in the 1970s with a series of directives and regulations to attain a common level of environmental quality in the member countries. Although agriculture has been touched by certain environmental programmes and measures of the EC – e.g. by the directives on drinking water quality – there was no politically conscious and socially perceived EC agri-environmental policy in the member countries. Until the late 1980s, the CAP was dominated by environmental non-intervention. Only with the manifest crisis of overproduction and the introduction of quota regimes in the mid-1980s, a turning point was reached. Agri-environmental policy became a rapidly significant instrument for the reduction of agricultural surpluses.

(1) In France, the introduction of agri-environmental measures to be known as “article 19” in 1991 marked

a rupture in agricultural policy which since the 1960s had taken into account the effects of modernization and intensification of agricultural land use, but only to compensate structural disadvantages, not for reasons of environmental protection. Also the local regulation of water quality, which began at these times, did not touch agriculture and agricultural policy. Article 19 became the symbol for a new agricultural policy (cf. Alphandéry 1994; Billaud 1994; Deverre 1994) – with the regulation 2078/92 as a continuation of this policy. Four experimental sites which have been demarcated in 1989 still were of exceptional character – meanwhile many zones exist, the multiplication being mainly a consequence of the “plans of sustainable development” (PDD) in operation since 1991¹⁵; these have been designed by an inter-ministerial committee to integrate production systems and environmental production and to enlarge the social basis for agri-environmental policy in France. Within three years the original budget has increased six times and the number of local projects flourished – the obvious success means that the original objective of the measure to protect the environment is slowly transformed into a measure of support for marginalized agricultural regions. The National Farmers’ Association (FNSEA) also accepted the measures, thus contributing to the emergence of a dual image of agriculture which abandons the traditional French agricultural model with the argument “while efficient and productive (though less polluting) businesses continue to be socially valued, so is a new form of agriculture that maintains the landscape and produces ‘new’ subsidized services and quality regional food products.” (Alphandéry 1994, p. 333).

(2) In Germany, the agri-environmental measures of the EU starting in 1985 do not mark the beginning of environmental intervention in agriculture and landscape. Whereas nature protection and landscape management have been practised since decades without any debates on agricultural land use and without legal codification of “good agricultural practice” in ecological terms¹⁶, agri-environmental programmes have been designed in some federal states since the early 1980s. Such measures (for the reduction of fertilizers and agrochemicals, for protection of biotopes, certain species and natural resources, mainly groundwater) can be seen as cornerstones of an extensification policy and soon they reemerged within EU-programmes. Without saying that the measures formulated in the 1985 efficiency regulation of the EC and later on in regulation 2078/92 are of German authorship, it can be said that they fitted well in the situation and the agricultural policy of the German federal states (although, at first,

¹⁵ Cf. Alphandéry 1994, p. 333f for a description on the PDD.

¹⁶ Until today the Federal Nature Protection Act from 1976 has not been amended. The agricultural clause of this law says that orderly agriculture is contributing to nature – this privilege clause for agriculture is the object of environmental criticism since long.

there was not sufficient support among the farming community). A phenomenon to be observed in several federal states of Germany is, that some of the agri-environmental measures now defined as components of regional programmes to implement regulation 2078/92 have passed a career – e.g. they have been part of regional (federal state) programmes in the 1980s, became parts of the first EU regulation then and finally part of the new regulation EC 2078/92 – and, it can be supposed, they are waiting for a new EU-programme to be continued after 1997.

With regard to the social acceptance and impact of the agri-environmental measures, it can be observed, that the longer the measures are in existence and the more they become generalized or offered to all farmers (not only in sensitive areas), the more they are accepted by the farming community and their political representatives. Furthermore: the longer they are in existence, the more actors are trying to make sense of them – also the environmental community tries to find its positive contributions of the measures to nature protection, and the hitherto dominant critical argument, refusing the measures as inconsequential and insufficient, begins to be used less fundamental and more differentiated. The fronts have been simple at first – most environmental movements refused the measures because of their insufficient contribution to environmental protection and most farmers refused it because of state intervention in their production systems. Now the differentiation lines begin to fade away¹⁷.

(3) In Portugal the agri-environmental measures as the first big environmental programme including agriculture have to be related to recent changes in agriculture to be interpreted adequately.

Traditional agriculture in Portugal has been extensive, with low levels of nutrient input and high levels of semi-natural vegetation. Although it may cause environmental problems e.g. by overgrazing or overuse of water, with its extensive character it was environmentally sound. Since Portuguese agriculture is still predominantly not intensified, there is not much sense to introduce extensification measures targeted to de-intensify production forms which are still not typical for the country, practiced in minor areas and by a minority of farmers only¹⁸. The implementation of agri-environmental measures becomes more meaningful when they can be used to reach other goals at national and regional levels than at EU level. These goals can be understood when some of the dramatic changes within

rural Portugal have been analyzed – changes during the period in which Portugal came under EU rule. From 1981–1991 the agricultural population has fallen from 25,7% to 16,7%. And, as a consequence of outmigration from rural areas, more and more rural residents are elderly people. In 1989, one third of the Portuguese agricultural population was over 55 years old. In the interior rural areas, demographic recession combined with a low standard of living and accentuated ageing of the population have already contributed to the physical and human abandonment of the countryside. The level of population density in the interior rural areas has fallen dramatically, social and physical desertification becoming possible¹⁹.

The main environmental problems in rural areas are that caused by giving up land use and by the rural exodus – but these do not fit into the goal structure of regulation 2078/92 which is following the combination of market relief through extensification. To close the gap between real local problems and problems as they are defined by the EU, the measures have to be re-defined, not just accommodated to local conditions what the regulation demands.

- They do not just support extensification, but mainly serve to support the continuation of traditional locally adapted forms of agriculture.
- They become components of social programmes, contributing to a reduction of the migration trend because the preservation of rural landscape and environment is possible only if the rural exodus is stopped.

The application of agri-environmental measures in Portugal therefore is an effort to combine preservation of the natural environment with redressing some of the particularly problematic social and demographic developments in rural areas. The measures in the Portuguese application of regulation 2078/92 intend to ameliorate social conditions while maintaining and preserving extensification and traditional systems of agriculture (cf. Instituto de Estruturas Agrárias e Desenvolvimento Rural 1994).

If we break down the explanation and action logic of regulation 2078/92, we may find an ideal-typical argument of the following kind in it: to reduce overproduction in agriculture and to contribute to more environmentally sound forms of natural resource use, all types of measures to reduce intensity of production at farm level – from reduction of inputs like fertilizers and agrochemicals (as weak forms) to conversion to organic farming (as a strong form) – will be supported

¹⁷ Cf. Heinze, Voelzkw 1993 for an analysis of the changing positions of the German Farmers' Association (DBV) which follows a strategy of economizing ecological issues, with "demands for compensatory payments for environmental contributions" of farmers (ibid., p. 36).

¹⁸ Portugal does not produce an agricultural surplus, its production is insufficient to meet current demands – in the last two decades the situation has aggravated, with less than one third of food demand met by internal production.

¹⁹ Other changes in the uses of the rural environment have accompanied the decline of agriculture and of an active agricultural population: increase of leisure activities such as golf course, rural tourism, natural reserves and wildlife parks, conversion of farms into weekend houses for wealthy urbanites. However, such changes are slow and their impact has been mostly felt by wealthy tourists and city dwellers, not by rural residents.

by CAP. This argument reveals the preponderance of "northern problems" and the dominance of rich, northern countries in the EU. Furthermore, it is not a social construction in the sense of socially anchored forms and traditions of agriculture, but a specific scientific-bureaucratic construction based on farm management. It is thought of as a correction of the former course of CAP, not as a reaction to real developments in the agriculture of the member countries. However, with their influence on national discourse, the agri-environmental measures of the EU seem to be the first step in a process of building an European policy on rural environment outside the traditional scope of expert circles, bureaucratic policy and agricultural lobbies – a policy which evokes debates on its social legitimization in the member countries.

THE ROLE OF THE EU FOR THE NATIONAL DISCUSSIONS ON AGRICULTURE, ENVIRONMENT, RURALITY

The influence of the EU in the member countries is not perceived mainly as a new supra-national or "originally European" approach to environmental issues, but through a re-definition of the social role and legitimacy of agriculture in the various member countries.

(1) In France, EC environmental policy and agri-environmental measures seem to have had an accelerating effect on the unfolding of agri-environmental discourses in the wider society, although the breaking of the taboo happened very late (cf. Deverre 1994, p. 220). Inside the French society the rules of the game have changed for the agricultural community, but agriculture has not yet found a new and stable identity (cf. Billaud 1994, p. 227ff).

(2) In Germany, the new critical discourse on environmental problems of modern agriculture and destruction of agrarian landscapes was not perceived as of EC origin but as issues at national, regional and local levels which unfolded politically in the controversies between environmental and agricultural lobby, with the agricultural lobby being and staying the dominant one. The formulation of the image of the farmer as a landscape manager and the seek of new roles for agriculture is ongoing, but so far these are reactions only to the environmental problems as they aggravate, not an autochthonous role-taking²⁰.

(3) In Portugal, the agri-environmental measures of regulation 2078/92 as first contact with EU agri-environmental policy (former regulations have not been applied) are not perceived primarily as environmental

measures but as such of the CAP reform in general. This reform is aiming at reducing overproduction and market relief – again problems to which Portugal has not contributed. Thus national agricultural policy and the agricultural community are torn between the aspirations to make use of a policy tailored for the northern countries mainly and the concern for further modernization of Portuguese agriculture which is not able to cover the national demand for agricultural products.

The EU through its agricultural and environmental policies had relative differing impacts on the rural development in the three countries studied here. It did not simply homogenize development processes by subsuming it under one coherent, Europe-wide policy and market system, but the EU development schemes for agriculture cause disturbance and turbulence in the social conflicts and discourses on agricultural development and environment. Nowhere EU impacts are simply seen as gains or losses, positive or negative, but they are perceived as parts of conflicting and contradictory developments. "Europeanization" of policies does not create a new society *sui generis* beyond the local, regional and national levels, nor the EU remains an abstract and artificial political-institutional system. It is existing through its interaction with national and local societies²¹. The policies formulated and implemented by the EU, especially agricultural and environmental policies, follow the course of OECD policy recommendations in many respects (cf. OECD 1989, 1993). The integration of both policy fields is progressing. However, this does not mean, that the EU with its policy has reached already substantial changes in the agricultural practices in the member states.

– First, a long refusal within European societies in general and within the agricultural profession in various EU countries can be observed to accept the idea of agriculture as polluting activity: with time lags and as reactions to growing environmental awareness, changing consumer styles, critical environmental movements or (with a confusion of the function and causalities) as reaction to EU policies implemented, this becoming aware and self-critical about the ecological consequences of agricultural modernization happened in all countries. The rational core of the refusal of the agricultural profession is the fact, that the individual farmer is not the one who causes environmental pollution by his free decisions, but he became himself a dependent producer, dependent from CAP and the political enforced development which, until recently, did not give much leeway for alternatives to intensification and growth orientation.

²⁰ EC environmental policy and agri-environmental measures before 1990 did not cause any critical disturbance of national and regional environmental policies. German environmental policy came into crisis after the German unification and with the further development of EU environmental policy. Now the national approaches and experiences in environmental policy become devaluated and come under legitimization pressure as policies of inefficient, regulatory style.

²¹ This only a temporary impression in times (as presently) when the emerging political and societal orders between the global and the local levels still cannot be conceptualized adequately.

- With regard to environmental policy in general, the question has been discussed, if the "Europeanization" of environmental policy has shifted the social perception and construction of the environment as "being defined in normative, scientific rather than cultural terms" (cf. Buller, Lowe, Flynn in Liefverink, Lowe, Mol 1993, p. 192). If we go down to the level of the agri-environmental discourses in the member countries, it might be difficult to verify such a trend empirically, although it exists and is a general one. However, it may find a partial explanation with the argument that there is no socio-cultural tradition or "cultural reservoir" of the EU, but only that of the member countries, hence the main legitimation EU policy can find (beyond the scope of power) and defend is a scientific one.

CONCLUSIONS

Contrary to the direction of conventional policy research – if there is an emerging European style of policy and environmental discourse – the question discussed here is, which feedback effects the European integration has on the national environmental discourses.

Codifying terms of the relationship between rurality and environment, e.g. the social dimensions of rural/urban, traditional/modern, local/global represent different, partly contradictory, partly antagonistic, partly complementary or overlapping constructions of spatial order, landscape and nature.

Different time horizons, directions and specifics of agricultural modernization in the three countries are part of the explanation for various social constructions in the rural environment. Beyond differences, the similarities tell us as much about the unfolding of a European discourse: Up to now, all constructions have been codified nationally, clearly demarked by national cultural traditions and national languages. This demonstrates the difficulties of social acceptance and legitimation of a new level of European political and social order. Existing mechanisms of social integration and legitimation do not fulfill this function.

(1) In France, the EU caused partly unexpected changes of the traditional strong and positively valued role of agriculture, which has to find new forms of legitimation. However, the relationship of agricultural practices and environmental quality is not a single and coherent social construction. It is effective at different political and societal levels. The agri-environmental measures are not the only and exclusive reference point for a new discourse, but they are part of a contradictory process of development. It is in a "bottom up" process,

starting at local levels, that these measures become part of the construction of a new agricultural legitimacy; that is, they do not become effective in a direct confrontation with discourses, social constructions, identities and ideologies at national level. At local levels they are not simply new social norms that are redirecting behaviour of farmers, but they become part of a process of changing the rules of the game, i.e. of redefining the role and legitimacy of agriculture in an open process. The experimental quality, the flexibility and local adaptability of the measures underline this process and negotiation type of effect. The measures can be influenced, changed, reviewed in the further policy process, thus time becoming the decisive factor.

(2) In Germany, rural and agricultural development took an unexpected course in the 1990s only, with the end of the East-West division and after German unification²². Although not a consequence of EU-policies, EU becomes now for the first time a critical opponent to German environmental policy, and German approaches to environmental policy lose significance. This shifting of the weights has uncalculable influences on the agri-environmental discourses in future. A first effect of this might be seen in the event that the traditional confrontations and interest conflicts between the agricultural and environmental community begin to melt away and require a redefinition of the objectives and roles of agriculture for the environment in the years ahead.

As a consequence of the relative autonomy of the federal states, these are free to formulate their agri-environmental programmes and prioritize or neglect certain types of measures if they do not fit into regional practice of agriculture. Although most measures can be found in most state programmes, the state policies are not made coherent by the federal government – thus, certain measures are practiced in certain regions only and the payments for the participation of farmers in management agreements vary from state to state. The discriminating impacts of the measures for certain types of holdings and certain regions will be the long-standing critical issue in the implementation of agri-environmental policy. What this again means for the further development of agriculture, with possible consequences of regional segregation of areas with intensive and extensive agriculture etc., cannot be evaluated at the moment²³.

(3) In Portugal, there was little environmental and agri-environmental policy before its late membership in the EC. This membership per se brought a rapid and accelerated process of exogenous modernization, part of which is "ecological modernization". In this conflicting process historically different forms and systems

²² The division of the country with two very different societal systems resulted in a new situation: after the end of the political division we find an ongoing division of agricultural structures, which has unexpected impacts on West German agriculture, the dominant in Germany up to now. The confrontation of a rather small scale with a large scale agriculture will shift the development paradigm from preponderance of family farming to industrialized.

²³ Just the fact should be mentioned, that presently in most federal states the programmes do not require from the participating farmers to bring their total areas in a management agreement – hence they may continue with intensive practices in part of their areas.

of agriculture interact with strange effects – the EU agri-environmental policy introduces measures into Portuguese agriculture which are targeted for other forms of agriculture. What is extensification in an agriculture which is still dominantly extensive and traditional?

In Portugal, the social discourses on rural environment remain divided into a national and an “imported” EU discourse which does not link very well with the problems felt by people and the concerns for improving the quality of life in rural areas. Health and sanitation concerns, such as running water and regular garbage pick up, are still primarily identified with creating basic modern and developed conditions. In general, the social discourse continues to identify modernization of agriculture as a goal, and preservation of the countryside and the rural environment as a traditional heritage which harmoniously combines nature and social space.

For the present phase, we may say that one effect of EU policy is that of splitting social discourse and segregating environment-related practices. However, do the agri-environmental measures contribute to a new social legitimization of agriculture in the wider society?

For France and Germany, with certain differences, it might be said that a process of social redefinition of agriculture is under way and that the agri-environmental measures of the EU support this tendency. In Portugal, it seems that the rapid structural change of agriculture dominates the discourse; less so the case is a perceived social redefinition of agriculture. The problems in rural development in Portugal differ from that of the other two countries. EU policy does not create new social legitimization – that is, legitimacy born out of intra-societal or national and regional ideologies. We can see some general similarities in policy development, for instance, in the change from the legitimacy attached to securing the supply of food to the new legitimacy attached to maintaining landscapes and protecting nature (cf. D e v e r r e 1994, p. 233f). We cannot yet see greater influence of the non-agricultural aspects of the rural environment – although there are traditions of nature protection, the social construction of a rural environment is still dominated by the agricultural issues.

