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**Local Practices of Rural Policy:
Interrelationships between Social Effects of the Rural Development
Programme and Economic and Environmental Effects**

The social aspects of EU's coming Rural Development Programme 2007-2013 (RDP) and how these may be related to economic and environmental aspects are focal in this paper. In it we present the outline of a research application for a longitudinal study of the implementation of the RDP. The research programme proposed has been developed by a group of Swedish researchers with backgrounds in rural development, human geography, economy, anthropology and learning theory. We are currently applying for funding for the programme. By presenting it at the ESRS conference we hope both to get feedback on our approach, and contribute to the establishment of a network for programmes in which similar issues are explored.

Background

The purpose of the suggested research programme is to contribute to the understanding of the implementation processes of the RDP and the effects of rural policies in local rural communities; to explore relationships between the social aspects of rural development and economic and environmental aspects; and to contribute to the discussion and development of especially the social indicators for policy interventions and evaluations. The focus will mainly be on axes one, three and four in the RDP. This is because, in Sweden, axis two will mainly consist of a continuation of the previous support system for environmental arrangements in agriculture¹.

Today there is no research in Sweden on the implementation processes and effects of rural policies in rural areas. At the same time, evaluations have been produced in all rural programmes carried out during the last ten-year period or more. Therefore, much knowledge exists about individual programmes, but this has not yet been related to other local processes influencing development. Furthermore, consequences of policy interventions that do not fall within the objectives of the development programmes, i.e. the interrelationships between the programmes

¹ The research programme may well be extended to include questions on the environmental aspects of rural policies. How well indicators promoting an environmentally sustainable development reflect and support the biological and ecological processes sought by policies also need to be explored. At present however the programme does not include such competences.

and local processes, are rarely or never explored in the evaluations. The explanatory value of the evaluations is therefore limited.

However, according to the evaluations made, regional development policies and programmes for the development of rural areas have had a limited ability to support regional as well as rural development. The majority of evaluations indicate weak or no effects (see, for example, Metoderledaren 2001, Glesbygdsverket 2001, ITPS 2004, Glesbygdsverket 2005, Riksrevisionen 2005). At the same time, other studies show that local actors and local contexts have been positively influenced by political programmes. Local actors have been able to use programme resources to develop enterprises, organisations etc. that have survived the end of programme funding and contributed to long term local development (Larsson 2002, Waldenström 2004). This raises questions about what the evaluations measure, but it also points to a gap between knowledge about local processes on the one hand and the content of the policies on the other. This is also suggested in studies and evaluations that emphasise the Leader model as a strategic method for building local development capacity (ESPON 2004, Austrian Institute for Regional Studies and Spatial Planning [ÖIR] 2004, Aradóttir 2005). The Leader model is recommended because of its potential to further favourable local preconditions for development. The importance of the Leader model in the forthcoming RDP also indicates increased attention to the local context in development. By integrating the Leader method, territorial and increasingly local approaches are sought to strengthen local contexts.

There is, however, a lack of longitudinal research projects that study interrelationships between local processes, political programmes and development (see, however, Carlsson 1993, Forsberg et al. 2001). Research into these interrelationships is needed in order to interpret results of evaluations and to formulate and adjust indicators for evaluation and monitoring. Empirical studies on social capital point to a fundamental problem when formulating indicators to evaluate effects and guide the implementation of political programmes (Portes 1998). When indicators which operationalise processes favourable for development in empirical studies are used as policy objectives, and consequently also in evaluations, the underlying circumstances of greater importance for the production of the intended processes may well be neglected.

Evaluations can be divided into three main categories (Karlsson 1999). The first category is *objective-result evaluation*, based on a controlling perspective. These evaluations aim to control whether the objectives have been met. The evaluations referred to above can, to a greater or lesser extent, be put into this category. The second category is *process evaluation*, based on a development perspective. Here it is mainly the implementation that is evaluated, often through following the process over time. This opens for the possibility for evaluators to inform the implementation process and contribute to process adjustments and changes. The third category is *interactive evaluation*, in which the participation of involved and affected stakeholders is central. In this approach the key aim is to understand and explain the outcomes drawing on a multitude of perspectives, representing those concerned and affected by the process evaluated. This opens for learning processes among the involved stakeholders. In the research project, we intend to combine a *processes and development* perspective with an *interactive and learning* perspective when

exploring the implementation and effects of the RDP. By so doing, we will obtain a deeper understanding of the interrelationships than the linear and causal relationships that often guide evaluations using the objective-result model.

