
Poverty and Social Exclusion: Is this a Problem in Rural Areas in the Visegrád Group Countries?

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Abstract:

Purpose: The aim is to reveal and determine the current state of poverty in rural areas in the regions of the Visegrád Group. By comparing the basic features used for measuring poverty, it has been pointed out that there are spatial differences between the regions analyzed.

Design/Methodology/Approach: The basic indicators used in this area include the income measure, the relative poverty indicator (at-risk poverty rate – ARPR) and the aggregate indicator (at-risk-of-poverty and social exclusion – AROPE).

Findings: In many households in rural areas, as in Poland and Hungary, there is a problem consisting in the fact that financial resources are insufficient to cover the basic needs. As it results from the analyses (especially from at-risk-of-poverty indicator after deducting housing costs), the level of satisfying the remaining needs in rural areas is very low.

Practical Implications: This issue is important not only in theoretical term, but also for application purposes. Many households in the Visegrád Group area experience poverty. According to the analyses, the problem of the risk of poverty concerns especially rural residents in Poland and Hungary. It is necessary to take measures in the sphere of social policy that would limit the threat of social exclusion.

Originality/Value: Social exclusion and poverty are alarming problems for modern societies – they are obstacles in achieving sustainable social development. The paper discusses important and current issues related to poverty and social exclusion in rural areas in the Visegrád Group countries.

Keywords: Poverty, social inequality, family economics, rural areas, V4.

JEL codes: I32; D31.

Paper type: Research study.

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1. Introduction

Social exclusion and poverty are alarming problems for modern societies – they are obstacles in achieving sustainable social development (Sinding, 2009; Okech *et al.*, 2012; Spencer and Komro, 2017; Marchand *et al.*, 2019; Prattley *et al.*, 2020; Lin *et al.*, 2020). These are complex and multidimensional phenomena that depend on economic, sociological, cultural and political factors (Annoni *et al.*, 2015). Important factors in this respect include economic conditions (income inequalities, material poverty), features impeding the use of common social resources (disability, addiction, etc.), no access to appropriate institutions (functional negligence, spatial mismatch). The above list does not include all the factors. The risk of poverty has a clear territorial dimension and contributes to lowering the quality and standard of living (Atkinson, 2013; Jonsson *et al.*, 2016; Šoltés *et al.*, 2016; Węziak-Białowolska, 2016; Rupeika-Apoga *et al.*, 2019). The research on the regional inequality of poverty and its quantitative expression at the regional level are important issues from the point of view of creating and implementing the regional development strategy (Michálek and Výboštok, 2018). An indispensable part of social and regional policy is information about poverty from the point of view of population groups and location (Michálek and Madajová, 2019).

Reducing the level of poverty and social exclusion is one of the key objectives of the European Union, also included in the Europe 2020 strategy (Iwacewicz-Orłowska, 2017; Rogge and Kontinen, 2018; Ayllón and Gábos, 2017; Pečiak and Tusińska, 2015). The literature of the subject indicates characteristic features of the phenomenon of social exclusion in the European Union and in individual European countries, its dimensions, mechanisms and manifestations (Thalassinos and Pociovalisteanu, 2009; Thalassinos *et al.*, 2012). The literature of the subject describes various symptoms of poverty and social exclusion (Su *et al.*, 2020). The spatial scope of this study concerns the Visegrád Group. In spite of relatively close geographical locations as well as similar historical and cultural identity, there are significant differences in shaping of the socio-economic factors within the subject in question.

This also applies to the research on the problem of poverty in rural areas. As it results from research, there is a structural similarity in the development of peripheral areas in the Czech Republic and Hungary. However, the Hungarian case corresponds, to a degree much higher than the Czech case, to the concept of periphery defined as interrelated processes of economic problems, accumulation of poverty, social exclusion, and shrinking of population, which concern particularly remote rural settlements (Tagai *et al.*, 2018). Sirovátka and Mareš (2006) emphasize that the poverty index in the Czech Republic is one of the lowest in Europe. The authors have described that the practice in the scope of social policy is effective, but it may appear to be not sustainable in a long term perspective. Other researchers indicate that the Czech Republic is a sustainable country in terms of disposable incomes of households (Janský *et al.*, 2016). Poverty is also an important problem in

Slovakia, especially in the eastern and southern parts of the country. The areas that are affected by poverty to a highest degree are characterized by a relatively highest share of children and young people in the population.