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Contact address:

Karl Bruckmeier, KATALYSE Institute für angewandte Umweltforschung, Weinsbergstr. 190, 50 825 Köln, Germany, tel: ++49 0221 546 10 55, fax: ++49 302 652 866

AGRICULTURE AND ENVIRONMENT: A NEW DEBATE WITHIN FARMERS' UNIONS¹

ZEMĚDĚLSTVÍ A ŽIVOTNÍ PROSTŘEDÍ: NOVÁ DISKUSE V RÁMCI FARMÁŘSKÝCH SDRUŽENÍ

F. Garrido Fernandez, E. Moyano Estrada

Institute of Advanced Social Studies, Cordoba, Spain

ABSTRACT: As is known, agriculture has increasingly become a less important sector in rural area. This lack of importance is reflected both by economic terms and the number of people working in this sector. At the same time, the productive model in agriculture is questioned and agriculture is now considered as a polluting agent. On the other hand, new activities or functions to develop in the rural environment have arisen. That is due to several reasons as a new urban population living in rural areas, a delocalization process in agriculture, an increasing concern in environment, etc. Until now, farmers' unions were the most important organizations present in the rural area because a greater part of rural population was employed mainly in agriculture. Nevertheless, those new activities or demands make that representative organizations of rural population must include them among their interests. Farmers' unions could choose for incorporating these issues within their organizational discourse, for keeping out from them or for looking for new representation patterns where other organizations could collaborate (ecologist, consumer, etc.). This situation has served for introducing the sustainability debate within farmers' unions. This paper will try to analyze the Spanish situation and some initiatives taken by Spanish farmers' unions as to this issue.

environment, agriculture, rural organizations, Spain

ABSTRAKT: Je známo, že zemědělství se stává odvětvím se stále menším významem v rurálních oblastech. Tento klesající význam se odráží jak v ekonomických ukazatelích, tak také v počtech pracovníků v tomto sektoru zaměstnaných. Současně je také vedena diskuse o produkčním modelu zemědělství, které je v současné době považováno za jednoho z činitelů znečištění životního prostředí. Na druhé straně se však také objevují nové aktivity a funkce, které se rozvíjejí v rurálním prostředí. To má několik příčin, například nová městská populace žijící v rurálních oblastech, proces delokalizace zemědělství, rostoucí zájem o otázky životního prostředí a další. Až dosud byly nejvýznamnějšími organizacemi, existujícími v rurálním prostředí, sdružení a odborové svazy farmářů, poněvadž podstatná část rurální populace byla zaměstnána v zemědělství. Zmíněné nové aktivity a z nich vyplývající požadavky však nutně vyžadují, aby je organizace reprezentující rurální populaci začlenily mezi své prioritní zájmy. Sdružení farmářů se tedy mohou rozhodnout tato témata buď mezi své zájmové priority zařadit, či je vyloučit, anebo hledat nové vzory činnosti, v nichž by spolupracovaly s dalšími organizacemi (ekologickými, spotřebitelskými atd.). Tato situace přispěla k tomu, že se v rámci farmářských sdružení nastartovala diskuse o trvale udržitelném rozvoji. Tato práce se snaží o analýzu situace ve Španělsku a hodnotí některé iniciativy španělských sdružení farmářů v tomto směru.

životní prostředí, zemědělství, rurální organizace, Španělsko

This paper analyses the introduction of agri-environmental debate in Spanish society and how this subject is being incorporated within the agenda of Spanish government. To understand the cultural and political context the agri-environmental debate is raising, we pose firstly our reflections about the increasing concern on environmental problems and about the emergence of the sustainability notion. Secondly, we analyze some features of the Spanish countryside and the process of agricultural modernization in order to understand the diversity of agricultural and social structure in Spain.

Finally, we point out the most important aspects of the agri-socio-structural policy in Spain and the current status of agricultural organized interest and environmental groups.

THE CULTURAL AND POLITICAL CONTEXT

As is known, agriculture has increasingly become a less important sector in rural area. This lack of importance is reflected both by economic terms and by the number of people working in this sector. At the same

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time, the productive model in agriculture is questioned and agriculture is more and more considered as a polluting agent. Besides this, new activities or functions to develop in the rural environment have arisen. That is due to several reasons like a new urban population living in rural areas, a delocalization process in agriculture, an increasing concern on environment, etc.

During last years, the awareness of environmental problems is more and more present in developed industrial societies. The concern in the increasing spoiling of environment and on the necessity of implementing protection and conservation programmes of natural resources is becoming an important subject in both public opinion and political sphere.

As is usually accepted, this awareness is being encouraged by several factors. Firstly, by the expanded acknowledgement that the current economic development models are responsible for the negative effects on environment. At the beginning, this awareness arose from minorities groups of population (mainly from the ecologist movement in the early 1970s) with not too much influence in the decision-making process. Later on, it spread toward the rest of public opinion until it reached the political sphere. Secondly, by the verification in developed countries that the maintaining in force of intensive patterns of agriculture is a non-rational attitude after having achieved the food self-sufficiency, since they produce enormous agricultural surpluses and are responsible for the damage to forest and for the aquatic pollution, too.

Initially, in the early 1970s, environmental problems were confined to the effects produced by industrial activity. These effects were identified with the activity realized by the major polluting industries, so application of *Polluter Pays Principle (PPP)* was demanded for them.

Until recently, agriculture was respected as to its responsibility as a polluting agent because of the following reasons:

1. *Agricultural activity has been developing basically on atomized family farms.* It has made difficult, for example, the implementation of the *PPP* since it would have had to be implemented on sources of diffuse pollution where, opposite to industry, it is not possible to identify who is really the polluting agent.
2. For a long time, agricultural activity has been attached to the nature while farmers have been considered, from a symbolical point of view, as an *example of harmony and respect to the environment.* This idealized image has remained anchored in the consciousness of urban people – most of them coming from rural areas – in spite of the fact that environmentally harmful intensive practices of agriculture are being introduced in a long way by farmers.
3. *Agriculture is a strategic industry for national economies and it is also the base of food supply.* That is why governments of all western countries have been interested in regulating the farming sector im-

plementing protectionist policies in order to encourage the increase of agricultural productivity. This increase has been necessary to maintain, with a more and more reduced farming population, a high level of agricultural production capable of guaranteeing the food security. Furthermore, these protectionist policies have been used by certain countries to secure the exporting potential of its agricultural sector in the international trade.

4. *The rural elites and farmers' unions have had a very important influence on decision-making process,* mainly during the stage of productive modernization. In the European Union (EU) countries, farmers' unions, co-operatives federations, agricultural chambers and also the ministries of agriculture have created, altogether a sort of "agricultural front" (a particular agricultural policy community) capable of keeping agriculture and farmers *out of* the prevailing social and economic rationality.

This exception enjoyed for a long time by agriculture and farmers has started to change quickly in the last years. Public authorities and political forces have inserted in their agendas the necessity of reforming the current mechanisms of agricultural protection. Furthermore, they have firmly posed the convenience, on the one hand, of modifying the regulation patterns of agriculture, so far oriented towards the target of productivity, and, on the other hand, of favouring the introduction of less intensive and more environmentally sound agricultural practices.

On the EU-level, several factors have influenced this change of attitude of public authorities towards agriculture. Some of them have been related to the rising in public opinion of new non-agricultural interest groups, which demand a different regulation of agriculture taking not only productive but also environmental criteria into account. Other factors came from the construction process of European Union. In fact, all governments of EU countries have posed the control of CAP-financing budget as a priority in order to brake the growing of agriculture surpluses and to release economic funds to develop other activities. All that as a condition to advance the process of unity and cooperation among European countries.

However, these international factors would not have been able to encourage the CAP-reform by themselves and to introduce a new discourse about agriculture and rural areas. Other factors (external factors) have accelerated the mentioned change of thinking on agricultural problems and environmentally harmful effects.

Among these external factors we can emphasize the following. On the one hand, the recently finished GATT negotiations about the liberalization of the international trade of agricultural products. As you know, a considerable reduction of CAP-price-protection system was demanded in EU in those debates which obliged the EU authorities to implement a new system of protection to compensate their farmers. On the other hand, the challenge represents the consolidation of

democratic system and market economy in Eastern European countries. This challenge poses to the EU the convenience of opening its agricultural market in order to favour the interchange with those less developed European economies. Finally, it must be added too that the necessity of building on the world-level a new network of relations between developed and developing countries is based on a new exchange and cooperation model.

In all these cases, agriculture plays a decisive role in the implementation of the above mentioned new exchange system because farming activity is the most important productive activity and the base of export market in developing countries. That is why the reform of current guarantee price policies prevailing mainly in EU countries and having been implemented thirty years ago to encourage the increase of agricultural productivity and to favour the use of intensive practices by farmers, is considered as a previous condition to build a new exchange system.

In that context, the emergence of the *sustainability* notion can be placed. This notion has been incorporated to the debate on agricultural development from out agriculture. In fact, the notion of *sustainable development* is one that had its origin during the 70s in the general discussion about the negative effects caused on environment by the productive development model in industrialized countries (the two reports to the Club of Rome elaborated in 1972 and 1974 by the MIT encouraged the concern of western people in ecological problems). The agricultural activity was excluded from the debate because of reasons mentioned before, and its special statute of ecologically non-harmful activity was respected.

When this statute is questioned and the appraisal of negative effects of intensive agricultural methods begins, the damage to the environment is incorporated into the debate on agricultural development. The notion of sustainability is taken then as a point of reference to put in order the discussions within the scientific community, firstly, and within the political sphere later. Such notion has had the virtue of putting the idea of the balance between environment, agricultural production and farmers income into the debate. But, the fact is that, once achieved that purpose, it has shown itself as a vague and ambiguous notion with some difficulties to be understood by agricultural community.

The fact that the notion of sustainability has been originated in the framework of the general debate about development models places it in a strange position for farmers and their farmers' unions. They fear that the notion of sustainability is going to reduce their freedom to choose the more profitable agricultural practices. This explains the defensive and hostile attitude held by *agricultural community* (farmers' unions, rural based political groups, and agricultural public authorities).

In our opinion, the relation between agriculture and environment is an *economic* and *sociocultural* one. It is an economic relation because farmers use natural

resources to make agricultural products – mainly food – but it also is a sociocultural relation because they use nature as habitant and symbolical place. In fact, it is a historically and geographically determined relationship. That is why we think the notion of sustainability in agriculture must be defined in accordance with the particular relation held by farmers with their natural surrounding in each economic and cultural context.

Nevertheless, it does not mean to accept that each farmer has his own notion of sustainability, since in that case it would not be longer an operative and useful notion for analysing this subject. However, it is necessary to take into account that the relationship between agriculture and environment varies in the different kinds of farms according to their sizes and productive orientations. For instance, it is not the same relationship between environment and agriculture in irrigable intensive farming as in that existing in dry extensive agriculture or in greenhouses. Neither it is the same the relationship existing between environment and small family farmer (who considers the rural areas not only as a place to get the more economic profitable production from, but also as a living and working area) as that of existing between environment and big farmer (who considers the natural surrounding as a production factor mainly).

We propose in this chapter an approach to the notion of sustainability from the particular situation of Spanish agriculture, posing some ideas in order to understand better the attitude of the agricultural community.

SOME FEATURES OF THE SPANISH AGRICULTURAL COUNTRYSIDE

Spain has a large agricultural sector, although it is not as intensive as that other European countries as Denmark or Netherlands. This is indicated for example, by figures showing the amount of nitrate fertilizers used in 1988/89, which was only 43.1 kg/ha, whereas in Denmark it was 134.2 kg/ha and in Netherlands 215.4 (Commission of the European Communities 1993).

The scale of Spanish territory (around 50 millions hedges) and the low population density (70 habitants per km²) has not created any serious competitive problems by sharing land between farmers and non-farmers, except in several areas near tourist resort, the Costa Brava and Costa del Sol. However, the low population density is unequally distributed over the national territory. There is a reduced number of big metropolitan centres where nearly 50% of population is concentrated (like Madrid, Barcelona, Valencia or Sevilla) and also there are some vast regions affected by depopulation problems (like Castilla or Aragon).

Together with the demographic heterogeneity, it must be noted that the large variation in the natural and physical environment makes Spanish territory one of the main countries in the EU with very diverse animal and plant species. This variation is due to the condi-

tions of the physical environment which produces different ecological niches. In effect, from the large littoral coasts, the ground gradually rises – like the South Mediterranean littoral – or becomes high in a rugged way – like Cantabrian region – forming mountainous chains with heights ranging from 1,000 to 2,000 metres. These mountain ranges have created a vast central meseta, the Castilian meseta, that has continental weather and poor soil for agriculture. Some important rivers such as the Guadalquivir and Ebro cross these mountain folds rising valleys that constitute the most fertile agricultural areas in Spain. However, the soil's fertility within the valleys of several regions is limited by the low annual pluviometry.

Besides the orographic factors, historical factors have stressed the structural differences in Spain territory. These factors include resettlement and colonization process which coincided with the reconquest of the land occupied by Muslims². This process established the current structural difference in Spanish agriculture and rural society: small holdings in areas north of the River Tagus, larger landowners in the South, together with a large agricultural working population.

This agricultural and social structure has been maintained without any great changes for centuries. Some attempts to modify the situation, essentially during the 19th century land alienation reforms and the agrarian reform of the 2nd Republic (1932), only served to reinforce the accumulation in structural problems that not only became more and more difficult to solve, but also have hindered any attempt to implement new reforms. The structural reform-projects undertaken during the Franco regime (1940–1975) were mainly aimed at small farming Spanish regions. The land consolidation programmes were successful, although, they had little success in modifying the social structure.

THE MODERNIZATION OF SPANISH AGRICULTURE

The modernization process of Spanish agriculture began in the early 1960s. However, that process was not realized within a structural reform plan like in France, where there were some specific legislation on agricultural structures³. The process was encouraged by factors outside of agriculture and was connected with the more general industrialization process⁴.

The new expanding industrial and service sectors provoked a large rural exodus from the south Spanish regions (mainly from Adalusia and Extremadura) to the

north Spanish ones (mainly to Catalonia and Basque Country) and to other European countries (mainly to Germany, France and Netherlands). The exodus was mainly comprised of agricultural workers and small holding farmers. More than one million people left the agricultural sector. The agricultural workforce fell from 47.6% in 1950 to 29.1% in 1970. Spanish agricultural production directed its market to satisfy the demands of the growing urban population. Furthermore, the agricultural sector was integrated into agro-industrial system boosting the productive activities in the machinery sector as well as the industrial sector of fertilizers, pesticides and seeds.

However, this modernization process was not planned by State institutions having only partial effects on the agricultural sectors as a whole. In fact, it only affected the productive side and not the structural side of Spanish agriculture, not being placed into a framework of any specific guidance policy. Therefore its effects on Spanish agriculture varied. So there were some farming regions where farmers quickly incorporated the intensive agricultural methods in their farms, like the regions of the Mediterranean coast, The Duero and Ebro river basins, or greenhouse areas in the Andalusian littoral. On the contrary, there were farming regions where more extensive agricultural methods followed, namely, the cereal producing areas of Castilian meseta and Guagalquivir valley, or the cattle-raising zones in Extremadura, or Andalusian olive regions.

This can explain why the modernization process did not help to modify the traditional agricultural structure, whose special characteristics have already been mentioned before. In fact, that process produced the coexistence of a large sector of small farms relying on a strongly protectionist price system introduced by Franco's government, and a reduced sector of big and extensive farms that was hardly integrated into the agri-food markets. Together with them, there was a very localized (in the Mediterranean littoral) and specialized horticultural production sector with well market-oriented family farms which has become a very important sector in term of production.

THE VARIETY OF AGRICULTURAL PRODUCTION SYSTEMS

This approach to the modernization of Spanish agriculture and to its agro-ecological diversity leads us to emphasize the existence of a great variety of agricultural production systems. These systems are charac-

² The Muslims presence began in 711, when the Arabian army came in through Tarifa, and finished in 1492, when Catholic King and Queen reconquered Granada. However, since 1100, a gradual process of reconquest and resettlement of the occupied land happened, leading to a different ways of settlement depending on different historical circumstances.

³ In France, in 1960 and 1962 the Parliament passed two important laws on agricultural structures – the *d'orientation agricole* (1960) and the *loi complementaire* (1962).

⁴ In 1959, the called Stabilization Plan was passed. This plan is considered by specialist as the end of economic autarchy, opening the Spanish economy to international markets. In this way, the political isolation which it had been suffered by Franco regimen was broken.

terized, among other things, by having developed a specific relationship with the environment and natural surroundings. It explains the one sided views of Spanish farmers concerning environmental problems, that differ from one production system to another. These differences are reflected on a political level, since the Spanish state is federally organized in autonomous regional governments that have significant influence on agricultural and environmental matters.

