

THE TERRITORIAL DIMENSION OF SOCIAL EXCLUSION IN EAST-CENTRAL-EUROPE

A TÁRSADALMI KIREKESZTETTSÉG TERÜLETI JELLEMZŐI KELET-KÖZÉP-EURÓPÁBAN

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Abstract

The paper focuses on introducing spaces of social exclusion in East Central Europe and interpreting spatial processes of the area within this framework. In order to interpret the multidimensional characteristics of social exclusion, domains and dimensions of the phenomenon are represented while territorial aspects of exclusion are illustrated by the generalization of spatial patterns.

Research questions touch upon that what kind of spatial dimensions differentiate territorial aspects of social exclusion in East Central Europe, and what relationships can be discovered between them and other social characteristics. Furthermore, the paper summarize the changes in territorial patterns of social exclusion took place during the 2000s in East Central Europe.

Keywords: social exclusion, social conditions, spatial processes, East Central Europe

Abstract

A tanulmány azt kívánja bemutatni, hogy melyek Kelet-Közép-Európában a kirekesztettség terei, és hogyan értelmezhetők ebben a keretben a térségbeli területi folyamatok. A társadalmi kirekesztettség többdimenziós jellegének megragadása érdekében egyrészt az egyes tényezők, tényezőcsoportok kerülnek értékelésre, míg a kirekesztettség általános térbeli jellemzői a különböző területi mintázatok generalizálása alapján válnak interpretálhatóvá.

A tanulmányban feltett kérdések arra is választ keresnek, hogy melyek a társadalmi kirekesztettség területi jellemzőinek megosztó dimenziói Kelet-Közép Európában, és hogy milyen összefüggések tárhatók fel ezen tényezők és egyéb társadalmi jellegzetességek között. Ezen kívül a tanulmány arra is kitér, hogyan változtak a kirekesztettség területi jellemzői Kelet-Közép-Európában a 2000-es évek eleje óta.

Keywords: társadalmi kirekesztettség, társadalmi jellemzők, területi folyamatok, Kelet-Közép-Európa

INTRODUCTION

The European Commission launched the European Union's ten-year growth strategy in 2010 (European Commission, 2010). The three priorities of Europe 2020 strategy aim at delivering such a growth in the European Union that is smart, sustainable and inclusive. In this case

inclusive growth refers to the promotion of economic, social and territorial cohesion and to achieve high employment rates all over Europe. Specific targets relating to this priority aim to raise employment rates, improve qualification by reducing the rates of early school leaving and raising rates of those who achieve high qualification (third level education), and finally fighting poverty and social exclusion by reducing the number of people at risk of poverty and social exclusion (or endangered by poverty and social exclusion) by 20 million.

Actions against poverty and social exclusion could only be really effective if the territorial targeting of interventions is also appropriate, namely, if decision-makers are also aware of spatial patterns of these phenomena, and if places which need the most interventions against poverty and social exclusion can be identified at local and regional levels. Widening of the information base of these policy ambitions is supported by ESPON TiPSE project which focused on the territorial dimension of poverty and social exclusion in Europe. The project attempted to identify spatial characteristics of poverty and spatial exclusion, and analyse the variegated social and institutional background of these spatial patterns.

The aim of this study is to introduce several characteristics of spatial inequalities in East Central European by focusing on symptoms associated with social exclusion. It makes an attempt to delineate generalized but typical spatial patterns, interpret social and economic characteristics related to them and make reflections to socio-economic changes of the past decade in East Central Europe.

CONCEPTUALIZATION OF SOCIAL EXCLUSION

Definitions of people at risk of poverty and social exclusion used in different policy contexts in the European Union conceptualize the two phenomena in a common framework – i.e. the union of the sets of ratio of people living under the poverty threshold, ratio of people living in severe material deprivation and ratio of people living in households with very low work intensity –, by reflecting on the overlap and the interrelationship of these ideas (Andriani–Karyampas, 2010; Talbot et al. 2012). Nevertheless, it is worth to make a difference between poverty and social exclusion. According to the approach used by TiPSE research the two phenomena are interrelated in many different ways, however social exclusion is a more complex and manifold idea than poverty itself. Potential points of distinction according to Silver (1994), Jehoel-Gijsbers and Vrooman (2007), Talbot et al. (2012) and Copus (2014):

- Social exclusion is more a dynamic process rather than a static state, which leads to the exclusion of people or groups of people from different social systems.
- It is worth to add that contrary to poverty social exclusion affects groups of people more than individuals themselves.
- Another important point of distinction is while poverty is essentially related to the problem of distribution of resources, the basis of social exclusion is relationality: the duality of inclusion and exclusion, interpreted at different social levels and scales (society, institutions, individuals etc.).
- Finally, it can be noted that contrary to the basically financially defined idea of poverty, social exclusion is a multidimensional phenomenon, which endangers individuals and groups of people as a result of different, but potentially interrelated social factors.