The problem is most distinct in the Romani ethnicity predominates in rural areas (Michálek and Veselovská, 2015). Poverty occurs also in rural areas of Poland, where many phenomena limiting the development of their residents accumulate. Insufficient level of education and professional qualifications, lower life aspirations, more difficult access to the labor market are among the factors that contribute to this situation (Raczowska, 2012). Economic conditions, including stratification of income in urban and rural households, are very important problems related to the issues discussed here. In Poland, the differences between urban and rural areas in this scope (income disproportion) are significant, which poses a risk to the sustainable social development and to the quality of life of the population at an appropriate and equal level (Murawska, 2017; Kozera *et al.*, 2014).

2. Purpose, Methodology and Sources of Information

Poverty affects individual social groups to a different degree. In this study, a special attention was paid to rural residents. The context of the study is associated with the problems of poverty and social exclusion in rural areas (Barbier and Hochard, 2018; Aggarwal, 2018; Smith and Wills, 2018; Thalassinos *et al.*, 2019). The aim of the study is to reveal and determine the current state of poverty in rural areas in the countries and regions of the Visegrád Group. By comparing the basic features used for measuring the poverty, it has been pointed out that there are spatial differences between the regions analyzed. This study is based on the analysis of selected indicators developed and agreed upon by the Indicators` Sub-Group of the Social Protection Committee – ISG SPC.

The basic indicators used in this area include the income measure, the relative poverty indicator (at-risk poverty rate – ARPR) and the aggregate indicator (at-risk-of-poverty and social exclusion – AROPE). The AROPE indicator is constructed based on three criteria proposed by the Statistical Office of the European Union (Eurostat) in the framework of its Europe 2020 Strategy: the poverty risk rate, a severe lack of material goods and belonging to households that present very low labour insertion. A person is at risk of poverty and/or social exclusion when he or she meets at least one of the three criteria (Gómez-Torres *et al.*, 2019).

At-Risk-of-Poverty-Rate (ARPR) is an important index in describing the inequality of an income distribution (Corsi *et al.*, 2016). This indicator corresponds to the sum of persons who are at risk of poverty or severely materially deprived or living in households with very low work intensity. At risk-of-poverty are persons with an equivalised disposable income below the risk-of-poverty threshold, which is set at 60 % of the national median equivalised disposable income (after social transfers) (https://ec.europa.eu/eurostat/web/products-datasets/-/t2020_50).

In addition, a method of critical analysis of literature and other secondary source materials was used in this study.

3. Risk of Poverty and Social Exclusion in Rural Areas of Visegrad Group Countries – A Comparative Approach by Countries and Regions

In 2017, 112.8 million people in the EU lived in households at risk of poverty or social exclusion (22.4 % of the population). In the Czech Republic, Hungary, Poland and Slovakia this indicator was respectively: 12.2%; 25.6%; 19.5% and 16.3% (https://ec.europa.eu/eurostat/statisticsexplained/index.php?title=File:People_AROP_E_2019_4.1.png). A comparison of the analyzed indicator in individual regions of the Visegrád Group countries seems interesting (Table 1).

Table 1. People at risk of poverty or social exclusion by NUTS regions in V4 countries [%]

Specification	2014	2015	2016	2017
	[%]			
<u>Czechia</u>				
Praha	10.2	10.6	10.1	9.4
Střední Čechy	9.8	10.0	10.3	10.4
Jihozápad	12.5	11.2	10.0	9.7
Severozápad	21.9	21.7	19.5	16.7
Severovýchod	14.0	10.2	11.7	9.9
Jihovýchod	12.8	12.6	11.5	11.7
Střední Morava	17.0	16.4	13.1	12.3
Moravskoslezsko	22.5	21.7	22.1	19.2
<u>Hungary</u>				
Közép-Magyarország	29.1	24,3	22,8	22.3
Dunántúl	27.8	25.0	22.3	22.6
Közép-Dunántúl	23.4	24.3	21.3	18.4
Nyugat-Dunántúl	23.6	19.4	18.4	20.0
Dél-Dunántúl	37.5	31.7	27.8	30.3
Alföld és Észak	36,9	33.6	32.0	30.4
Észak-Magyarország	41.7	37.3	37.6	36.1
Észak-Alföld	38.8	34.6	32.1	29.2
Dél-Alföld	30.2	29.1	26.7	26.5
<u>Poland</u>				
Makroregion Południowy	21.7	21.6	20.8	19.7
Region Wschodni (NUTS 2013)	29.1	27.6	27.7	25.9
Makroregion Północno-	24.0	23.7	21.6	19.9
Makroregion Południowo-	24.1	21.0	22.1	16.0
Makroregion Północny	27.5	25.5	21.5	19.0
<u>Slovakia</u>				
Bratislavský kraj	16.5	16.2	13.8	8.6
Západné Slovensko	15.4	15.8	15.3	13.6
Stredné Slovensko	20.2	20.5	19.7	17.9
Východné Slovensko	21.0	20.4	21.7	21.0