This diversity is showed by the fact that in some Spanish regions, intensive farm systems producing negative effects on environment already exist. These effects are similar to those produced in other European regions (as in Belgium, in Netherlands or in Denmark), although they have not yet reached such serious levels. For instance, the excess use of fertilizers in some fruit growing areas, as in Valencia or Catalonia, is starting to pollute the groundwater. The massive use of plastics in greenhouse areas, as in Granada or Almeria in southern Spain, is creating an important problem of how to dispose of the waste.

Nevertheless, in extensive cereal systems, the relationship between agriculture and environment shows the negative side in a different way, such as soil damage and exhaustion caused by deforestation and the use of intensive cultivation practices. These problems exist in Castilian meseta and in some areas of the Gaudalquivir valley.

In irrigation farming, environmental problems are produced through the wasteful use of water by farmers who have had little training on hydraulics and the obsolescence of pipe nets.

Finally, in intensive livestock systems, although the atmospheric pollution by gas emitted from animal waste has not yet reached emergency levels, it is already possible to see some of these factors in certain regions of Catalonia. In any case, the main problem of these intensive livestock systems lies in the fact that they are usually based on industrial farms and located near urban centres, subsequently provoking water and atmospheric pollution.

On the contrary, there are agriculture some extensive production systems in Spanish in which there does exist a harmonious relationship between agriculture and environment which should be preserved and supported. Here it is possible to mention the *dehesa* system in Extremadura, where the integration between extensive livestock and the environment has been successful, or the olive system in Mediterranean regions.

With the brief examples showing the diversity of Spanish agricultural systems, it is clear that the agriculture and environment in a country such as Spain, which is so heterogeneous from ecological and structural point of view, is difficult to analyze. This situation is different from those of European countries where the land is more uniform from orographic point of view, where the climates vary only a little from one place to another and where the agricultural structures are based on homogeneous family farming. In these countries,

environmental problems are easily identified with the massive use of intensive practices aimed at increasing considerably the productivity of the farms.

In Spain, in contrast, there is in every production system a special relationship between agriculture and environment and the problems affecting natural surroundings are not always linked to the intensification of agriculture. Sometimes the problems are caused by the fact that the farms have not been modernized (for example, they waste water in irrigation) or due to the abandonment of agricultural activities in certain areas (increasing risk of forest fires, for example).

AGRICULTURAL INTEREST ORGANIZATIONS AND ENVIRONMENTAL GROUPS

In order to understand the Spanish case, it is necessary to mention other factors additional to those mentioned above on the diversity of its orography and heterogeneity in the agricultural structure. These factors include the importance and the level of articulation of environmental issues in public opinion and politics. In contrast to other EU countries, it can be said that environmental concern has only recently been incorporated into Spanish public debates and that it is not articulated enough to be nowadays considered as a political and social priority in Spain.

However, the emerging Spanish environmentalist movement is helping to a wider knowledge of environmental problems by population. Over the last ten years there has been an important increase in the number of ecologist associations that can be explained by factors related to both the advance of a new postmaterialist culture among Spanish young people and the consolidation of the democratic context in Spain (Tábara 1995). However, the Spanish environmentalist movement is still very little articulated at the national level being formed by small and disperse association which use to combine the defence of the environment with other claiming issues, such as pacifism or leaving NATO. The environmentalist movement does not constitute an organized lobby in Spain yet and it is rather a social and cultural network. One of the most outstanding attempts of coordination among Spanish environmentalist organizations is the CODA (Coordinadora de Organizaciones de Defensa Ambiental), an umbrella structure that integrates more than 150 associations.

Together with the little importance of environmental issues for Spain public opinion – worried mainly by economic problems like the unemployment level and the maintaining of welfare state services – the weakness of the environmentalist movement may explain to a great extent the delay in passing environmental measures by national institutions. In fact, Spanish government is not pressed enough from civil society to implement a environmental policy that is not yet a political priority nowadays in Spain.

The low articulation level of the Spanish environmentalist groups even hinders the efforts of regional

and national administration to implement a system of neocorporatist concentration on environmental policy. So, the creation of regional and national institutions to make the participation of environmental organized interest easy has found a lot of difficulties because of the dispersion of the environmentalist groups and the lack of a social movement articulated enough to represent them within such institutions. It is usual that in the Spanish regions where there is a best articulated environmentalist movement more environmental measures are implemented.

In terms of politics, there is not a Spanish political party for which environmental issues would be a main claim. The two most important parties in the Spanish parliament – the labor PSOE (Partido Socialista Obrero Espanol) and the conservative PP (Partido Popular), are gradually introducing environmental issues into their electoral programmes, but they are doing it in a rather ambiguous way without questioning clearly the economic growth and industrial development. In this sense, more progress in terms of environmental issues has been made by the left electoral coalition called Izquierda Unida (Unit Left), which won 10% of votes and 15 seats in the last legislative elections in June 1993. This coalition is led by the old communist party, PCE (Partido Comunista Espanol), and it integrates other political and social groups, such as PSOE's dissident groups and groups linked to some sectors of the ecologist movement.

In particular, the ecologist movement has made several unsuccessful attempts to be represented in Spanish parliament through a political party following the German model of the "Greens". The "green" vote in Spain has not been very stable and always smaller than that got by Green parties in other European countries. It can be said that the electoral support to Spanish Green parties has varied a lot following the kind of elections (European, national, regional or local elections) (Tábara 1995). For example, in the last Spanish legislative elections (1993), two ecologist parties put forward their candidatures but they failed to win any seats and only got 2% of votes at national level. Rather than the changing strategies or the coalition that ecologist could make, it is the lack of a rank and file wide enough to support environmental ideas what probably limits the ecologist option in Spain. On the other hand, the difficulty of defending a purely ecologist position and the conjunctural and opportunist origin of some of these groups are all factors which have not helped to increase people's trust in these parties (Tábara 1995).

In terms of the relationship between agriculture and environment and the introduction of sustainable methods, the public debate on the possible polluting effects of agriculture as a diffuse source of pollution did not exist before Spain entered the EU. Nevertheless, after 1986, the debate, for example, on the D(EEC) 676/91 on water pollution by nitrates in agriculture has been rather unusual within public opinion

and, in particular, within the agricultural sector. In Spain agriculture the pollution levels in groundwater are still low, and the problem of emission and storage of manure hardly – except in specific areas of Catalonia – due to the low importance given to livestock in the national agricultural production.

This explains why the public debate on environment and agriculture in Spain is more centered on aspects related to the specific context existing in each Spanish region. For instance, there is an unanimous consensus among the Southern regions about the importance of considering the use of water in a agriculture as the main environmental problem. In fact, currently there is a real dispute between farmers and non-farmers about the use of water and the urban population demands that farmers use water more rationally on their farms, given the situation of drought. This situation has led to some villages having water's restrictions for more than ten hours in a day and an alarming decline in the quality of water used for human consumption. Another important issues which are being incorporated into the environmental political agenda is that of forest fires and the role that farmers can play in their control and prevention. Likewise, the problem of plastic waste in greenhouse areas also poses doubts of the convenience of developing super-intensive agricultural methods in a limited number of regions with land expansion problems.

In short, the awareness of environmental problems and possibility of creating an environmental national policy are gradually increasing based on the uniqueness of the Spanish situation. It makes the environmental concerns in Spain different to a certain extent from those of the rest of EU-countries.

In order to understand the real nature of the development of Spanish agri-environmental policy and the role of agricultural interest groups, it is necessary to take into account that in Spain there does not exist a close relationship between farmers' unions, agricultural co-operatives federations and Ministry of Agriculture to defend the general interest of agriculture and collaborate in the implementation of agricultural policy. These relations cannot be analyzed as if they were an agricultural policy community.

In fact, the situation of Spanish farmers' unions is very unstable and precarious. There are three national farmers' unions – ASAJA (Asociación Agraria – Jóvenes Agricultores), COAG (Coordinadora de Organizaciones de Agricultores y Granaderos) and UPA (Unión de Pequeños Agricultores) – with important differences from a social point of view which have hindered until now the consensus on agricultural policy. Because of the recent Spanish political history they have not the opportunity to participate in regular neocorporatist relationship with the Ministry of Agriculture. The affiliation level of farmers' unions in Spain is very small in comparison to others European countries – no more than 15% of Spanish farmers are affiliated to any of the three farmers' unions mentioned

before. They are still undergoing internal reorganization and divisions between different organizations occur continually.

Therefore Spanish farmers' unions are a weak policy community – nearer a network rather than a policy community – and have little influence in the implementation of socio-structural policy. However, this new policy is seen by them as an opportunity to recover a place in rural society which has not been achieved in the market policy. This explains the initiatives taken by some Spanish farmers' unions, like COAG and UPA mainly, who represent small farmers, to coordinate their activities with environmentalist groups and adopt the sustainability issues in their debates. Examples of these initiatives are the Plataforma Rural (Rural Platform) adopted by COAG and some ecologist associations, or the collaboration agreement between UPA and SEO (Sociedad Española de Ornitología – Spanish Association of Ornithology) for the development of joint actions capable of harmonizing agricultural development and environmental protection.

CONCLUSIONS

In agri-environmental field, the Spanish government's actions have followed the steps marked by European Union. In general, Spanish farmers have not been very interested in agri-environmental policy. The insufficient information, the very little participation of farmers' unions in their implementation and the small amount of money devoted to those aids, can be some of reasons for this lack of interest. However, the new environmental concern introduced within the Common Agricultural Policy and more specifically the accompanying measures passed in the CAP-reform of 1992, have served to dynamize the debate within agricultural sector and specially within farmers' unions. This debate embraces the relationship between agriculture and environment and it has taken the notion of sustainability as a reference framework to put order in it. In the Spanish case, it turns particularly complex due to the great heterogeneity of agricultural production systems and therefore of different relationship between environment and agriculture.

In order to make the implementation of agri-environmental policy feasible, all measures aimed at promoting the introduction of sustainable farming methods should not be considered as external actions to the agricultural community. On the contrary, the public authorities have to persuade this agricultural community (farmers and farmers' unions mainly) to identify itself with those programmes and contribute to their elaboration and implementation. In this sense, Spain has a comparative advantage in relation to other countries dominated by a powerful "agricultural policy community". The weakness of the agricultural lobby may be an advantage to introduce new sustainable agricul-

tural methods and to implement the agri-environmental policy.

For Spanish farmers' unions this policy is seen as a very good opportunity to improve their image and social presence in rural society and to play a significant role as intermediate agents in the new relationship between State and farmers.

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Contact address:

Fernando Garrido Fernandez, Eduardo Moyano Estrada, Consejo Superior de Investigaciones Cientificas, Instituto de Estudios Sociales Avanzados – Andalucía, Edificio Universitario de Servicios Múltiples, Avda Menéndez Pidal, s/n, 14004-Córdoba, Spain, tel: (957) 21 81 39, fax: (957) 21 81 40

TOURISM STRATEGIES AND RURAL DEVELOPMENT^{1,2}

STRATEGIE AGROTURISTIKY A RURÁLNÍ ROZVOJ

B. Slee, H. Farr, P. Snowdon

Department of Agriculture, University of Aberdeen

ABSTRACT: This paper presents findings from the UK component of a three-country, European Commission-funded study of rural tourism³, a primary focus of which is the examination of the economic impacts of different styles (soft and hard) of tourism development on rural economies. Two rural areas of the UK were investigated in depth: Exmoor in south west England; and Badenoch and Strathspey in the Highlands and Islands of Scotland. Detailed information was obtained on tourist spending patterns and attitudes and on tourist and tourist-related businesses and their employment-generating effects and inter-industry linkages. The findings of such studies can inform the wide-ranging debate about the use of tourism development in rural restructuring and the creation of a more sustainable rural economy.

rural tourism, development, U. K.

ABSTRAKT: Tato práce předkládá výsledky britské části trojstranné studie o agroturistice, financované Evropskou komisí, jejímž hlavním cílem je zkoumání ekonomických dopadů jednotlivých typů rozvoje turistiky (tzv. tvrdé a měkké) na rurální ekonomiku. Hluběji byly zkoumány dvě rurální oblasti velké Británie, Exmoor v jihozápadní Anglii a Badenoch a Strathspey v Highlandech a na Skotských ostrovech. Byly získány detailní informace o úrovni výdajů turistů a jejich přístupech a o podnikání v turistice a souvisejících oborech podnikání, o jejím vlivu na vytváření pracovních příležitostí a o vnitrodvětvových vztazích. Výsledky této studie mohou podnítit rozsáhlé diskuze o významu rozvoje agroturistiky pro restrukturalizaci rurálních oblastí a vytváření udržitelného venkovského hospodářství.

agroturistika, rozvoj, Velká Británie

INTRODUCTION

Over the last decade there have been major pressures on the European rural economy, arising in the EU countries from changes in the Common Agricultural Policy (CAP) and in the central and eastern European (CEE) countries from the major political and economic transformations since the late 1980s. In both cases, the centrality of agriculture in the rural economy has been questioned, and alternative economic activity in rural regions has been promoted by policy measures. Rural tourism is one of the economic activities that has received a great deal of interest and attention (OECD 1994).

Economic arguments are crucial factors behind the promotion of tourism as an alternative or expanded economic activity in rural areas. In recent decades in Europe and elsewhere, the expansion of tourism has contrasted markedly with the contraction of primary and manufacturing industries. Not all regions have benefited from this expansion, for example regions characterised by traditional urban-based resorts in the

UK. However, in general, rural areas have benefited from changes in tourism demand and rural areas which have previously had very limited levels of tourist activity have developed new tourist industries. However, in spite of the widespread promulgation of tourist activity as an adjustment/development strategy for rural regions, there has been remarkably little detailed investigation of the economic implications of tourism. For example, little is known about the overall effects of agro-tourism on rural employment, or whether a tourism strategy based on small-scale farm operators is better for local economic development than one based on purpose-built resorts.

Tourism development has been examined by a wide range of social and environmental scientists, who have explored the implications of tourism developments on the social, economic and biophysical environments. Considerable stress is often given to the negative effects of tourism, including cultural dilution, social disruption, the part-time nature of much tourist-related work, enclave-style developments with high rates of leakage of economic benefits, pollution and environ-

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mental degradation. The existence of negative dimensions of tourism is not contested in this paper. However, it is argued that the central rationale behind the promotion of tourism as an adjustment strategy is economic, in spite of which there is still widespread ignorance about the economic implications of tourism development. The elucidation of the economic facts relating to tourism is thus a task requiring urgent attention.

The debate about appropriate styles of tourist development in rural areas must also be considered in the wider context of the restructuring of the countryside and the growth of consumption demands on rural space (Marsden et al. 1993). At the same time as there have been strong tendencies towards the globalization of markets derived from economic activities in the countryside (Bonanno and Bradley 1994), there is also evidence of the vitality of endogenous modes of production (van der Ploeg and Long 1994). Rural tourism markets are characterised by the same differences between exogenously owned developments and endogenous responses to tourist provision.

THE POLICY CONTEXT

At a European level, policy development in rural tourism can be attributed to two main sets of factors. First, there have been major changes in agricultural policy, arising from CAP reform, General Agreement on Tariffs and Trade (GATT) pressures and CEE political changes. Second, there have been changes in tourism policy at a national level, arising in part from concern about tourism and the environment and in part from changes in tourism demand which have created problems (often of decline) in some traditional holiday destinations.

Agricultural policy

The GATT agreement of 1992 was important for rural areas, in that agriculture was included in the agreement for the first time. The result has been the legitimization of 'green box' support measures, which are not production-related subsidies, and limits to subsidized exports (dumping), which had become such a feature of European and other agricultural trade prior to the agreement. Small doubt that there will be further pressures for reductions in agricultural support in subsequent GATT rounds early in the next millennium.

The CAP reforms of 1992 were a response both to GATT pressures and problems internal to the European Community relating to the spiralling support costs and agri-environmental problems. The attempts to produce a 'modulated' policy supporting small farmers were successfully resisted by the UK representatives, who recognized that the UK would emerge as a net loser if modulation were to be introduced. The final agreed package of price reductions in cereals and beef, with

compulsory set aside and area (green box) payments represents a political compromise between the different interests within the EU. In addition, a more positive approach was taken to agri-environmental measures, with the clear expectation that they would receive a greater proportion of the total level of support. It is also significant that in Agricultural Commissioner MacSharry's term, the name of DGVI was changed to include Rural Development as well as Agriculture, reflecting a commitment to a broader EU perspective on the rural economy.