The RDP shall contribute to an economically, environmentally and socially sustainable development. One of the difficulties with rural policies and their implementation is that it is assumed that these three aspects are interrelated. That might be the case at the programme level, but it is rarely possible to fulfil in projects. The social sustainability related to the economic and environmental sustainability is probably the most difficult aspect to capture. This is due, among other things, to the neglect of social aspects in rural development policy and research and the ensuing weak indicators. It is therefore imperative to study and evaluate the social effects of the policies. At the same time, these are elusive phenomena that can be best understood by means of longitudinal and local studies. Our starting point is therefore in the social aspects of sustainability and economic and environmental aspects are explored in relation to the social aspects.

A common research approach on interrelationships between social and economic aspects of development is to study the multifaceted roles of local industry, and their importance in local communities (Bergqvist 2004, Taylor et al. 2004). In the 1990s, the term “the X factor” was coined to render visible the fact that entrepreneurship is dependent on local social conditions. Since then much research points to the social dimension being crucial for local growth (Mascanzoni & Novotny 2000, von Bergman-Winberg 2003, Berggren & Brulin 2004). Research into entrepreneurship shows, for example, the importance of the interaction between entrepreneurs and the local community, where the entrepreneurial story is continually reformulated, interpreted and told (Hjort & Johannisson 2003). It is also indicated that it is at local level and not ‘at a distance’ that people have to attempt to understand and negotiate the possibilities development programmes offer. Such research has given content to the “X factor”, but there still is a lack of studies investigating the interrelationships. Research is needed that goes further than establishing the fact that ‘an important key to potential growth lies in the total concept of business climate, working environment, living conditions and quality of life’ (von Bergman-Winberg 2003:85).

The interrelationship between local social and societal conditions and environmental sustainability is also a research field attracting increasing interest. This may, for example, concern the use and management of natural resources (Ostrom 2000, Sandström & Tivell 2005), the multi-functionality of agriculture and the role of farmers in the local rural community. It may also be about what the landscape, and changes to it, means for local actors. Demographic changes and changes in production patterns lead both to changes in the landscape, and to changes in how the landscape and its resources are perceived and interpreted. This may result in conflicts (Hallgren 2003). Local actors participating in various forms of joint management can be one way of achieving socially and environmentally sustainable use of natural resources and of the landscape (Zachrisson 2004). Various kinds of communicative planning tools are other ways of creating dialogue about the design of and changes to the landscape (see for instance Reiter 2004).

Our focus on these processes will be on the local social effects of policy driven procedures for and changes in natural resource use.

Research questions and design

To summarize, the research programme focuses the interrelationships between local processes, political programming and local development over time. The approach will be explorative and theory generating, focusing on how the RDP is implemented at local level. The research objective is to explore *the encounter between the RDP and local practices in rural areas and what consequences this causes*. Focussing research questions are:

- **In what ways are local processes and local practices formed by the RDP, and vice versa; in what ways is the RDP transformed by local practices?**
- **How does the implementation of the RDP at local level affect the prerequisites for the sustainable local development of rural areas?**
- **In what ways can policy indicators and evaluations be developed so that they better capture the effects of the policy interventions on local practices and thereby better contribute to promote rural development?**

The research design builds on comparative studies in four municipalities in different counties, and on selecting a locality in each municipality for more in-depth studies. In studying the implementation of the RDP in the municipality and in the locality, we will follow partnerships, projects and other development initiatives connected to the RDP. We will also study how the programme has been organised at different levels and the consequences of this in the local context. By carrying out the comparative studies in four municipalities and selecting a locality in each municipality for more in-depth studies, we will be able to examine both sectorial and territorial consequences of RDP policies. This approach will also enable us to analyse the reliability and validity of the indicators used to evaluate and manage sub-programmes within the RDP. We will thereby be able to critically discuss the outcomes of these indicators.