Source: <http://appsso.eurostat.ec.europa.eu/nui/>

Considering individual regions in the Visegrád Group countries, it is worth noting that in 2017 the AROPE indicator at a level above 25% was recorded in five regions in Hungary (Dél-Dunántúl; Alföld és Észak; Észak-Magyarország; Észak-Alföld; Dél-Alföld) and in one region in Poland (eastern region). In 2017, the highest levels of this indicator were recorded in the Czech Republic (in the Moravskoslezsko region – 19.2%) and in Slovakia (in the Východné Slovensko region – 21.0%).

According to the analyses, during the investigated period this indicator increased in one region (Střední Čechy – an increase by 0.6 percentage point). In 2014–2017, this indicator remained at the same level also in one region (Východné Slovensko, 21% both in 2013 and 2017).

It is worth noting that in 24 out of 26 regions, the level of the indicator in 2014–2017 decreased, while the highest decrease was recorded in:

- the Czech Republic - in the Severozápad region (by 5.2 percentage points);
- Hungary – in the Észak-Alföld region (by 9.6 percentage points);
- Poland – in the south-western region (by 9.1 percentage points);
- Slovakia – in the Bratislavský kraj region (by 7.9 percentage points).

The Visegrád Group is a cultural and geopolitical alliance of four Central European countries – the Czech Republic, Hungary, Poland and Slovakia. These countries have a common history. It can be stated that they are characterized by similar historical and economic conditions of development. The structures of these economies are very similar (Kopackova, 2019; Samborski, 2019). Countries of the Visegrád Group have a very large production potential in the scope of agriculture, which is proved, *inter alia*, by the agricultural land resource, the number of domestic animals, and the labor force resource. Nevertheless, the agricultural sector of the Visegrád Group countries is characterized by a considerable differentiation, *inter alia*, in terms of the average size of agricultural holding, agrarian structure and employment (Rovný, 2016; Firlej *et al.*, 2017; Piwowar, 2017; Luboslav *et al.*, 2018). When analyzing the scale of social exclusion in rural areas in the Visegrád Group countries, it should be indicated that this problem affects a significant percentage of people living in these areas (Table 2).

Table 2. People at risk of poverty or social exclusion in rural areas in V4 countries in 2009-2017 in %

Specification	2009	2010	2011	2012	2013	2014	2015	2016	2017
Czechia	14.1	16.1	16.7	15.3	15.2	15.2	12.8	11.4	11.6
Hungary	33.3	34.7	36.3	39.2	40.5	37.8	32.5	31.3	31.0
Poland	33.6	33.9	32.7	33.2	32.5	31.2	30.0	27.9	24.2
Slovakia	23.5	24.8	23.8	24.8	21.5	20.8	20.6	21.8	18.3
UE28	29.0*	29.1	29.2	27.0	27.5	27.1	25.5	25.5	23.9

Note: *UE27

Source: <http://appsso.eurostat.ec.europa.eu/nui/submitViewTableAction.do>

As it results from the comparison, the percentage of people at risk of poverty or social exclusion in rural areas in the V4 countries decreased in the analyzed years, and in 2017 it was:

- 11.6% in the Czech Republic (a decrease by 2.5 percentage points as compared with 2009);
- 31% in Hungary (a decrease by 2.3 percentage points as compared with 2009);
- 24.2% in Poland (a decrease by 9.4 percentage points as compared with 2009);
- 18.3% in Slovakia (a decrease by 5.2 percentage points as compared with 2009).

The scale of the risk of poverty is the lowest in the Czech Republic and the largest in Hungary. Also in Poland this indicator is higher than the EU average. It should be emphasized that the situation in Hungary and Poland improved dynamically in 2013–2017. The AROPE indicator was also analyzed (in relation to people living in rural areas). The results of the research in this area are presented in Table 3.