The reform of the EU Structural Funds has had a great impact on support for non-farm activity in the rural economy. The Single European Act merged three separate elements of EC funding into the Structural Fund, i.e. the Guidance element of the Agriculture Fund, the European Social Fund and the European Regional Development Fund, and generated a new set of policy instruments which were targeted on 'objective' regions, defined by the EU. The Objective 1 regions were especially disadvantaged areas where regional incomes averaged less than 75% of the EU average. Objective 5b areas were disadvantaged rural areas, which lacked the level of disadvantage of Objective 1 areas. Within these Objective 1 and 5b areas, spending from these three funds was concentrated. There were also major institutional innovations, particularly in the LEADER programme, a bottom-up, local-agency approach to rural economic and social development, which was taken up by 217 groups throughout Europe. The support for the Structural Fund was extended in the 1992 reforms with Objective 1, Objective 5b and LEADER programmes receiving increased support.

The CEE countries have experienced major changes in their agricultural sectors in recent years, with major privatization programmes taking place at a time of falling demand (and prices) for farm products. There are major differences in the farm structure in different CEE countries, which makes it impossible to generalize about the extent of their agricultural adjustment problems. However, there is a very heavy density of rural population and a recognition that agriculture is incapable of sustaining the levels of employment that it had in the recent past. Because of the large numbers of part-time farmers in some of these countries, there is a need to explore the opportunities for off-farm work, as the future well-being of rural people will depend increasingly on non-agricultural earnings. There is, consequently, a recognition of the need to adopt a more integrated perspective on CEE rural development in the future (Slee and Lloyd 1995).

The probable entry of the CEE countries into the EU early in the next millennium will have two principal effects on rural areas in Europe. First, it will provide a (possibly modified) framework of CAP and Structural Fund support for rural areas in the CEE countries. Second, the budgetary pressures created by this enlargement, probably taking place at a similar time to the next GATT round, will generate further pressures for CAP

reform. The net effect will be, of course, a tendency for agricultural support to decrease and for rural economies throughout Europe to become less dependent on agricultural activity for their well-being.

Tourism policy

There is now recognition at an EU level of the importance of tourism. At the Maastricht Conference in 1992, the EU agreed to develop measures to address the tourism sector. This resulted in a Green Paper in 1995. Tourism is seen as a 'strategic economic development priority' (EU 1995), a means of creating greater cohesion through the economic revitalization of disadvantaged areas, and a mechanism for the support for distinctive cultures. Also since 1992, the EU has engaged in a variety of measures including action projects, research and development and ensuring competitive practices in tourism. The breadth and heterogeneity of the tourism industry mean that the industry has long been affected indirectly by EU measures.

Taking the UK as an example of the policy context of tourism, it can be seen that, compared to agricultural support policies, the level of public institutional support for tourism is modest. In Scotland in the late 1980s, tourism support costs for a larger industry than the agricultural sector, were well under 5% of the support costs of Scottish agriculture. In the UK, the principal support structures and policies for tourism were a product of the Development of Tourism Act of 1969, which established administrative structures, classification schemes for accommodation and enabled the newly created tourist boards to engage in promotional activity and grant disbursement to the tourist sector.

During the 1980s, a number of significant changes took place in the government's attitudes and policies towards tourism. At a time of deregulation and the withdrawal of the state from activities that could be seen as market-led, tourism was ideologically 'clean', a symbol of the ability of entrepreneurship to regenerate economic vitality in what was perceived to be an over-regulated economy. Furthermore, tourism has always been seen as a useful industry in terms of job creation, with an ability to employ those displaced as a result of restructuring elsewhere in the economy.

In a UK context, tourism is now seen as a potential contributor to rural regeneration. Rural development agencies have recognized the potential of tourism and a number of inter-institutional initiatives have been developed to address the challenges created by tourism in rural areas such as the negative environmental consequences (Scottish Tourism Co-ordinating Group 1993a), and integrated local action through, for example, Tourism Development Action Programmes (P o m p l and L a v e r y 1993).

Rural tourism in the UK has taken a number of forms. The nature of tourism in rural areas varies from traditional self-catering and bed and breakfast enterprises to holiday villages and time-share developments.

Behind the actions of a wide range of tourist providers and tourists, a debate has taken place about the appropriate development strategy for rural tourism. The green/soft/alternative model of tourism development has been forcefully articulated by Lane (1988; 1992), building on ideas developed by Krippendorf (1987). Others have adopted a highly critical perspective on the utopianism of soft tourism models and strategies (Wheeller 1991).

Thus, at a European and national level, it is possible to trace a major change in the level of public and private interest in rural tourism. This interest has led to a debate about the appropriateness of different styles of tourism development. It is ironic that, given that the argument is about rural tourism as a development strategy, so little attention should have been given to the economic implications of the widely variant strategies for rural tourism development that are currently practised, from the development of capital intensive holiday villages to the co-ordination of small tourist providers in area-based projects. It is this issue which the remainder of this paper addresses.

Research Methods

In order to examine the overall impact of tourism on recipient regions it is necessary to go beyond the immediate impact of tourist spending on accommodation. Input-output analysis has been developed as a technique to explore the impacts of spending in one sector on the economy as a whole. Because of the complexity of defining tourism as an industry, the total impact of tourist spending can only be tracked effectively by detailed examinations of visitor spending and inter-industry transactions.

The nature of the tourism industry, which includes aspects of the transport, service and catering industries, makes it (almost) impossible to utilize data produced in national input-output tables. Conducting a full input-output analysis from raw data requires information pertaining to each sector of the economy. This normally makes the costs of such analysis prohibitive. Therefore, alternative methods have been devised to investigate the regional economic impacts of tourism. Most studies utilize the proportional multiplier methodology generally attributed to Archer (1973) and developed further by Henderson and Cousins (1975) and Vaughan (1988; 1994).

These studies enable the following economic impacts of tourism to be examined:

- Direct impact - the impact of tourist spending on incomes and jobs at the businesses where tourists spend their money.
- Indirect impact - the impact resulting from successive rounds of local business transactions that result from tourist spending.
- Induced impact - the impact on incomes and jobs of the spending of income earned as a result of spending by tourists.

The direct impact will be the most important impact and is likely to vary significantly from one style/type of tourism to another. The indirect impact will depend on the extent to which tourism businesses use other firms located within the local or regional economy as suppliers of goods and services. The induced effect will be dependent on the labour intensity of the businesses associated with the direct spending, and the ability of the local economy to satisfy the demands of the resident population for goods and services.

It is necessary to distinguish between hard and soft tourism. It is recognized that there is a continuum between, at one extreme, externally owned, enclave-based tourism developments which are largely disconnected from the regional economies in which they are located and, at the other extreme, small-scale enterprises, located on land management units, which are one area of economic activity of pluriactive households. For the purpose of this study all hotels with 10 bedrooms or more and all holiday villages are regarded as hard tourism, and all tourism taking place on rural land management units (farms and estates) are regarded as soft tourism. For the purposes of this study, the tourists staying in hard or soft tourist enterprises are described as hard or soft tourists, although it is recognized that this segmentation is one of convenience.

Data on inter-business transactions were collected both for the local area, defined by the district council boundary in the case of Badenoch and Strathspey and the national park boundary for Exmoor, for an extended area, which comprised all transactions within 25 km of the local area boundary, and the residual transactions with the wider economy. This enables the extent of leakage to be explored at a local and subregional level.

The data sets collected for Badenoch and Strathspey and Exmoor allow estimates of the total economic effects on the local and regional economies to be assessed. The remainder of this paper focuses on the direct effects only.

Case Studies

This section briefly describes the characteristics of the study areas and presents the results of the analysis of the direct effects of tourism spending.

Badenoch and Strathspey District, Highland Region, Scotland

The administrative district of Badenoch and Strathspey lies in Highland Region of Scotland towards the geographical and economic periphery of Britain and the European Union (EU). Highland Region was accorded Objective 1 status in 1994 under the EU Structural Fund reforms, having been designated as an Objective 5b region in the previous round of Structural Fund spending. Badenoch and Strathspey District covers an

area of 2 291 square kilometres in the upper valley of the River Spey between Perth and Inverness. The area's population of 11,008 is concentrated in several small towns. Population density is low, at approximately 5 inhabitants per km², compared to a national average of 60 per km² (Census of Population 1991).

The district is renowned for its high mountain landscape quality and has developed as a popular destination for summer and winter tourism which has become the mainstay of the local economy (Getz 1986). Tourism has evolved around a number of recreational activities, including skiing, fishing, hunting, watersports, climbing and walking. Approximately 70% of employment in the district derives from tourism and service industries. Rothiemurchus Estate, in the centre of the district, receives in excess of 300,000 visitors per year (Scottish Tourist Board 1993b) and the district as a whole is estimated to receive 323,000 holiday trips per year (Moray Badenoch and Strathspey Enterprise 1994). The scale of tourist spending on the local economy is considerable; for example, skiing in the Cairngorms contributed £10 million expenditure to the local economy of Aviemore in 1986 (MacKay Consultants 1986 cited from Highland Regional Council 1990).

8% of the workforce is employed in agriculture (1991 Census of Population), which is based on livestock systems dependent on mainly rough grazing with a little arable farming. Poor land quality ensures that extensive land management practices predominate. Farm structure is divided between landowners with large sporting estates, and small, often tenanted family farms and crofts.

The growth of tourism has been concentrated around Aviemore, where a large hotel and entertainment centre was constructed in the 1960s with considerable public financial support. Accommodation is mainly provided in large hotels (average size 54 beds), holiday villages and timeshare developments. These developments helped to reverse the effects of depopulation in the 1950s by encouraging in-migration, particularly into Aviemore, thereby establishing a more balanced population structure (Getz 1981). However, in recent years the Aviemore Centre has suffered from neglect and decay; a number of facilities have been closed and the Centre has failed to provide lasting economic and social benefits.

Exmoor, South West England

Exmoor is one of the smallest of the ten National Parks in England and Wales, covering only 265 km². The total population at 10,494 is similar to that in Badenoch and Strathspey, which covers nearly 9 times the area, giving a population density in Exmoor is 15.3 persons per square kilometre. Exmoor and the surrounding area is relatively economically under-developed compared with the rest of the UK and has recently been granted Objective 5b status under the most recent round of EU Structural Funds.

Exmoor was designated a National Park for its wide variety of important landscape types and habitats, including a coastal fringe and a high remote moorland core. Also of particular note are 3,000 ha of ancient woodlands. Most agriculture is concentrated in the valleys which surround the moorland. Farming is based mainly on extensive livestock production, reflecting the physical and environmental constraints of the area, with some arable production in the main valleys.

The high quality of the natural environment of Exmoor attracts over 1 million visitors per year. This is estimated to create employment for 3000 people and to inject approximately £9 million into the local economy (Somerset County Council 1989). Most of the accommodation supply is from numerous small establishments, including farm accommodation. Though

farm tourism is not a new phenomenon in Exmoor, agricultural adjustment has led to approximately one in four farms diversifying into other activities (McInerney and Turner 1993), of which tourism is the principal form of diversification.

Economic Impact of Tourism in Badenoch and Strathspey and Exmoor

It is intended here to show preliminary results on the nature of visitor and tourist business expenditure in the two study areas, and to contrast results within and between regions. Large scale face to face surveys of tourists and tourist businesses were carried out over a six month period in the summer of 1994.

I. Average daily expenditure per person of 'soft' and 'hard' accommodation visitors in Badenoch and Strathspey and Exmoor, June–September 1994

Accommodation type	Average daily expenditure per person (£)	
	Badenoch & Strathspey	Exmoor
Bed & breakfast	23.85 ¹	39.88
Self-catering		20.61
Camping/Caravan	14.34	10.56
All 'soft' accommodation	18.71	15.22
Hotels	40.92	41.57
Holiday villages ²	27.74	–
All 'hard' accommodation	35.63	39.78

¹Due to small sample sizes of questionnaires completed at farm bed and breakfast and self-catering units in Badenoch and Strathspey, the two sectors were merged in order to produce visitor spending results of greater statistical reliability.

²The Holiday Village sector is very small in Exmoor and separate figures are not given for reason of confidentiality.

Source: Authors' survey

II. Average daily expenditure per person of 'soft' and 'hard' accommodation visitors in different types of expenditure (£)

	Accomm. £	Food £	Shops £	Leisure £	Transport £
Accommodation in Badenoch & Strathspey					
Bed and Breakfast	13.68	3.75	3.69	1.67	1.71
Self-catering	12.81				
Camping/Caravan	3.20	2.82	4.35	2.28	1.68
'Soft' accommodation	7.72	3.25	4.05	2.00	1.70
Hotels	32.71	1.41	2.01	3.84	0.54
Holiday villages (rented & t'share)	12.02	4.48	7.65	2.04	1.57
'Hard' accommodation	24.57	2.48	4.10	3.16	0.93
Accommodation in Exmoor					
Bed and Breakfast	28.63	4.67	4.07	0.77	1.74
Self-catering	12.79	2.82	2.94	0.23	1.83
Camping/Caravan	3.49	2.61	2.84	0.55	1.07
'Soft' accommodation	7.60	2.87	2.99	0.54	1.23
Hotels	33.40	3.12	3.37	0.58	1.01
Holiday villages	–	–	–	–	–
'Hard' accommodation	31.68	3.17	3.37	0.57	0.99

Source: Authors' survey

Visitor Spending

Table I illustrates that visitors staying at accommodation in the hard sector spend much more per person per day than visitors staying at accommodation in the soft sector. These average figures are influenced by the low expenditure levels of large numbers of visitors staying at camping and caravan sites and the higher expenditure of visitors at hotels.

Table II demonstrates that the high and low levels of expenditure at hotels and camp-sites respectively are attributable principally to the accommodation tariffs. Amounts of visitor spending in other expenditure categories

are broadly similar in the hard and soft sectors for each area but there is some variation between the areas.

Table III shows that the overall quantity of tourist spending in Badenoch and Strathspey is approximately 6.5 times greater in the hard than the soft accommodation sector. However, in Exmoor the soft sector generates nearly 1.5 times as much total visitor spending as the hard sector.

Business Spending and Employment

Tables IV–VII contrast the expenditure patterns of businesses in the hard and soft accommodation sectors

III. Total bednights sold, average expenditure per person per day, and visitor spending between June and September 1994 in Badenoch and Strathspey

	Total bednights sold	Average expenditure per person per day (£)	Visitor Spending (£)
Badenoch & Strathspey			
<i>Hard accommodation</i>	406,601	35.63	14,487,194
<i>Soft accommodation</i>	115,333	18.71	2,157,880
Exmoor			
<i>Hard accommodation</i>	82,470	41.57	3,428,278
<i>Soft accommodation</i>	329,558	15.22	5,015,873

Source: Authors' survey

IV. Average turnover and expenditures in the 'soft' accommodation sector in Badenoch and Strathspey and Exmoor

	Badenoch & Strathspey		Exmoor	
	£ average	%	£ average	%
Turnover	18,318	100.0	34,613	100.0
Expenditures:				
Local expenditures	7,949	43.4	11,768	34.0
Extended area expenditures	2,832	15.5	9,074	26.2
Expenditures made elsewhere	3,896	21.3	8,134	23.5
Tax/rates	3,641	19.9	5,637	16.3

i) Percentages may not add up to 100 due to rounding

ii) Average turnover figures for hard and soft accommodation are unweighted

Source: Authors' survey

V. Average turnover and expenditures in the 'hard' accommodation sector in Badenoch and Strathspey and Exmoor.

	Badenoch & Strathspey		Exmoor	
	£ average	%	£ average	%
Turnover	890,637	100.0	194,480	100.0
Expenditures:				
Local expenditures	208,752	23.4	50,090	25.8
Extended area expenditures	93,027	10.4	37,505	19.3
Expenditures made elsewhere	341,294	38.3	56,006	28.8
Tax/rates	247,564	27.8	50,878	26.2

i) Percentages may not add up to 100 due to rounding

ii) Average turnover figures for hard and soft accommodation are unweighted

Source: Authors' survey

VI. Expenditures made by the 'soft' accommodation sector in the core (local) and extended (subregional) areas, Badenoch and Strathspey and Exmoor, 1994

	Local costs as % of turnover		Extended area costs as % of turnover	
	Badenoch & Strathspey	Exmoor	Badenoch & Strathspey	Exmoor
<i>Inputs</i>				
Farm	0.3	0.55	0.0	0.0
Food & drink wholesale	0.1	0.03	2.2	10.18
Other wholesale	1.7	0.18	0.9	3.38
Office supplies	0.6	0.14	0.3	1.59
Retail	1.7	0.56	0.3	2.46
Business support services	1.3	0.34	0.8	1.52
Repairs & maintenance	7.7	6.67	3.4	4.97
Other	2.6	2.99	7.6	1.14
<i>Total inputs</i>	16.0	11.46	15.5	25.25
<i>Rent</i>	6.2	2.51	0.0	0.0
<i>Wages</i>	11.9	5.82	0.0	0.68
<i>Drawings</i>	3.6	8.74	0.0	0.29
<i>Additions to capital</i>	5.7	5.34	0.0	0.0

Source: Authors' survey

VII. Expenditures made by the 'hard' accommodation sector in the core (local) and extended (subregional) areas, Badenoch and Strathspey and Exmoor, 1994