The planned research programme will be interdisciplinary, based on the disciplinary competence and co-operation of the researchers involved. Together, the research team has training and experience of research within Anthropology, Agronomy, Business Economics, Organisational Theory, Gender, Human Geography, Political Science, Planning, Rural Sociology and Pedagogy. The research programme will draw on several different research methods. It will include quantitative studies, e.g. questionnaire studies to monitor and analyse changes in attitudes in certain groups of grant recipients or changes in local companies' business direction. The programme will also include in-depth local studies of a qualitative character and case studies. An evaluative approach implies that we will provide feedback of research results to different actors and also use e.g. focus groups that reflect on the results.

Basic knowledge about the four municipalities will be needed. Starting the first year, every year of this research programme will include the production of on-site field reports. Based on municipal statistical data, other relevant data and analyses, interviews, focus groups etc. the field reports will provide a frame of reference needed to interpret data collected in more topical studies.

The longitudinal studies in the municipalities will be organised so that two researchers share the main responsibility for studies in one municipality. Thematic studies and sectorially-oriented studies may apply to one or all municipalities. What is common to all studies is that they will study the interrelationships between local processes, policy implementation and development. All studies will also focus on four themes which are presented in the following section.

Concepts and theoretical perspectives

Our starting point for the study is thus the social aspects of development and, on the basis of these, we will also study economic and environmental aspects. To do that four themes will be dealt with consistently in all studies. These themes are developed theoretically below and follow the aspects of sustainable development included in the national strategy for sustainable development (Government Report 2001/02:172). The four themes are:

- participation and power;
- cooperation and networking;
- gender;
- learning.

Through these four themes, we will study how the forthcoming RDP is implemented in local contexts, i.e. if and how different local practices are created, established and/or changed. However, before elaborating these themes, two concepts central to our study, *local communities* and *local practices* will be introduced briefly.

Local communities and local practices

The official local level in national and EU-based policies is the municipality and our research programme will be geographically based in four municipalities. There is, however, a sub-municipal level – the ‘*local community*’ – which plays a key role in the research approach. In our work the term should be understood as ‘the perceptions of and manifestations of community between people in a place over time’ (Gunnarsdotter 2005:29). It is not enough for the inhabitants in a particular locality to have a common history for a local community in the sense we use the term to come into existence and be maintained. It is at this *local* social level that people’s lives unfold, the majority of everyday decisions are made and socialisation for adult life takes place. This flexible level has been defined by Cohen (1985:15) as ‘bigger than a family relationship but smaller than the abstraction we call a community’.

Recurring and regular individual or collective ways of acting can be described as practices. When actions are aggregated and including more than one person, we can speak of '*local practices*' (Stenbacka 2001, Israel 1999). Åquist (1995) summarises the term practice, using the words, 'the tangible everyday reality within which we live and act, the experiences we make and the manner in which we relate to the world'. By using the term practices, it is possible to take patterns of behaviour from the individual to a society level, e.g. to local communities, without contact with the individuals being lost (Stenbacka 2001). This approach also makes it possible for an individual to be assigned to several practices, which is more productive since it is often impossible to assign an individual to one category. This is due to individuals moving between different categories/groups/practices when the context changes and when their own role is changed/adjusted. One of the possible influences for such changes being the RDP.

Participation and power

The formal responsibility for the implementation of the RDP in Sweden will be at the county administrative boards. They will be given some discretion to design the implementation of the new programme. Rural policy will therefore be more regionalized and possibly obtain a more distinct position in regional development plans. At the same time, the Leader method will also have a greater scope than in the earlier Swedish programmes. This means that regional and local partnerships can become more important for the implementation of the RDP than previously.

The use of partnerships is part of administrative changes within the public sector. These changes may be seen in terms of '*new governance*' (see, for example, Eckerberg and Joas 2004) and the changes in the role of the state during the last decades. Power is delegated vertically, upwards through international agreements and downwards through regional, municipal and local levels being given greater influence. At the same time, the delegation of power is taking place horizontally to non-public actors through private and civic actors being part of partnerships, through the privatisation of previously public businesses or through non-profit organisations being responsible for the administration or implementation of various tasks. These changes pose questions about the democratic basis of the policies, about the local and regional legitimacy and responsibility of the partnerships and about the effectiveness of the policies pursued (Larsson 2002, Lundkvist 2004, Lindström 2005).