Table 3. *At-risk-of-poverty rate in rural areas in V4 in 2009-2017 in %*

Specification	2009	2010	2011	2012	2013	2014	2015	2016	2017
Czechia	8.5	10.2	11.2	10.4	9.5	10.7	9.1	8.5	8.7
Hungary	17.1	17.7	19.2	21.5	21.9	21.0	18.7	18.9	16.0
Poland	22.8	23.5	23.4	24.2	25.0	24.1	24.8	23.9	20.1
Slovakia	14.6	15.6	16.4	17.2	15.4	16.2	15.0	17.3	14.8
UE28	20.9*	20.6	20.9	19.6	19.9	20.1	19.8	19.8	18.9

Note: *UE27

Source: <http://appsso.eurostat.ec.europa.eu/nui/submitViewTableAction.do>

Considering the share of people with disposable income below the poverty risk threshold (i.e. 60% of the national median of the equivalent disposable income), it should be emphasized that the risk of poverty in rural areas in the Visegrád Group countries is the highest in Poland (in 2017 the indicator was at a level of 20.1%). In the analyzed period, the lowest value of the indicator was recorded in the Czech Republic. In 2009–2017, the indicator for the Czech Republic was about two times lower than the average in the European Union. In turn, in each of the analyzed years, the indicator for Poland was higher than the average in the European Union.

Housing costs constitute an important element taken into account in the analyses in the scope of poverty and social exclusion. They affect the individual disposable income, especially in the poorer part of the population, which is why they are included in analyses related to poverty (Annoni and Węziak-Białowska, 2016). It is also worth emphasizing that the poverty related to housing costs is a key element of the energy poverty (Burlinson *et al.*, 2018; Mendoza Aguilar *et al.*, 2019; Middlemiss *et al.*, 2019; Primc and Slabe-Erker, 2020; Betto *et al.*, 2020; Castaño-

Rosa *et al.*, 2020). The indicators that take into account these costs in the investigated subject area are presented in Table 4.

Table 4. *At-risk-of-poverty rate after deducting housing costs (rural areas in V4) in %*

Specification	2009	2010	2011	2012	2013	2014	2015	2016	2017
Czechia	27.1	28.9	28.4	26.9	27.3	27.3	26.3	24.9	23.7
Hungary	36.8	41.0	42.7	44.9	45.4	41.9	36.7	37.4	35.3
Poland	38.5	40.1	39.9	41.0	41.2	41.2	40.6	37.2	33.0
Slovakia	33.3	33.5	32.5	35.3	30.4	32.1	31.6	32.5	30.4
UE28	36.4*	35.8	35.6	34.4	35.1	34.8	33.9	33.1	31.6

Note: *UE27

Source: <http://appsso.eurostat.ec.europa.eu/nui/submitViewTableAction.do>

As it results from the analyses, when the costs of maintaining a flat or a house are taken into account in the ARPR indicator, the risk of poverty in the investigated subject area increases significantly. In 2017, the indicator that takes into account the costs of living was higher in Hungary (35.3%) and Poland (35%) than the average in the European Union (31.6%), while in Slovakia the value of this indicator was a little lower (30.4%). As in the previous analyses, the best situation was in the Czech Republic. When comparing 2009 and 2017, it is worth noting that in the Visegrád Group countries this indicator decreased. In each of these countries it decreased by less than 6 percentage points (in the Czech Republic by 3.4 percentage points, in Hungary by 1.5 percentage point, in Poland by 5.5 percentage points, and in Slovakia by 2.9 percentage points).

4. Conclusion

In spite of relatively short distances in the analyzed area, there is a considerable internal differentiation within the category of poverty. Statistical data indicate that the relatively best situation in the Visegrád Group countries is in the Czech Republic, while the worst ones – in Poland and Hungary. Rural areas are the largest beneficiaries of community assistance, however most of the assistance is allocated for the agricultural development and thus it only slightly improves the standards of living of rural residents.

In many households in rural areas, especially in Poland and Hungary, there occurs a problem consisting by the fact that financial resources are insufficient to cover the basic needs. As it results from the analyses (especially from at-risk-of-poverty indicator after deducting housing costs), the level of satisfying the remaining needs in rural areas is very low. There is a need to improve the working and living conditions in rural areas, especially in five regions in Hungary (Dél-Dunántúl, Alföld és Észak, Észak-Magyarország, Észak-Alföld, Dél-Alföld) and in one region in Poland (eastern region).

It is a challenge for administration at the national and local levels. Regional and local programs should be oriented at social cohesion, reduction of inequalities and limitation of poverty in the analyzed regions. An improvement is needed primarily in the income situation of rural residents in the investigated areas (the income is often insufficient to meet the basic needs). This problem should be monitored and evaluated more extensively. It is also a challenge for many scientific disciplines – economics, psychology, medicine and sociology.

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