	Local costs as % of turnover		Extended area costs as % of turnover	
	Badenoch & Strathspey	Exmoor	Badenoch & Strathspey	Exmoor
<i>Inputs</i>				
Farm	0.1	0.02	0.0	0.16
Food & drink wholesale	0.8	1.78	3.7	14.53
Other wholesale	0.2	0.19	0.8	0.38
Office supplies	0.2	0.15	0.2	1.03
Retail	0.01	0.18	0.02	0.11
Business support services	0.1	0.08	0.1	0.48
Repairs & maintenance	1.3	1.52	0.2	0.92
Other	1.7	0.67	3.9	1.40
<i>Total inputs</i>	4.3	4.58	8.9	19.01
<i>Rent</i>	0.6	0.0	0.0	0.0
<i>Wages</i>	16.8	14.67	0.6	0.28
<i>Drawings</i>	0.5	2.97	0.0	0.0
<i>Additions to capital</i>	2.2	3.53	0.9	0.0

Source: Authors' survey

VIII. Total number of unstandardized and standardized jobs in 'hard' and 'soft' accommodation sectors in Badenoch and Strathspey and Exmoor

Accommodation type	Total number of unstandardised jobs in sector		Total number of unstandardised jobs in sector	
	Badenoch & Strathspey	Exmoor	Badenoch & Strathspey	Exmoor
Bed and breakfast	21	74	14	38
Self-catering	45	63	19	28
Camping/caravan	32	41	18	17
<i>Total 'soft' accommodation</i>	98	178	51	83
Hotels	748	260	589	145
Holiday villages	277	-	138	-
<i>Total 'hard' accommodation</i>	1 025	285	886	149

Source: Authors' survey

IX. Standardized jobs: number of jobs per establishment and per 1000 bednights in 'hard' and 'soft' accommodation in Badenoch and Strathspey and Exmoor

Accommodation type	Jobs per establishment		Jobs per 1000 bednights	
	Badenoch & Strathspey	Exmoor	Badenoch & Strathspey	Exmoor
Bed and breakfast	1.08	1.13	5.51	1.01
Self-catering	0.90	1.01	0.93	0.42
Camping/caravan	2.57	1.42	0.19	0.07
<i>Total 'soft' accommodation</i>	1.24	1.15	0.44	0.25
Hotels	24.54	5.06	2.71	1.90
Holiday villages	17.25	—	0.73	—
<i>Total 'hard' accommodation</i>	27.69	5.02	2.18	1.81

Source: Authors' survey

X. Number of jobs per £100 000 turnover in 'hard' and 'soft' accommodation in Badenoch and Strathspey and Exmoor

Accommodation type	Unstandardized jobs per £100,000 turnover		Standardized jobs per £100,000 turnover	
	Badenoch & Strathspey	Exmoor	Badenoch & Strathspey	Exmoor
Bed and breakfast	29.8	9.6	19.5	4.8
Self-catering	14.6	7.4	6.2	3.3
Camping/caravan	5.1	5.0	2.8	2.1
<i>Total 'soft' accommodation</i>	6.7	7.0	3.3	3.3
Hotels	3.2	4.9	2.5	2.5
Holiday villages	6.3	—	3.2	—
<i>Total 'hard' accommodation</i>	3.6	5.02	2.6	2.6

Source: Authors' survey

for the two study areas. Clearly, soft accommodation units make a significantly larger proportion of their business expenditures in the local and extended areas than hard accommodation units. These figures indicate that a larger proportion of the hard sector visitor spend will subsequently leak out of the region as it is respent by the business sector. In other words, the local and subregional output and income multiplier effects in the local and extended areas are likely to be greater in the soft sector than in the hard sector.

Tables VIII–X give details on unstandardized and standardized employment. Unstandardized jobs represent the actual number of jobs in existence, whether they are full-time, part-time, seasonal or casual. Standardized jobs are expressed as full-time equivalents (FTEs).

Table VIII shows that the hard accommodation sector in Badenoch and Strathspey supports more employment than the soft accommodation sector by a factor of approximately 10 for unstandardized jobs and 17 for standardized jobs. In Exmoor the pattern is the same though the difference is less marked. The particularly low number of standardized jobs in the soft sector indicates a greater proportion of part-time, seasonal or casual jobs than in the hard sector.

Table IX confirms that the hard accommodation sector produces far higher numbers of jobs per establishment than the soft sector. This is to be expected given the tendency of the soft sector to consist of small-

scale enterprises. Table X also reveals a difference in the two areas with the number of jobs per 1 000 bed nights at a lower level in Exmoor than in Badenoch and Strathspey. This is a result of the higher occupancy rates of tourism accommodation in Exmoor.

Table X shows that the soft sector produces far more jobs per unit of turnover, although standardization of jobs (into full-time equivalents) reduces this difference appreciably. Farm bed and breakfast and farm self-catering enterprises produce the highest figures in terms of unstandardized and standardized jobs. Differences are apparent between the two study areas with figures for soft accommodation in Exmoor being only slightly higher than hard accommodation. This reflects the small size of hotels in Exmoor and the well-developed nature of the soft sector.

DISCUSSION

The results indicate a number of differences and a number of similarities between the two study areas in relation to the economic effects of hard and soft tourism.

In both areas hard tourists spend about twice as much as the soft tourists on a daily basis. However, within these categories there are significant variations in spending, with camping visitors spending the least of all visitors, and hotel visitors spending significantly more than holiday village/time share visitors. Visitor spending patterns out with accommodation costs are

broadly similar in both regions, with the exception of spending on leisure, which is markedly higher in Badenoch and Strathspey for both hard and soft visitors. This implies a more formalized 'marketising' of visitor attractions in Badenoch and Strathspey and/or an absence of destinations like the open countryside for which no charge is made. The former explanation seems the most likely.

The importance of the hard tourism sector is much greater in Badenoch and Strathspey. This is largely a function of the historical development of the area over the last thirty years, with Aviemore being developed as a major hard tourism destination, and subsequently acquiring incremental developments such as holiday village/time share operations. In Exmoor, the soft tourist sector is more important than the hard sector, although the importance of camping tourists pulls down the average figure of soft tourist spending per unit of time.

The soft tourism businesses on Exmoor are on average bigger than those in Badenoch and Strathspey, while the hard tourist businesses in Badenoch and Strathspey are much larger than those on Exmoor. The tourist industry is thus much more polarized in Badenoch and Strathspey, than is the case in Exmoor.

Soft tourism businesses purchase less than a quarter of their inputs from outside the regional economy in both study areas, whereas this figure is much higher for hard tourist businesses. Thus, there is a much greater leakage of business spending out of the rural regional economies with hard tourism, although it should be noted that the differences are rather less in Exmoor, reflecting the less polarized business structure of tourism provision. Although not yet calculated, the indirect and induced effects of spending in the local economy will be likely to reinforce the advantages to the local economy generated by soft rather than hard tourism businesses.

In terms of job generation, the hard tourism sector is more important than the soft sector in both study areas. However, in terms of jobs per unit of tourist spend, the soft sector generates more employment than does the hard sector, although the low level of employment at campsites per unit of tourist spending pulls down the soft figure appreciably. The very high levels of jobs created in the soft sector in Badenoch and Strathspey represent an anomaly arising from the very low occupancy rates in the period of fieldwork. The denigration of part-time work by some critics of tourism needs to be considered in the context of individuals and households in these areas which are typically pluriactive.

The results provide a quantitative estimate of the economic benefits arising from soft tourism. In general, soft tourist enterprises are more embedded in the regional (and sub-regional) economies than hard tourist enterprises and this results in more local economic transactions and more local jobs per unit of spending than does hard tourism. However, in considering the overall effect of tourism on the local economy of Bade-

noch and Strathspey, the hard tourism sector is overwhelmingly dominant. This industry was not the product of endogenous enterprise, and has been nurtured and developed by significant public sector investment, effectively creating an externally owned, enclave economy associated with tourism.

In recent years, the Aviemore centre has been in decline, and there is evidence of decaying infrastructure and a need for renewal and revitalization. This may illustrate the decline phase in the tourism development cycle (Butler 1980), and might be expected to be a characteristic of destinations which have received major injections of investment over a short period of time. In contrast, soft tourism has less emphasis on large-scale, tourism-specific investments, and is thus less likely to be associated with a decaying tourist infrastructure. However, because of its inter-relationships with other economic sectors (such as agriculture), it is not inconceivable that the potential for soft tourism could be weakened by decline in those other sectors. For example, desertification in many parts of Europe arising from the decline of farming and other primary industries has resulted in a decaying rural infrastructure and a decline in the quality of the cultural landscapes, which does little to enhance tourism potential. A similar problem may exist in rural areas of CEE countries, where there may be elements of a decaying infrastructure, derived from the farm structures of previous regimes.

In the development of rural economies, tourism will undoubtedly figure as a component of plans in many areas. Where tourism is being promoted, development agents and agencies will be faced with a choice between the development of small-scale enterprises, rooted in particular locales, and the creation of larger scale, externally owned, hard tourist businesses. Whilst the smaller enterprises may generate proportionally more benefit to the local economy, the pressures for rapid development and the ease of planning and administration of a few major public support schemes may push agencies towards the promotion of hard tourism. In addition to generating proportionately less benefit to the locale per unit of visitor spend, there may be higher levels of social disruption, cultural dilution and environmental damage arising from hard tourism.

The findings of this paper relating to the economic dimension of different styles of tourist development need to be considered alongside socio-cultural and environmental aspects. Small-scale rural tourist enterprises, although often dependent on wider markets, can be seen as an endogenous adjustment strategy (Slee 1993). As such, they are likely to be embedded in existing social and cultural contexts. Small-scale simple commodity producers are also likely to create a tourism sector which is relatively resilient, in that they are better able to withstand volatilities in tourist markets, because they are normally less dependent on tourism for their well-being than full time tourist businesses and are able to take advantage of low paid or unwaged

family labour. In addition, where tourism is embedded in the functioning rural economy, there is potential for synergy with environmental management, which enhances the area's appeal for tourism and the tourist enterprises. Where tourism is enclave-based and large-scale, the relationship between the tourist and the environment tends to be more predatory. Thus the debate about appropriate styles of tourism development can, and should, be seen as part of a much wider debate about the creation of more sustainable rural economies.

This study offers a methodology and a survey-based method which can be used to assess accurately the economic effects of different styles of tourism on the local and regional economies. Given that the use of rural tourism as a development strategy has generated much rhetoric and little in the way of reliable economic data, any attempt to create a situation in which more informed choices about the future of rural areas can be made is to be welcomed. This economic understanding should be considered alongside information on the social and environmental impacts of different types of tourism developments in order to derive strategies for tourism in a rapidly changing rural economy.

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Contact address:

Bill Slee, Department of Agriculture, University of Aberdeen, 581 King Street, Aberdeen AB9-1UD, U. K.,
fax: 01 224-273 731, 01 224-276 012

DEFINING AND OPERATIONALISING FAMILY FARMING – THE VIEW OF A SOCIOLOGIST^{1,2}

DEFINOVÁNÍ A OPERACIONALIZACE RODINNÝCH FAREM – POHLED SOCIOLOGA

G. Djurfeldt

Department of Sociology, Lund, Sweden

ABSTRACT: This paper discusses the problem of developing an ideal-type definition of family farming which can be used in comparative and longitudinal studies of agrarian structure. The definition is formulated in contrast to an economically inspired concept of family business farm. Sociologists are urged to develop and use such definitions in order to be able to answer one of the basic problems of the discipline, i.e. about the prevalence, development and likely future of family farming.

family farm, definition, operationalization, rural sociology

ABSTRAKT: Práce se zabývá problémem vytvoření ideální definice rodinné farmy, jež by mohla být používána pro komparativní a dlouhodobé studie agrární struktury. Tato definice je formulována rozdílně od ekonomicky podmíněné koncepce rodinné farmy. Sociologové jsou k vytvoření a užívání takovýchto definic vedeni potřebou dát odpověď na jeden ze základních problémů své disciplíny, totiž na otázky týkající se převahy, rozvoje a pravděpodobné budoucnosti rodinných farem.

rodinná farma, definice, operacionalizace, rurální sociologie

This paper discusses the problem of developing a formal definition of family farming, and the problem of operationalising it. The contention is that only by working in that direction will rural sociology be able to answer one of the basic problems of the discipline, i. e. about the prevalence, development and likely future of family farming.

In principle there are three types of definitions of family farming circulating, and a number of more or less ad hoc operationalizations. The problems with these is that most definitions are not truly formal, i. e. they are too marked by the context in which they were developed. Similarly, operationalizations tend to be *ad hoc*, for example locating family farms within certain acreage or income brackets. The problem with contextually bound definitions and *ad hoc* operationalizations is the usual problem of empiricism, i. e. that research gets stunted. It becomes difficult to study development over time (i. e. as contexts change), and to make comparative studies of family farming and agrarian structure. In this paper I will propose a formal definition of family farming, and sketch ways of operationalising it. I do so in contrast to the definition proposed by Gasson and Errington (G & E 1993).

In their eminent review of rural sociology research on family farming, G & E work an ideal type which they call the 'family business farm'. They define it as follows:

There are six elements to our definition of a farm family business:

1. Business ownership is combined with managerial control in the hands of business principals.
2. These principals are related by kinship or marriage.
3. Family members (including these business principals) provide capital to the business.
4. Family members including business principals do farm work.
5. Business ownership and managerial control are transferred between the generations with the passage of time.
6. The family lives on the farm. (ibid. p. 18)

G & E stress that this is an ideal type, and that they have not tackled the problem of operationalization, and mention that such an attempt would have to confront the problem of distinguishing between family business farms and sub-family farms, i. e. farms where household members are much drawn into pluriactivity and off-farm work.

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Furthermore, G & E explicitly refrain from working with a concept of *family labour farm*. This is a second variety of definition, where in addition to some or all of the above defining characteristics, we would have to add another one, saying that a family farm by definition to a large extent also draws on family labour for its operations. As we will see below, such a definition entails a number of problems which are difficult to cope with.

If G & E had included the labour criterion in their definition of the family business farm, they would have come close to what I call 'the notional family farm', which is an alternative conceptualization of the ideal type that I propose we should have in mind when we speak of family farms. In earlier publications, colleagues and myself have tried to define and operationalise the notional family farm (A threya at al. 1991; Djurfeldt and Waldenström forthcoming).

The problem with G & E's definition in my view is that it is not formal; it is too contextually bound to contemporary British farming to be a sharp-cutting tool for comparative studies, be it over historical time, or between different societies. My alternative proposal is a definition which is more formal, and which therefore promises a sharper edge for our research. In contrast to G & E, I propose that we include the labour criterion in a formal definition of farming. I suggest we define the 'notional family farm' somewhat like the following:

- 1) The notional family farm is characterised by overlapping between three functional units: (a) the unit of production (i. e. the farm), (b) the unit of consumption (i. e. the household) and (c) the unit of kinship (i. e. the family).
- 2) For its reproduction, the notional family farm requires family labour, i. e. labour performed by members of the family/household, (and here we are not referring mainly to managerial work).

Note that the second element of the definition combines a labour criterion with what I call a reproduction criterion. We will discuss that combination below, but first we will discuss the logical structure of the definition, and subject G & E's definition to a logical scrutiny.

Like G & E's definition, the proposed definition is an ideal type, but it is more than that. It is a formal or analytical definition drawing on terms in a theoretical discourse. The advantage with this type of definition is that, on the one hand, by being relatively³ context-free, it opens up possibilities for empirical and comparative research. On the other hand, the definition also has the advantage of embodying some of the notions

that we usually have in mind when we speak of family farming, but it does so in a much more stringent manner than what is usually the case.

Comparing my definition with that of G & E, another important difference is obviously that of labour. One of my points of contention with G & E is whether the labour input by the family should be part of the definition of an ideal typical family farm or not. My argument is that it should.⁴ We agree that defining a family farm only in terms of a labour criterion is not acceptable. We disagree about how appropriate it is to include labour *among the criteria* of definition.

ARGUMENT FOR AND AGAINST

G & E arguments boil down to three *against* including a labour criterion in the definition, and another two arguments *for* their own way of defining the farm family business. Against the inclusion of a labour criterion, they argue that:

- [1.1.] The definition is not tenable in practice because the demand for hired labour in family farms varies during the family life-cycle, seasonally etc. (ibid. p. 14).
- [1.2.] The distinction between family-labour farms and farms dependent on hired labour 'does not seem to correspond to the experience of farm people' (ibid. p. 15).
- [1.3.] For various reasons, it is difficult to operationalise a concept of family-labour farm (loc. cit).