The interrelationships between social and economic aspects of development are often termed as '*social capital*'. This refers to a culture of cooperation and trust that favours democratic processes, which can lead to economic growth (Coleman 1990, Putnam 1993). Other researchers give the term a broader meaning and also speak of social capital in connection with social, economic and 'communal' well-being (Falk & Kilpatrick 2000). Uslaner (1999) believes that it is important to differentiate between different types of trust – as it is often assumed that the positive side of trust is present in social capital. General trust means the ability to have confidence in people who have values and norms that are different from one's own, while the more selective or specific trust is limited to include those who resemble the individual or the group. It is, Uslaner claims, actually only general trust that can build social capital. In a similar discussion, Putnam

speaks of 'bonding' and 'bridging' with regard to social capital (Putnam 2000), which can partly be seen as a matter of strengthening internal relationships and external networks.

Social capital is, however, a disputed concept difficult to operationalise in empirical studies (Svendsen & Svendsen 2000, Westlund 2003). In the European research project RESTRIM, for example, the term *network* was used to make operationalising possible (see, for example, Tillberg Mattson & Stenbacka 2004, Lehto & Oksa 2000, Arnáson & Shucksmith [eds.] 2004). But social networks do not only involve participation, but also exclusion (see, for example, Mohan & Mohan 2002). 'Negative social capital' consists, for instance, of the exclusion of 'outsiders' (Portes 1998). Questions about power and participation at different levels is thus topical.

Cooperation and networking

Another manner of operationalising social capital is through studying the cooperation between actors and processes for organising where different actors coordinate their activities. Sustainable development, like rural and regional development, requires cooperation and coordination between policy areas, between actors from different sectors and administrative levels. In the new RDP, agricultural and rural policies shall function together to a greater extent than previously. In each policy area, policy formation is based on governance. Contents and working methods are not formulated primarily in accordance with established political sectors, but rather in accordance with the issues that need to be resolved and these issues vary over time (see, for example, Stoker 1998).

In practice, the EU's various structural fund programmes have come to emphasise partnership as a way of working at different levels (see Section A above). When policy is changed, questions always arise about participation and power: Who are included? Who are not taking part? How are legitimacy and the ability to act created? How is liability in the event of failure enforced? This aspect, which particularly focuses on political cooperation in the RDP, forms one of the components in this theme.

A second component of cooperation and networking concerns how results are achieved within the RDP. Economic-geographical theories often stress proximity and cooperation as critical factors for growth and development (Hallin & Lundquist 1999). This is reflected in the territorial approach that is found in the Leader programmes in particular. By using (new) local resources of all kinds in such a manner that they benefit the district or region, development-oriented co-operation shall contribute to development and growth (Glesbygdsverket 2000). But we need to ask the critical questions here: is cooperation (in partnership or in other ways) as critical for development as theories and policy assert? What type of effects does it lead to and where and what are the limits for its possibilities?

Thirdly, cooperation and networks are based on actors participating or being involved in networks contributing on somewhat similar terms or in such a way that trust is developed between the actors (Stone 1989). To the extent that the networks meet a real need and are able to contribute towards an increased ability to act, they are important for development. But often

this development of trust is based on the networks not being renewed too quickly. Time is needed to make them to function well (Larsson 2002). This tenacity in the transformation of networks is, at the same time, an obstacle to new approaches and often contributes to maintaining power constellations that already exist. In relation to the RDP, it is particularly interesting to follow the consequences of agricultural and rural policies converging. What consequences will this have for various practices that exist locally? Do the networks act as an obstacle to or as an enabler of development? Are there groups consistently missing in networks? If that is the case – then why?

Gender

Gender relationships is a crucial concept when understanding and explaining individual and collective patterns of behaviour, scope for action, local industry and the participation of men and women in local development. Gender studies have become increasingly common in European research on rural areas. A early, vital piece of work was that of Davidoff et al. (1976) in which rural societies in the Western world were understood as placed under a dominant ideology, where men were leaders in the ‘natural hierarchy’ while women were responsible for the household and maintaining relationships within the family and the local community. Rural areas are still signified with masculine symbols, particularly within agriculture and forestry (Arora Jonsson 2005).