Arguments [1.1] and [1.3] both quote the difficulties in operationalising a labour criterion. I will come back to this below, and discuss the techniques for overcoming those difficulties. Argument [1.2] on the other hand refers to the experience of ordinary people, and claims that because people presumably do not recognise the distinction between family labour farms and labour-hiring farms, the distinction is not valid. It goes without saying that this is a light-weight argument because it cannot be demanded of formal definitions that they should correspond to everyday concepts. Eliminating [1.2], the arguments *against* the labour criterion thus boil down to the operational ones.

It is true almost by definition that an ideal type is difficult to operationalise, and this certainly holds also for G & E's own 'farm family business'. We cannot hold it against an ideal type that it is difficult to operationalise, because types by definition are non-operational. At the most, this argument could be used together with a series of others when we compare the relative merits of two ideal types.

3 One can discuss to what extent the definition would be applicable, for example in a context where production is completely embedded in other structures (primitive society, state socialism), or where the family consumption units do not overlap, like in much of Africa. Here too, the function of the ideal type could be to open up for empirical research. One of the outcomes of such research ideally should be further refinements of our conceptual tools, e. g. an increased formalisation of concepts like that of family farming.

4 P l a n c k (1987) has argued in the same direction.

Let us now look at G & E's argument for their own definition, which excludes the labour criterion. These are:

[2.1] 'We firmly believe that family ownership and control of the business has important implications quite apart from the use of family labour. Indeed, we suggest that in some ways family relationships may be *more* significant for the operation of the larger farm, for instance with regard to succession.' (ibid. p. 18)

[2.2] 'As time goes on, capital (mainly in the form of machinery) is helping to overcome the limitations which reliance on family labour imposes on the family-worked farm. This is a crucial point. When the major inputs for agricultural production were land and labour, the scale and nature of activities on family farms were determined to a great extent by the labour the family was able to supply. Production was heavily dependent upon the number of children, stage in the family cycle, the age and health of the operator and spouse. Increased dependency on capital means that business size is no longer constrained by the family labour supply. Fluctuations in the quantity and quality of labour available over the phases of the family cycle can be significantly reduced by mechanisation.' (ibid. p. 19)

I must confess that I do not fully understand the first argument [2.1], but I take it to mean that while, according to G & E, we can dispense with the labour criterion, we cannot dispense with family ownership and control of the business when we discuss family farming. I would agree to the latter. If by ownership and control of the business we mean, not necessarily ownership of the land and of the machinery, but control and management of the production unit (i. e. the 'farm business') by the family/household, then it is sensible to include it in an ideal-type definition of the family farm. Obviously, we would again meet with problems in operationalization, for example when tenancy or indebtedness transfer much of that control to outside agents. Once more however, I want to defer the discussion on operationalization until later.

G & E's second argument [2.2] for their own definition is that capital is replacing labour as the main factor of production in agriculture. What shall we make of this? Obviously it is true that capital and labour-saving technology play an increasing role especially in West European and US farming. Thus it is true that 'increased dependency on capital means that business size is no longer constrained by the family labour supply'. But does this warrant excluding labour from the definition of the ideal type?

As far as I can see, there is an implicit assumption in G & E's argument, viz. that the introduction of labour-saving technology in farming reduces the importance not only of hired labour, but also of family labour. That assumption is not warranted. Looking historically

at the mechanization of farming, its major effect has been to bring down the input of hired labour in farming. As a consequence of this displacement, family labour has increased in relative terms and, on full-time farms, it has if anything increased the labour burden carried by farm family members also in absolute terms.

FURTHER ARGUMENTS

One can hold it against G & E's definition that by merging family-labour farms with family-managed farms they collapse an important distinction. Whether people recognise the distinction or not, there are important differences between the two. When hired labour becomes necessary to the reproduction of a farm, it has important implications for its way of functioning. An additional fixed cost is added to the farm budget, implying new parameters for its options to economise. The comparative advantage of the family farm, namely that (family) labour is not a fixed cost is partly or wholly lost. This remains the crucial interface – the Chayanovian interface, if you like – between family and capitalist farming, and G & E approach may muddle that distinction.

Another question is: What does G & E's definition imply in empirical terms? Assuming that it is properly operationalised, what picture would it be expected to give of the agrarian structure in Western Europe and the US? It is well-known that much of corporate farming in reality also is family business farming, incorporated mainly for tax reasons. Leaving aside the 'sub-family farms' and the definition of these, family farming by G & E's definition is well-nigh universal in Western agriculture. Their definition is therefore not very useful for studying agrarian differentiation or stratification, since it collapses strata, rather than opening up for the definition and identification of them. In this respect too, I would claim that the concept of notional family farm is a better tool for sociological research, because, as I will show, it can be a tool for studying agrarian structure and differentiation, including how they change over time.

Thus, and although I am a great admirer of G & E's work, I propose that rural sociologists avoid uncritically swallowing G & E's definition, which may be more useful to economists. We should devote our energy to developing a definition of family farming which draws on, rather than obliterates, the Chayanovian interface. The concept of notional family farm is an attempt to formulate such a definition. Turning back to that definition, we see that it is made up of two elements. The first of these can be labelled a structural one, since it places the notional family farm at the interface of three structures, i. e. the structures of production, of consumption, and of kinship. This is another way of saying that the notional farm receives some of its characteristics from each one of these structures. Because the unit of production is concurrently a

unit of consumption, its mechanisms for mobilising and remunerating labour becomes distinctive, an insight first systematically formulated by Chayanov. But the unit of production is also a family, i. e. a unit in the kinship system which in its turn imputes some distinctive features to it, for example its possibilities of drawing on kinship and community networks for labour and services. Similarly, transfer of ownership often occurs via kinship and inheritance.

I would claim that the structural element in the definition of a notional family farm contains several of the elements used by G & E in their definition (i. e. their elements 2, 3, 5 and 6). My own more analytical way of putting it has the advantage of opening up for investigation of how these structures intersect in a given social and historical context. This should make the proposed definition more widely applicable, in comparison to the contextually specific definition proposed by G & E.

But the notional family farm definition also contains a second element combining two criteria, i. e. the labour criterion already discussed, and what I call a reproduction criterion. Several authors, some of them quoted by G & E (ibid. p. 13–14), have used similar combinations, so I do not claim originality here. As will be shown, it is possible to operationalise this definition with varying degrees of precision, and thus it fulfils another important requirement of an ideal type. But before coming to that, we will discuss an important attempt to operationalise a labour criterion of family farming.

OPERATIONALISING THE CONCEPT OF FAMILY LABOUR FARM

As already pointed out, I share G & E's scepticism towards the concept of *family labour farm*. Still, I regard as important the attempt by the Indian Marxist economist Utsa Patnaik to operationalise such a concept (1987). At the same time, I have important reservations to her approach, and I propose changes to her procedure which she presumably would not agree to. Her approach is based on the labour theory of value, and the notion that labour units (i. e. days or hours) have equal value, that they thus can be added and that, as quota scales, all types of arithmetic operations are allowed when working with such variables. I do not subscribe to the labour theory of value, and I do not use labour units to calculate levels of exploitation in Marxian terms. Still I think that counting labour units is a valuable way of operationalising the concept of family labour farm, and when it comes to the arithmetic of doing it, I follow in the foot-steps of Patnaik.

Patnaik's research is set in an Indian context, where it is common for farmers both to hire labourers to work on their own farms while, not literally at the same time, but usually in the same season, they themselves seek employment as agricultural labourers in other and often

neighbouring farms. In such a context it is not immediately relevant to talk of 'labour-hiring' farms versus agricultural labour farms, since a large share of all farms are both. This is the reason for introducing the concept of *net hiring-in*, which is defined as the difference between the amount of labour hired-in on a farm, and the amount hired-out by the farm household. I. e. in algebraic terms:

$$H' = H_1 - H_0 \quad (1)$$

where:

H' = Net labour hired-in, measured for example in days or hours

H_1 = Gross labour hired-in by the farm

H_0 = Gross labour hired-out by the farm household.

Calculation of net labour hired-in obviously eliminates the problems of most farming households being positive both in terms of hiring-in and hiring-out, and makes it possible to define farms as net hirers-in, and farming households as net hirers-out. But to be able to identify the family labour farm, we have to perform yet another calculation, namely to divide net labour hired-in (H') by the total amount of family labour on the farm (F).

Comparing net labour hired-in with total amount of family labour, we for example get farms which are net hirers-in, but where the amount of labour hired-in is less than that put down by family members themselves on the farm. Comparing such farms with farms where net labour hired-in exceeds that put in by the family itself, it would seem sensible to say, as Patnaik does, that the latter exploit hired labour, while the former depend more on their own than on hired labour. This notion is elegantly captured by a formula:

$$p = H'/F \quad (2)$$

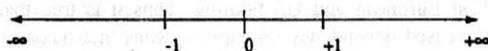
where:

H' = is defined as above, and

F = total amount of family labour put into farming.

This way of proceeding solves some of the problems with the labour criterion which G & E mention. By defining net hiring-in, seasonality can be handled, and similarly, by defining F we can handle the variations in the supply of family labour during the life-course of the family, for example.

We can plot some values of p on an axis running from $-\infty$ to $+\infty$:



The four segments are (with possible labels within brackets):

- 1) $p > 1$ – farms where net hiring-in is higher than the own input of family labour (labour-hiring farms),

- 2) $0 > p \geq 1$ – farms where net hiring-in is positive but lower than the input of family labour (family labour farms with some hiring-in),
- 3) $-1 \geq p \geq 0$ – farms where net hiring-in is negative but lower than the input of family labour (family labour farms with some hiring-out),
- 4) $p < -1$ – farms where net hiring-out is higher than the input of family labour (agricultural labour farms).

To use this operationalization in a European or American context requires a substantial modification, since it is very uncommon for farmers to hire-out as agricultural labourers (which would seem to be a phenomenon restricted to predominantly agrarian economies). What is very common in Europe and the US, however, is pluriactivity involving a straddling of the agrarian and non-agrarian sectors of the economy. It is very common for farmers and their families to have jobs besides farming, be it in industry or in services of various sorts, including employment in the public sector.

To adapt Patnaik's index for use in a Western context, we need only redefine H_0 as involving not only hiring-out of agricultural labour, but all off-farm labour. I. e. ideally we should include in H_0 not only off-farm employment, but also self-employment, since, for example, running a road-side café is a form of pluriactivity which in this connection we can count as equivalent to for example factory work. Obviously, this would not hold in a labour theory of value context, but if our aim is to distinguish pluriactive farms from others, it is indeed a sensible way of doing it. Besides redefining H_0 we need only adjust labels (3) and (4) to read, 'family labour farms with some pluriactivity' and 'pluriactive farms', respectively.

Besides operationalising the concept of family labour farm, then, this modification of Patnaik's index has the advantage of allowing us to operationally define pluriactive farms, as well as farms relying on hired labour. Thus it would seem a valuable instrument in studying agrarian differentiation as well.

As shown elsewhere (Athreya et al. 1990, Ch. 6; Djurfeldt and Waldenström, forthcoming), Patnaik's index has drawbacks which imply that it cannot be used as a stand-alone index of agrarian differentiation. Its main weakness is that it assumes that the pattern of labour-use on farms is determined only by economic scale and by family size and composition. Thus one would expect the labour-hiring farm to be a big unit which is far from being always the case. Small units, in area as well as in economic terms, may very well be labour-hiring, and for various reason. The farm-

ing family may have remunerative off-farm employment, which allows them to replace with hired labour what under other circumstances would have been family labour. Or, to take another example, the farmer may for various reasons be unable to perform what under normal circumstances would be family labour. In the Indian context, we often meet with widows who own small parcels of land. Going by the size of the farm, we would have expected a negative net hiring-in, but since widows of many castes do not perform field labour at all, they are forced to resort to what in relative terms is massive hiring-in. From a sociological point of view, it is obviously not meaningful to place these farms in the same category as big labour-hiring units, as Patnaik's index does. Similar deviations from the ideal-typical pattern of labour-use is met with in a European context (see Djurfeldt and Waldenström op. cit).

Thus there are important drawbacks in using a labour criterion for defining the family labour farm, as Patnaik does.⁵ My thesis, however, is that these drawbacks can be overcome if one combines the labour criterion with a reproduction criterion, as in done in the definition of the notional family farm.

OPERATIONALISING THE REPRODUCTION CRITERION

It is by no means an easy matter to operationalise a reproduction criterion of family farming. To approach the issue, we must first address the question of definition. Let us define a *family reproduction farm* as a farm where the income (in cash and kind) suffices to cover the consumption needs of the household, and the costs of reproduction of the farm itself, i. e. tools and machinery, buildings etc.

While the labour criterion centres on a notion of labour surplus and labour deficit, the reproduction criterion focuses on the notion of an economic surplus above reproduction level, versus the notion of non-reproductive farms, i. e. farms where the incomes do not cover the costs of reproduction, and where the household members seek other sources of income.

The main problem in this definition is that the reproduction needs of the household is no objective entity, but a subjective one. Different families have different reproduction needs, and, moreover, reproduction needs vary over time and space. There are different approaches to this problem. One convenient way is to set normative a level of reproduction as equal to, for example, on the individual level, the ruling wage rate in agriculture or in industry. This approach furthermore requires some norm for translating the individual level figures to household level, by for example working

⁵ One can direct a similar criticism against Hill's attempt (1993) to use a labour criterion and Eurostatistics to study agrarian structure in EU. Singling out labour-hiring farms by means of official statistics implies a measure of imprecision, and does not leave family farms as a remaining category, since pluriactive farms cannot be distinguished by these means.

with a concept of consumption units. Obviously, this is an approximate solution with some drawbacks. One drawback is that many families with conspicuous consumption habits will consume much above the normative level, and thus 'eat surplus', while other, and more miserly ones, will be able to tighten their belts and save money out of what is normatively set as a consumption fund.

We have no reasons to demand of an operationalization that it should exactly render the formal, abstract notion which it attempts to catch. It lies in the nature of measurement (cf. P a w s o n 1989) that it entails problems of imperfection. This should not lead us to refrain from attempting to measure, since that entails renouncing the ambition towards formality, and the acceptance by fluke that research is bound to be empiricist.

OPERATIONALISING THE NOTIONAL FAMILY FARM

The ideal data-set operationalising the concept of notional family farm is a farm budget study involving not only a budget of cash expenses and income, but preferably also an account in physical terms, both of labour and of the other transactions.⁶ Labour data are obviously called for to operationalise the labour criterion, while data on transactions in kind are called for if we want to catch what goes on outside the market in terms of labour exchange systems, distribution of products and services outside the market and within kinship and community networks etc. As one colleague put in: the approach is 'hungry for data'.⁷

But fortunately, we can come a bit on the way with less than that. In D j u r f e l d t and W a l d e n s t r ö m (op. cit) we had elaborate time-use data, while the budget data were more rudimentary. To operationalise the reproduction criterion, we had to make do with questions asking respondents to rank the importance of various sources of income. Still, the result proved good enough to throw up a number of interesting results. Another way of operationalising the concept of notional family farm can be found in B a r l e t t 's work (1993). By using a strictly defined typology, she is able to show how the agrarian crisis affecting US agriculture in the beginning of the 80s had worse effects on labour-hiring farms. She also lays bare the exact mechanisms for the resilience of the family farms. Though limited to parts of one State, i. e. Georgia, it raises important questions about the 'disappearance of the middle thesis'.⁸ The research on that thesis suffers from *ad hoc* operationalization of 'the middle', and is

limited by a cross-sectional rather than longitudinal methodology, as the one adopted by Barlett.

Another example is the paper by M o r e l l (1995): He has been able to use what in principle is agricultural census data to operationalise a concept of notional family farming.⁹ Although this type of data do not permit the greater rigour that farm budget data would allow, the operationalization is precise enough to make it possible for Morell to demonstrate a remarkable stability in the Swedish agrarian structure from the 1930s to the 60s. It is also noteworthy that the agrarian structure in the 60s closely resembles that picture which was thrown up in my own secondary analysis (D j u r f e l d t 1990) of land register and tax return data from 1987.¹⁰ Here again the methods of operationalization, as well as the data-set, were different, but it is an indication of the robustness of the method that the results were comparable. To go by these data, a major difference between the 60s and the 80s is in the proportion and the economic weight of labour-hiring farms. While this farm type appears to have had a stable position for several decades, it appears to have increased in importance since the 60s. This finding leads to important questions about the effects of agrarian policies, the professed aim of which were to promote family farming. This in turn indicates that method proposed here could also be a valuable for evaluating agrarian policies with such aims.

CONCLUSION

Based on the discussion in this paper, I propose that rural sociologists reject the concept of family business farm which recently has become so popular, and that they strive to develop formal definitions of family farming which, by being formal, are suitable tools for comparative and longitudinal research. I have proposed such a definition of what I call a *notional family farm*, and I have shown that it permits operationalization with varying degrees of precision. Attempts to use it have thrown up interesting indications of the resilience of family farming, of the stability of agrarian structures over time, and have indicated that the method is a robust one. Finally, I suggested that the notional family farm is a useful tool for evaluating the effects of agrarian policies. Based on this type of approach, I would like to see rural sociologists initiate cross-national projects for the study of agrarian structure and its development. In view of how central the notion of family farming is to the discipline, there can be no doubt about the priority of such projects.

6 Such a data-set is used by A t h r e y a et al., in their study (op. cit).

7 Barbara Harris, personal communication.

8 Cf. B a r l e t t 1986 and the debate summarised there.

9 Although he does not use that term.

10 Landbruksekonomiska Samarbetsnämnden 1988.

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Contact address:

Goran Djurfeldt, Department of Sociology, P.O. Box 114, S-221 00 Lund, Sweden, tel. +46 46 222 8870, fax: +46 46 222 4794, e-mail: Goran.Djurfeldt@soc.lu.se

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Scitex	*.SCT
Targa	*.TGA
Tag Image File Format	*.TIF

Redakce časopisu

THE GREAT DISTRIBUTION IN VENEZUELA AND ITS LIKELY IMPLICATIONS FOR AGROFOOD SECTOR¹

VELKODISTRIBUCE POTRAVIN A JEJÍ PŘEDPOKLÁDANÉ DŮSLEDKY V ZEMĚDĚLSKO-POTRAVINÁŘSKÉM SEKTORU VENEZUELY

A. Morales Espinoza

Dept. and Institute of Agricultural Economy and Social Sciences of the Faculty of Agronomy at the Universidad Central of Venezuela, Venezuela²

ABSTRACT: The purpose of this study is to review the actual transformations which are occurring at the food distribution system, as cause of the insertion of "Makro Comercializadora S.A." firm in Venezuela. To reach the proposed goal was necessary, at the first moment, to investigate about the changes that are occurring in the agrofood sector of the developed countries, especially those aspects which concern the food's distribution and the conformation called: "Great Distribution". After detaching the intensive internationalization process of the "Great Distribution", the author proceeded to describe the changes which occurred in the Venezuelan food distribution system since the "Makro Comercializadora S.A." instauration. Using as a support the direct verifications and antecedents which have been compiled before, the author glimpsed the probably implications of this referred instauration not only on the economic agents but also for those localized on the conjunct of the Venezuelan Agrofood Sector.

Venezuela, agrofood sector, great distribution

ABSTRAKT: Účelem této studie je poskytnout přehled o aktuální transformaci probíhající v systému distribuce potravin ve Venezuele jako důsledek vstupu akciové společnosti „Makro Comercializadora“ na venezuelský trh. K dosažení tohoto cíle bylo v první řadě zapotřebí zkoumat změny odehrávající se v současné době v zemědělsko-potravinářském sektoru rozvojových zemí, zejména ty jejich aspekty, které se týkají distribuce a zvláště „velkodistribuce“ potravin. Poté, co je ve studii analyzován intenzivní internacionalizační proces „velkodistribuce“, pokračuje autor charakteristikou změn, k nimž došlo v distribučním systému potravin ve Venezuele po vstupu akciové společnosti „Makro Comercializadora“. Autor se snaží s použitím přímé verifikace a zkušeností z předchozího vývoje odhadnout pravděpodobné dopady uvedeného vstupu nejen na bezprostřední ekonomické činitele, ale na všechny, kteří jsou v nějaké souvislosti se zemědělsko-potravinářským sektorem Venezuely.

Venezuela, zemědělsko-potravinářský sektor, velkodistribuce

This work has been carried out with the aim of studying the transformations which are taking place in the urban food distribution system as a result of the introduction into Venezuela of the so-called "Great Distribution". This introduction has come about following the constitution of *Makro Comercializadora S.A.* set up through the association between SHV (a Dutch company with an important participation from the German group, Metro) and the Venezuelan group called *empresas Polar*.

In order to achieve the proposed objective, it has first been necessary to ascertain the changes which have been taking place in the models of production, distribution and consumption of food in the developed countries in general and in Europe in particular, es-

pecially concerning those aspects which affect food distribution. After having pointed out the intensive process of internationalization of so-called "Great Distribution", a second step was aimed to describe the structure and characteristics of food distribution in Venezuela up to establishment of *Makro Comercializadora S.A.* Then, and on the basis of direct observation and with the antecedents collected up to this part of the work, the third phase was a study of transformations produced in the aforementioned structure. At the same time, it has been possible to perceive the implications of the entry of *Makro*, not only for the agents located in the distribution framework, but also for those situated inside the agrofood sector.

¹ Paper presented at the European Congress of Rural Sociology, Prague 1995

² Visiting Professor in the Department of Agrarian Economy, Sociology and Policy at the University of Cordoba, Spain

The aspect mentioned at each of stages previously referred to are hereby expounded:

1. With regard to the transformations being experienced in diverse "components" of the agrofood system in developed countries (especially in the European agrofood system), it should be pointed out that these mutations have particularly taken place in the food consumption area, in such a way that the present-day consumer has practically rejected mass consumption and has opted for diversity in products. This has brought about, concomitantly, a transformation in the agroindustrial productive system which has had to respond to this type of consumption with a highly differentiated production. Although the transformations observed in this new form of producing food are of importance, the changes in product merchandising and distribution which have been fundamental in linking the agrofood industry to consumers have been much more dramatic. These changes which in some way have been specified in the structuring of the "Great Distribution", carry, as it is to be expected, a close resemblance of the society which originated them and are a corollary of a real transmutation of food production, distribution and consumption models which have occurred in some countries in Europe. It would therefore not be out of line to affirm that a "transplant" of the "Great Distribution" in Venezuela will cause serious distortions within its agrofood sector due to the fact that its evolutionary process is, obviously, very different from that occurring in Europe and the ways of producing, distributing and consuming food in Venezuela are clearly different from those prevailing on this continent nowadays. Furthermore, it is necessary to make a reference to two basic characteristics which distinguish the present food distribution system in some European countries: a) a high degree of concentration and b) an intense process of internationalization. With regard to the latter, it should be mentioned that both French and German groups have not only made investments in Europe but also outside it, so that Argentine, Brazil, Mexico and Venezuela among others can count themselves as being on the investment agenda of those groups.
2. With regard to the aspect concerning food distribution before the advent of *Makro*, it can be said that at least until 1992, this framework was basically made up of a traditionally wholesale sector (grocers', small stores, bakers', fruiterers', butchers', the so-called municipal markets and the street stalls) along with which there are registered retail stores with characteristics which are typical of the modernization of this sector such as: a) commercial retail sale points or self-service supermarkets, individual or in chains, b) the agroindustries themselves which act as agents and participants in the distribution by means of wholesaling the products

they manufacture and c) the increasing presence of catering and fast food. Regarding the distribution of these outlets, it can be said that traditional stores' market share is 46%, individual supermarkets' 40% and supermarket chains 14%. Before concluding this section and order to connect it with the following one, it should be pointed out that the structure we are describing began to undergo a very important change starting from the inauguration of the first *Makro* premises in 1992 in Caracas (in the Urbina). From that date on, the conditions of food merchandising and distribution have been changing in a very noticeable manner as a result of the presence of the firm which is the subject of this study.

3. With regard to the changes observed and the repercussions which could be derived from the operations of this firm, which in slightly less than two years has opened four establishments, it could be said that the presence of *Makro* certainly represents an extraordinary innovation in the functioning of the merchandising system in Venezuela; among other aspects, because of the incorporation of different modes of organization and of information technology which have permitted an efficient management of the distribution channels and a high degree of optimization in stock-handling and logistics operations. As can be easily assumed, these techniques must have permitted this firm to increase efficiency related to stock rotation, to reduce operational unit costs and to increase significantly its business profits. Moreover, the possibility of postponing the time-lapse for corresponding payment to suppliers provides this firm with a clear advantage and an obvious patent superiority over its competitors. Such superiority may signify, as will presently be seen, a position of authority and an ability to dictate the dynamics of the whole Venezuelan agrofood sector, i.e. the dynamics of the constitutive "part" of that sector, including the up to now "omnipotent" agrofood industry. If this is the case regarding its suppliers, the position in relation to its "customers" (as will be seen in the next section) does not greatly differ since a reduction in costs has not necessarily resulted in lower prices for the consumer. Furthermore, it should be pointed out that the increase in size of this Company, concomitant with a concentration in its holding of assets, has important implications for the whole of the agrofood sector, mainly for the economic agents located in the food distribution system, for suppliers and for the agrofood industry. These aspects are outlined as follows: the presence of *Makro Comercializadora S.A.* has in fact meant a reduction, both absolute or relative, in some traditional wholesalers and retailers, both polyvalent and specialized ones (mainly grocers' and small stores) located in areas where the *Makro* premises have a greater influence; and as the marketing power of this firm increases and eventually other similar firms are

able to set themselves up in Venezuela, the urban food distribution system will change substantially. The majority of the small establishments will gradually be replaced and the concentration will continue to increase. The position of suppliers of processed product which are different, of course, from those proceeding from *empresas Polar*, should not differ, since *Makro*, because of the way it operates, would have the possibility of delaying its payments up to a period of 90 days and this logically would cause a series of payment deterrents and mean that these firms would be compelled not only to provide for their own financial requirements but for those of *Makro* as well.

As far as the Venezuelan agrofood industry is concerned, it will gradually have to give up its distribution function in order to adapt itself to the new situation. Moreover, under these conditions, it will be obliged to make its strategies *compatible* with the strategies of the "Great Distribution" and will have to be subjected to all kinds of requirements of a technical and organizational nature. Therefore, in this way it would lose what up to now has been its hierarchical and authoritative role in the activities carried out by the economic agents which make up the agrofood sector.

Finally, it should be mentioned that the situation described in the last part of the article will probably worsen. Unlike Europe, where the existence of an integrative and mutually participative process regulated by the State is easily verifiable, in Venezuela, starting from the application of the Adjustment Program, it has been proposed to limit the action of the State, the only body capable of regulating the multiple relations established between the agents which operate within the corresponding agrofood sector.

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Contact address:

Augustín Morales Espinoza, Universidad de Córdoba, Departamento de Economía Sociología y Políticas Agraria, Alameda del Obistro s/n, Apartado 3048, 140 80 Córdoba, Spain, tel: 99 570 21 84 71/800, fax: 99 570 21 85 39

O SPOLUPRÁCI RURÁLNÍCH SOCIOLOGŮ Z ČESKÉ ZEMĚDĚLSKÉ UNIVERZITY V PRAZE A UNIVERSITY OF MISSOURI, COLUMBIA, USA

Na základě podepsané smlouvy se v roce 1995 rozvinuly kontakty mezi rurálními sociology České zemědělské univerzity (ČZU) v Praze a University of Missouri (UM-C). V září 1995 jsme pobývali na UM-C, abychom tam reprezentovali ČZU a vlastní práci v našem oboru a také proto, abychom se seznámili s organizací a obsahem výuky a výzkumu v oblasti rurální sociologie na UM-C.

Vypracovali jsme společný výzkumný projekt, s kterým se s našimi americkými kolegy budeme ucházet o podporu. Výzkum by byl zaměřen k otázkám motivací, postojů a záměrů vlastníků půdy při současné změně českého venkova a zemědělství. Přitom máme na zřeteli možný střet ekonomických a ekologických zájmů. V závěrečné části pobytu jsme diskutovali o možnosti ustavení mezinárodního institutu pro sociologický výzkum v oblasti venkova a zemědělství střední a východní Evropy. Bylo to možné, neboť současně s námi v té době byli na UM-C na stáži také ruští a rakuští kolegové.

Velký zájem pedagogů a výzkumných pracovníků na Fakultě zemědělství, potravinářství a přírodních zdrojů UM-C (kam patří katedra rurální sociologie) vzbudil film „Všichni dobří rodáci“, kterým jsme doprovodili výklad vývoje českého venkova a zemědělství v druhé polovině 20. století.

Pokud jde o odbornost, ve které pracujeme, vyplývá ze všech nabytých zkušeností jeden silný dojem. Nejlépe bych ho vyjádřila jako politování nad dvěma skutečnostmi. Za prvé jde o to, že výuka rurální sociologie nebyla po dvacet let součástí studia na ČZU. V těchto dvaceti letech došlo k podstatnému obratu v tzv. sociologických paradigmatech, zasahujících pochopitelně i rurální sociologii. Vzhledem k tomu je dvacetiletá mezera, znamenající přerušení pracovních kontaktů a práce typu základního výzkumu, dost citelná. Druhou politováníhodnou skutečností je oddělení výzkumu od vysokých škol, ke kterému došlo. Snad proto se vytvořila praxe, podle které výše pedagogického úvazku na ČZU nedovolí pedagogovi věnovat se systematicky výzkumu, má-li onen úvazek současně plnit.

V dalším textu považuji za zajímavé rozvést informace o obojím – výuce v rurální sociologii a o výzkumu v téže oblasti, resp. o jeho organizaci na UM-C.

Výuka v rurální sociologii

Na Fakultě zemědělství, potravinářství a přírodních zdrojů je katedra rurální sociologie zařazena jako sou-

část širší jednotky sociálních věd (spolu s katedrou zemědělské ekonomiky, katedrou zemědělského vzdělávání a centrem komunitních rozvojových programů). Učitelství sbor katedry tvoří pět profesorů a šest docentů. Na katedře pracuje také šest výzkumných pracovníků. Nejčastější specializace pedagogů-rurálních sociologů jsou následující:

- sociologie zemědělství
(akcent je kladen na sociální vztahy a struktury v zemědělské výrobě a při zpracování a marketingu zemědělských výrobků, na formy organizace v zemědělské vertikále, na mocenské vztahy přítomné v organizaci při využívání lidských, přírodních a technologických zdrojů v zemědělství, na dopady makrosociálních procesů v lokálních systémech);
- environmentální sociologie
(zaměřuje se na vztahy mezi individuálními i skupinovým jednáním lidí a procesy probíhajícími v přírodě, přičemž teoretických přístupů je více – humaní ekologické, sociální ekologické, hlubinná ekologické a přístupy spojené s novými sociálními hnutími);
- komunitní studie;
- sociální změna a rozvoj.

Studenti fakulty absolvují (kromě zvolené specializace) „společný základ studia“, v němž ve čtyřech skupinách předmětů volí jistý počet tak, aby vyhověli požadavkům na skladbu studijního programu. V první a třetí skupině předmětů (jde o skupiny v pořadí: komunikace, přírodní vědy a matematika, sociální vědy a humanistické studie, ekonomika a obchod) se setkávají se sociologií. Mohou si vybrat z více kurzů. Seznámují se v nich s tématy z obecné sociologie, sociologické metodologie a z rurální sociologie. Základní kurz „Sociologie/Rurální sociologie“ vede více přednášejících, podle vlastních osnov. Opakují se v nich však následující témata:

- globální a rurální společnost (téma má charakter úvodu do sociologie)
- kultura obecně a rurální kultura
- proces socializace
- struktura společnosti (formální a neformální skupiny, vrstvy, třídy, sociální stratifikace)
- status, role, interakce: sociální život
- společenská nerovnost, moc a právo
- urbanizace, modernizace, byrokracie
- moderní společnost a její hlavní problémy (moc, vláda a stát, ekonomie a ekologie, sociální hnutí, rodina, náboženství, vzdělání)

- rurální společnost v moderním světě (globalizace agrárního sektoru, technologická změna v zemědělství, rodinné hospodářství, rurální komunity).

Tento základní kurz „Sociologie/Rurální sociologie“ vychází ze sociologických teorií, které jsou pak aplikovány na americkou společnost. K dalším kurzům přednášeným v rámci „společného základu studia“ patří „Populace a ekologie“, „Vůdcovství v dnešním světě“ a „Sociální procesy komunikace a difuze“.

V oboru rurální sociologie na UM-C je však také možné získat titul M.S. a Ph.D. (analogicky inženýr, příp. magistr a vědecká hodnost). V takovém případě je příprava velmi důkladná jak v sociologických teoriích, tak v metodologii a směřuje prakticky do oblasti veřejné politiky, zejména pro venkov a zemědělství. Při výuce v těchto vyšších stupních studia probíhá úzká spolupráce mezi katedrou rurální sociologie a katedrou sociologie, která je součástí Filozofické fakulty UM-C. Katedra rurální sociologie nabízí v magisterském a doktorandském studiu následující kurzy (hlavní):

- Sociální demografie
- Sociologie zemědělství
- Sociální změna a sociální trendy
- Sociální struktura lokálních komunit
- Životní prostředí a společnost
- Sociální statistika
- Sociální statistika pro pokročilé
- Populace a humánní ekologie
- Komunikace a šíření informací
- Výzkumná metodologie
- Techniky multivariační analýzy
- Kvalitativní metody
- Syntézy teorie a metody
- Organizace zemědělství
- Některé aspekty sociologie zemědělství a přírodních zdrojů
- Některé aspekty rurální sociologie – komunita
- Pozorování v terénu a použití výzkumných metod.