When critical examination began, the term ‘*local community*’ acquired new significance. Since then, this term is often considered as the expression of a romantic picture of rural areas representing the traditional roles of the sexes. From more descriptive studies on the roles of men and women, research has moved towards a critical view – in terms of equality and inequality – and later also towards post-structural and post-modern theoretical input focussing the social construction of gender. Research fields of special interest are local communities, work, the environment and sexuality (see the research overview by Little & Panelli 2003).

Men and women are a part – consciously or unconsciously – of the local relationships that create patterns of practices. They encounter opportunities and restrictions in local contexts and at the same time they are involved in forming them. Research has, for example, identified a gap between female networks and local politics. Possibly the RDP can contribute in this respect towards new constellations. As this study aims to develop in-depth knowledge of and about four local communities, it will become possible to see whether and how the different contexts create different local gender practices in relation to political programming. There may, for example, be districts that are more ‘open’ and permitting, while others may be more ‘closed’ or restricting. Another possibility is, of course, that such distinctions do not have anything whatsoever to do with the geographical demarcation of the district – and the distinctions occur instead within different contexts within a district. Most likely there are local variations, and one and the same man or woman may also have several different roles in different contexts.

Diversification and variation have also become key concepts within rural research, which is demonstrated in our use of language as we speak of different rural areas and the diversity of

femininities and masculinities (see, for example, Forsberg & Gunnerud Berg 2003). Social and cultural aspects have also come to have a crucial significance in analyses of rural areas (physically and socially), rurality (also including the social construction of rural areas) and gender relationships.

Learning

During the last decades, the terms '*learning*' and also '*knowledge*' have acquired an increasingly greater interest within both the social sciences and policy. Knowledge and learning are assumed to explain complex social changes (Bron & Schemmann 2003). Creating supportive contexts for learning processes is therefore recommended in the formulation of policies for both regional and economic development (see, for example, Maskell 2001). It is assumed that learning that supports regional and local development is generated through networking, mobility, cross-sectoral partnerships and education. Access to tools and arenas for joint reflection and learning, such as partnerships, are often seen as key elements in dealing with conflicts and creating synergies supporting development. However, how learning processes can be supported is rarely described and the link to theories about adult learning is often weak (Waldenström 2005).

When studying learning processes, it is useful to take local practices as a starting point, linking them with theories of learning based on action theory (Aronsson and Berglind 1999, Döös and Wilhelmsson 2005, Hagström & Hansson 2003). Action theory has been developed in the context of work place learning and may contribute to the understanding of why learning processes arise under certain conditions in networking, partnerships and cooperation but not under others. Opportunities for action as well as for reflection are crucial for both individual and collective learning (Kolb 1984, Dixon 1994). In action theory subjective and objective scope for action and internal and external scope for reflection are key concepts which allow for the elucidation of the preconditions for learning and development in activities. How people interpret their opportunities for action, what they perceive to be controlling as well as the more objective contextual conditions within particular activities and action contexts are focal. When the individual moves between different action contexts, learning can take place both through their participation in the particular contexts, but also through their paying attention to contrasts between different contexts (Dreier 2000). Moving through different contexts the capacity to handle them and act adequately in them may be a strategic competence. But neither success nor learning is to be taken for granted or simple. The individual actor can influence the contexts but is, at the same time, influenced by them. Contexts are of a structuring nature (Hay 2002), something that has consequences for both individual and collective learning processes. Also this theme is thereby connected to questions of power and participation.

Research Team

The research programme will be implemented by a research team of eight people, one of who will also act as programme leader.

Programme leader

Cecilia Waldenström or Yvonne Gunnarsdotter or Kjell Hansen (details below).