Výzkum v oblasti rurální sociologie

Tak jako v jiných disciplínách, je také v oblasti rurální sociologie organizována vědecká práce prostřednictvím zakládaných center (institutů), do kterých se podle dohody sdružují odborníci z různých kateder, příp. i fakult, aby vytvořili pružné týmy schopné interdisciplinárním způsobem řešit zamýšlené projekty. Je totiž ověřeno, že se takto snadněji získává grant, ať již ze státních nebo soukromých agentur. Centra (instituty) mají minimum stálých zaměstnanců a ti jsou zároveň pedagogy či výzkumnými pracovníky kateder. Tato „stabilní těla“ jsou pro řešení jednotlivých projektů doplňována studenty magisterského a doktorandského stupně studia, někdy i specialisty mimo UM-C.

Činnost center (institutů) je financována převážně ze získaných grantů, podpora UM-C je minimální. Granty nejenže znamenají mzdové prostředky pro studenty podílející se na řešení projektů, ale také prostředky pro materiální vybavení kateder UM-C.

Podrobná zpráva z cesty na UM-C, konané ve dnech 24. 8.–29. 9. 1995 je uložena na ČZU Praha. Informace o výuce i o výzkumu v oblasti rurální sociologie na UM-C jsou podrobněji než zde rozvedeny ve dvou článcích (Hudečková – Lošťák, Rikoon) uveřejněných ve sborníku z konference PEF ČZU „Agrární perspektivy IV“, konané v září 1995 na ČZU v Praze.

V roce 1996 bude spolupráce pokračovat. V březnu budou naši kolegové participovat na výuce rurální sociologie na ČZU. Probíhá stálá výměna odborné literatury a publikací, využitelná jak pro výuku, tak pro obohacení vlastní výzkumné činnosti. Jako v minulém roce, budou články našich kolegů uveřejňovány i v Zemědělské ekonomice.

Spolupráce již překročila původní rámec kateder garantujících výuku rurální sociologie. Děkan PEF ČZU nabídl možnost studentům UM-C zúčastnit se letní školy pořádané dosud na ČZU pro studenty z Ohio State University. Nabídka byla se zájmem přijata.

Mgr. Helena Hudečková, CSc., Katedra humanitních věd PEF, Česká zemědělská univerzita, Praha, Česká republika

XVIII. MEZINÁRODNÍ KONGRES HISTORICKÝCH VĚD

Mezinárodní historické kongresy, které jsou pořádány vždy v pětiletých intervalech, vytvořily již svou dobrou tradici. První kongres se konal v Paříži roku 1900, poslední XVII. kongres v roce 1990 v Madridu, současný XVIII., v kanadském Montrealu, příští bude v jubilejním roce 2000 v Oslo.

Pořadatelem mezinárodních historických kongresů je Mezinárodní výbor historických věd se sídlem v Lausanne. Vlastní přípravou a organizací se zabývali tentokrát kanadští historikové, členové kanadských univerzit ve spolupráci s Kanadskou historickou společností. Místem konání XVIII. Mezinárodního historického kongresu byl kongresový palác v Montrealu.

Kongresu se zúčastnilo 1 713 historiků ze všech kontinentů. Nejpočetněji byly zastoupeny Kanada, USA a Japonsko, velmi dobrá byla účast z evropských zemí. Z České republiky přijelo na kongres deset historiků. Jednací řečí kongresu byla angličtina a francouzština.

Program kongresu byl opravdu všestranný. Byla stanovena tři velká celodenní témata: 1) Národnosti, národy a státy; 2) Muži, ženy a historické proměny v jejich vztazích; 3) Diaspory – počátky, formy a význam (Řekové, Židé, Irové, Arméni atd.). Zahájení kongresu, velká témata a závěrečné zasedání byly dabovány.

Kromě velkých témat probíhalo průběžně 16 sekcí se specializovanými tématy a 36 kulatých stolů. Výtahy z hlavních referátů byly uveřejněny ve sborníku *Actes/Proceedings*, který obdržel každý účastník kongresu.

V nepřeberném množství kongresových témat převládala problematika 19. a 20. století. Uvedu zde alespoň některá témata, která jsou rovněž předmětem so-

ciologického studia: Stáří a stárnutí (sekce 8), Dějství v historii – od středověku do současnosti (sekce 9), Historie životního prostředí – aktuální ekologické téma (sekce 14).

Z kulatých stolů bych chtěla upozornit na některá pro nás aktuální témata: Stát, společnost a nemoc, politikové a veřejné zdraví (9); Úloha emigrantů při tvorbě nebo obnovení států ve střední a východní Evropě 20. století (14); Konec současných totalitních režimů v jižní a východní Evropě a Latinské Americe (15) – témata 14 a 15 se týkají i bývalého Československa.

Obdobný charakter měl i kulatý stůl č. 23: Systém transformací venkovských společností střední a východní Evropy před a po roce 1989. Podkladem k jednání byl mezinárodní srovnávací sociologicko-historický výzkum postkomunistických zemí, který koordinuje tokijský profesor Shingo Minamizuka. Do tohoto výzkumu byla zahrnuta Bulharsko, Česká republika, Maďarsko, Polsko a Rumunsko. V rámci výzkumu byly vypracovány sociologicko-historické monografie těchto vybraných zemí. Konečné vyhodnocení srovnávacího výzkumu bude provedeno v Japonsku.

Druhým výstupem byly referáty pro Montreal. Profesor Minamizuka přednesl na kongresu hlavní referát, v němž vyložil svou koncepci srovnávacího vývoje venkova v oblasti politické, ekonomické, sociální a kulturní. Na něj pak navázali referáty historiků jednotlivých zkoumaných zemí, kteří podali syntézu vývoje společenských proměn venkova ve své zemi. K nim se připojili tři další historikové z USA a jeden Angličan. Ze všech přihlášených příspěvků byl současně vydán sborník.

PhDr. Ing. Jaroslava Honcová, CSc., Praha, Česká republika

VÝVOJ ČESKÉHO VENKOVA V PRŮBĚHU STOLETÍ¹

Již přes tisíc let je český stát nedílnou součástí a spoluvůrcem evropské kultury a civilizace, i když pod různými názvy: nejprve České knížectví, později České království, od roku 1526 začleněné do rakousko-uherského soustátí pod vládou habsburské dynastie. Po rozpadu Rakousko-Uherska vznikla v roce 1918 připojením Slovenska od Uherského království Československá republika. Na ni navazuje Česká republika (od roku 1993).

Charakteristickou vlastností českého venkova, která hrála velkou úlohu v celém historickém vývoji, byla velká hustota osídlení, při čemž sdílností jednotkou byly vesnice a poddanská městečka.

V 16. a 17. století probíhal proces koncentrace feudální pozemkové držby a vytváření velkých panství. Panství byla nejnižší jednotkou politické správy a soudnictví i jednotkou ekonomickou.

Při tom měli poddaní i orgány vlastní samosprávy, i když byly jmenovány vrchností – poddanská městečka měla městské rady v čele s purkmistrem, vesnice rychtáře. Tento stav trval až do zániku feudalismu v roce 1848.

Rustikální zemědělská půda v katastru byla rozdělena mezi určitý počet rolnických rodin. V polovině 18. století vznikla z populačních přebytků na českých vesnicích nová sociální vrstva domkářů-bezzemků, kteří si stavěli domky nejčastěji na obecním pozemcích. Jejich obživou nebyla půda, ale řemeslo nebo nádenická práce. I když část bezzemků odcházela do měst pracovat do průmyslu, jejich počet na vsích neustále vzrůstal a ve čtyřicátých letech 19. století již měli na vesnicích početná převaha.

České země měly nejrozvinutější průmysl v Rakousko-Uhersku. Rozvoj železniční dopravy umožnil stále většímu počtu průmyslových dělníků bydlet na vsi a dojíždět do zaměstnání. A tak existoval na českých vsích dvojitý lid: rolníci a domkáři. Tato sociální struktura sehrála později při kolektivizaci významnou úlohu.

Rolníci byli konzervativní politicky i nábožensky. Když po první světové válce propuklo hnutí Pryč od Říma, zůstali rolníci převážně katolíky. Politicky byli orientováni na pravice politické strany, zejména pak na stranu agrární, která reprezentovala jejich stavovské zájmy. Agrární strana si dovedla účelně prováděnou pozemkovou reformou, která omezila rozsah velkostatků zejména ve prospěch drobných rolníků a bezzemků, získat i část domkářů.

Jinak byli domkáři politicky orientováni spíše levicově, zejména pro sociální demokracii, v menší míře pro KSČ. Byli mezi nimi též příslušníci evangelických církví, ba i někteří bezvěrci.

Po roce 1848 byly obce spravovány volenými obecními radami a zastupitelstvy. Jejich nadřízenými orgány byly okresní úřady.

Velký význam mělo rozvinuté zemědělské družstevnictví, které mělo své počátky již v 90. letech 19. století. Byla to zemědělská družstva úvěrní, nákupní a prodejní, zpracovatelská – např. družstevní mlékárny nebo družstevní lihovary, družstva strojní nebo elektrárnská. Družstva poskytovala rolníkům levný úvěr, chránila je před konkurencí a před závislostí na velkých sedláčích.

Vysokou úroveň českého zemědělství podporovalo i rozvinuté zemědělské školství – střední s maturitou a nižší jednoroční. Existovaly školy hospodářské pro muže a hospodyňské pro ženy, neboť ženy hospodyně obstarávaly na statku živočišnou výrobu.

Absolventi vysokých škol zemědělských v Praze a v Brně se uplatňovali na velkostatkách a velkých statcích.

Ze spolkové činnosti nutno uvést a zdůraznit sokolské hnutí, které mělo charakter celonárodní. Jeho cílem bylo vychovat zdatný a hrdý národ. Kromě pravidelného cvičení pořádal Sokol vždy jednou za šest let celostátní tělocvičné slavnosti v Praze – sokolské slety, které získaly světovou proslulost.

Praktický význam měly pro obce místní hasičské sbory, jejichž úkolem byla preventivní ochrana proti požárům.

Tvůrčí kulturní činnost provozovali ochotníci – členové místních divadelních amatérských souborů.

Všechny tyto aktivity směřovaly obec. Členy těchto spolků byli místní občané bez ohledu na politickou a sociální příslušnost.

Velké společenské proměny nastaly po druhé světové válce. K levicové společenské orientaci obyvatelstva přispělo osvobození Československa sovětskou armádou. Komunisté již v roce 1945 získali převahu na obecních úřadech – národních výborech a volby v roce 1946 tuto převahu potvrdily. Agrární strana nebyla již v tomto období povolena. Odsun Němců umožnil bezzemkům kolonizovat pohraničí a získat tam opuštěné selské statky.

Zásadní zlom znamenal převrat v roce 1948, který nastolil vládu jediné politické strany – komunistů. Ještě v roce 1948 byly konfiskovány statky nad 50 ha. A záhy poté v roce 1949 započala kolektivizace zemědělství a vytváření jednotných zemědělských družstev (JZD). KSČ uváděla tři předpoklady vzniku JZD: politickou převahu KSČ, diferencovanou sociální strukturu v obcích s početnou převahou domkářů a družstevní tradice strojních družstev.

Vedoucí úlohu sehrála vesnická organizace KSČ, která diktovala vůli nadřízených stranických orgánů

¹ Příspěvek přednesený na XVIII. mezinárodním kongresu historických věd, který se konal od 27. 8. do 3. 9. 1995 v Montrealu, Kanada

svým členům z řad domkářů i rolníků. Nově založená JZD konfiskovala půdu obecní, církevní a bývalých dvorů včetně hospodářských budov.

Z počátku obvykle převažovala tato nečlenská půda. Členskou základnu získávali postupným nábohem. Každý člen vkládal do JZD půdu, hospodářská zvířata i zemědělské stroje. Četní rolníci byli označeni za kulaky a nesměli být přijímáni do JZD. Jejich půda, inventář a hospodářské budovy byly konfiskovány pro JZD. Oni sami buď zůstali v obci a pracovali jako pomocní dělníci v průmyslu, nebo byli i s rodinami vyvezeni s minimálním majetkem mimo okres se zákazem návratu. To záleželo na funkcionářích KSČ.

Rolnický stav přestal existovat. Jeho základem byla po staletí rolnická rodina – hospodář, hospodyně a předurčený dědic – syn, případně dcera. Některé selské rody žily na svých statcích i 200–300 let. To vše bylo rozbito. I rolníci, přijatí do JZD, nyní vykonávali jen dílčí operace a odvykli si samostatně hospodařit. Jejich děti odcházely houfně do nezemědělských povolání. Věková struktura JZD postupně stárla. Do JZD vstupovali noví členové bez vazby k půdě a někdy i k obci.

Změnil se i život v obcích. KSČ zcela ovládla místní národní výbory. Místní řemeslníci a obchodníci byli znárodněni. Komunisté řídili i činnost místních spolků, pokud nebyly zrušeny. V souvislosti s kolektivizací zaniklo i vyspělé české zemědělské družstevnictví. Ze Sokola zbyl pouze název pro sjednocenou tělovýchovu a sport.

Komunisté spatřovali velkého nepřítele v křesťanských církvích pro jejich světový názor, organizovanost a vliv na věřící občany. Proto proti nim zahájili soustavný ideologický boj. Kněží byli postaveni pod státní dozor, vyučování náboženství odstraněno ze škol, na všech probíhaly i kontroly návštěvy občanů při bohoslužbách.

V šedesátých letech bylo započato s postupnou kvalitativní přestavbou venkovského osídlení při zachování struktury osídlení. Byly vytypovány tzv. střediskové obce, do kterých byly soustřeďovány ekonomické a společenské aktivity. Docházelo i ke slučování několika obcí se společným místním národním výborem.

Malé obce s nedostatkem pracovních příležitostí se rychle vytlidňovaly. Prázdné vesnické domy byly využívány k rekreaci městského obyvatelstva.

Paralelně se slučováním obcí probíhalo i slučování JZD a to v několika etapách. Slučování započalo v roce 1960, ihned po ukončení kolektivizace. Koncem roku 1959 bylo v Československu 12 060 JZD s průměrnou výměrou 381 ha, koncem roku 1970 klesl jejich počet přibližně na polovinu. V sedmdesátých letech se tempo slučování zrychlilo, takže koncem roku 1976 existovalo 1 959 JZD o průměrné výměře 2 064 ha, v dalších letech již bylo tempo slučování mírnější a sloučená JZD se stabilizovala. V roce 1988 bylo již jen 1 657 JZD s průměrnou výměrou 2 598 ha.

JZD se slučovala v několika etapách. Vznikla početná JZD o výměře nad 3 000 ha. V takovém rozsáhlém teritoriu bylo sloučeno i 10 původních JZD.

Cílem slučování JZD měla být efektivní intenzifikace zemědělské výroby, při čemž se zdůrazňovalo správné rozmístění zemědělské výroby, účelová specializace zemědělských podniků a možnost využívání mechanizačních prostředků. JZD se stala podniky průmyslového charakteru.

Původní členové z řad zemědělců často pracovali mimo svou obec a museli dojíždět do práce. Přitom neměli již žádný vliv na řízení JZD.

V tomto stavu zastihl českou vesnici listopadový převrat roku 1989.

Od té doby došlo na českém venkově k pronikavým změnám. Po vydání restitučního zákona z roku 1991 se přihlásilo o svůj majetek mnoho původních rolníků a jejich dědiců, ale jen málokterí jsou schopni hospodařit. Chybí zde základní předpoklad – zemědělská rodina. Mnozí restitučníci jsou již v důchodovém věku. Neobnovila se ani původní zemědělská družstva, která poskytovala rolníkům levný úvěr a kvalitní služby.

Bývalá JZD se transformovala v zemědělská družstva vlastníků, v menší míře v obchodní společnosti. Jejich výměra se podstatně zmenšila rozpadnutím četných sloučených JZD. Skupina od 2 500 ha se snížila z 49 % na 31 %. Velikost většiny družstev odpovídá výměře zemědělské půdy v katastru obce. Zemědělská družstva využívají společné budovy, strojní park, odborné pracovní síly. Většina restitučních svěřuje svou půdu do pronájmu zemědělským družstvům nebo soukromě hospodářcím rolníkům. Hospodaření na pronajaté půdě se stalo převažující formou. Současně probíhá i privatizace a restituce státních statků.

Obce se vrátily k původní demokratické správě, přičemž se četné sloučené obce opět rozdělily. Některé spolky s celostátní působností obnovily svou činnost, např. Sokol, Orel, Skaut.

Tricetiletá absence náboženské výuky se projevila poklesem religiozity. Na českém venkově se však rozvíjí i nezemědělské podnikání, zejména ve sféře služeb. Podnikatelé náleží převážně k mladší a střední generaci a jsou mezi nimi i bývalí komunističtí funkcionáři a jejich potomci.

Jak je vidět, nejde na vesnici o pouhou obnovu poměrů před rokem 1948. Naopak vytvářejí se zcela nové politické struktury a jejich další vývoj zůstává otevřenou otázkou.

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