Research team

Richard Ferguson, PhD in Business Economics, Department of Economics, Swedish University of Agricultural Sciences

Yvonne Gunnarsdotter, PhD in Environmental Communication/Rural Development, Department of Urban and Rural Development, Swedish University of Agricultural Sciences

Kjell Hansen, Ass Professor in Ethnology, Department of Urban and Rural Development, Swedish University of Agricultural Sciences

Seema Arora Jonsson, PhD in Rural Development, Department of Urban and Rural Development, Swedish University of Agricultural Sciences

Lars Larsson, PhD in Human Geography, Högskolan Dalarna, Borlänge

Thomas Norrby, Licentiate in Agriculture (Business Economics), Department of Urban and Rural Development, Swedish University of Agricultural Sciences

Susanne Stenbacka, PhD in Human Geography, Department of Social and Economic Geography, Uppsala University

Cecilia Waldenström, PhD in Pedagogics, Agronomist, Department of Urban and Rural Development, Swedish University of Agricultural Sciences

Scientific Committee

A Scientific Committee will be set up, consisting of five researchers from different disciplines with relevance to our research programme. The research team and Scientific Committee will meet at least once a year during the programme.

Reidar Almås, Professor in Rural Sociology, The Norwegian Centre for Rural Research, Trondheim, Norway

Gunnel Forsberg, Professor in Human Geography, Stockholm University

Daniel Hjort, Professor in Business Economics, Copenhagen Business School, Denmark

Katarina Saltzman, Research Fellow in Ethnology, Gothenburg University

Erik Westholm, Professor in Human Geography, Dalarna University College

Work plan

Plan for activities Year 1-3

Guidelines for the research programme will be developed in two programme plans, one at the start of the programme and a second halfway through. The plans will be reviewed each year when reporting to the Steering Committee. These plans will be somewhat repetitive in its general organisation and chronological order. Research issues will dominate the earlier stages of each phase. Studies on evaluations and indicators will be more prominent at the latter stages.

Presumably, early empirical studies will be more general whereas latter studies will build on them and deepen the understanding of more focussed research issues.

Bearing these general trends in mind, the section below describes activities to be undertaken during the first three years of the research programme. During the fourth year our programme will be evaluated and a second programme plan will be developed.

YEAR 1

The first *programme plan* is developed in co-operation with actors at the county level, the Swedish Board of Agriculture and the Scientific Committee. Report to the Steering Committee.

The research programme will start with *literature reviews*. One is based on previous evaluations on rural development programmes, i.e. not only predecessors to the present RDP. Other literature reviews will deepen the understanding in the research team on each of the themes, thereby introducing the shared learning that will be an integral part during the seven year programme. These reviews will also help to establish a common understanding on concepts guiding our programme, as well as identifying research questions and sub-projects within the programme. Further, these reviews are early outputs from the research programme.

During the first year the *field reports* will be introduced. As mentioned above they are crucial for contextualising our findings during the research programme.

The establishment of a research programme *website* for internal communication and information sharing, as well as for external users to take part of progress in the programme.

Annual *meeting* being held with the Scientific Committee, Steering Committee, and workshops within the research team.

YEAR 2

A second *field report*, developed from findings from the previous year. The field reports build on the knowledge gathered in all studies performed within the research programme. Their format and content will therefore evolve and vary over time.

In establishing initial values for mainly the evaluative parts of the programme a *questionnaire study* is done in the four municipalities. Follow-up questionnaires are planned for capturing changes systematically, possibly with an interval of every two years.

Longitudinal and thematic studies will begin

Annual *meeting* being held with the Scientific Committee, Steering Committee, and workshops within the research team.

YEAR 3

A third *field report*, developed from findings from the previous years.

Longitudinal and thematic studies continue.

Studies and analysis on *evaluation and indicators* are progressed to inform mid-term evaluations of the RDP. These are based data gathered so far in the research programme. The indicators that apply to the social sustainability will be given special priority.

Arrangement of annual *meetings* with the Scientific Committee, Steering Committee, and workshops within the research team.

Ongoing activities

Each year, a *report* will be presented to the Steering Committee and the Scientific Committee. The aim is to keep the committees informed, to discuss contents of the research programme and planned activities for the year to follow. The research team will also perform and present reflective evaluation which will also be a part of the committee meetings.

During the course of the programme, *seminars* will be arranged for discussion and feedback of results with various participants.

During the course of the programme, the researchers will participate in *international conferences* (starting August 2007) in order to present results and exchange experiences with other researchers.

Maintaining and updating the *website*.

During (the latter stages of) the programme, a number of *scientific articles* will be published.

Budget

We estimate the budget required is at present an average of SEK 3.5 million a year for seven years. For a developed budget, please see *Appendix 1*.

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