Besides poverty, the concept of social exclusion is often associated with marginalization. The idea of marginalization is also manifold and complex, and it is based on overlapping interpretations. Nagy et al. (2015) consider marginalization as a socio-spatial process, which is a production of changing societal conditions which weaken linkages between individuals, groups and other parts of the society and cause a boost of declination of social groups and spaces. Marginalization has very similar roots to social exclusion. According to Berndt and Colini (2013) several authors use these concepts and synonyms. They also suggest that the difference between exclusion and marginalization is context dependent, since questions of exclusion focus more on individuals and social groups, while marginalisation is more associated with political and economic conditions.

DOMAINS, DIMENSIONS AND INDICATORS

The dynamic character, context-dependence coming from relationality and the multidimensional determination not only make a conceptual distinction between poverty and social exclusion (and marginalization), but it also essentially influences that how spatial features of social exclusion can be measured and visualized. By building on the conceptual definition mentioned above TiPSE research used a deductive way of thinking by drawing on the domains of social exclusion for the European space identified by the academic and policy literature (Czirfusz, 2014)

It is based on the following train of thoughts. In order to apprehend the multidimensional character of social exclusion Philip and Shucksmith (2013) and Reimer (2004) identified four social systems (institutions) in which different processes and phenomena induced by social exclusion might act:

- Market relations, or private systems;
- Bureaucratic relations, or state administrative systems;
- Associative relations, i.e. collective action processes based on shared interests;
- Communal relations based on shared identity, among family and friends networks.

Individuals or social groups could be excluded from the access to different social systems in many ways; furthermore these processes are usually strongly interrelated. In order to derive (the state and the process of) social exclusion into a statistically measurable form Talbot et al. (2012) identified four – relatively separable – domains of exclusion which relate to the above mentioned social systems:

- Earning a living;
- Access to basic services;
- Social environment;
- Political participation.

These social systems and the listed domains used in the spatial analysis of social exclusion are not exactly fit to each other point by point, however they have a quite strong correlation (Czirfusz, 2014). Czirfusz analysed the interrelationship between social systems affected by exclusion and domains serving the identification of spatial patterns of social exclusion principally on the basis of European Union policy documents (cohesion reports, commitments of the European Commission). Within these documents the four identified domains do not involved in an explicit way, but the policy literature usually deals with such dimensions of social exclusion which can be labelled as parts of different domains.

TiPSE research did not undertake the representation of spatial aspects of social exclusion in a complex way by composing different patterns in domains, but attempted to visualize the analysed factors separately. It was supported by the review of a wide range of potential exclusion dimensions (Talbot et al. 2012; Czirfusz, 2014). These single dimensions can be visualized by exact measures, and in the analysis every dimension is represented by one or more indicators (Tab. 1).

Table 1 Domains, dimensions and indicators of social exclusion

<i>Domain</i>	<i>Dimension</i>	<i>Number of indicators</i>
<i>Earning a living</i>	Income	2
	Employment	4
<i>Access to basic services</i>	Health	3
	Education	2
	Housing	3
<i>Social environment</i>	Age	3
	Ethnic composition	1
	Immigrants	1
	Household structure	2
<i>Political participation</i>	Citizenship	1

Source: own elaboration

The selection of analysed indicators was driven by the considerations of having appropriate representations of exclusion in the given dimensions through the chosen measures, having a policy support by being conventionally used in European policy documents, and it was also important to have measurable indicators at certain spatial levels used in the analysis (Czirkusz, 2014).

Among indicators of dimensions analysed in the domain of ‘earning a living’ those measures can be found which reflect on forms of exclusion related to the ability of having a given level of income (disposable income, disadvantaged occupation status), and which relate to different forms of exclusion from the labour market (inactivity, unemployment, gender gap in activity). The poor accessibility of basic services was another analysed form of social exclusion. It might be related to shortcomings of different services of general interests (health status – measures of life expectancy and healthcare infrastructure; qualification – indicators of educational attainment), but it might also involve several forms of exclusion which relate to inadequate housing conditions (e.g. lack of bathroom or flush toilet).

Social environment has many aspects in which processes of exclusion might act. Age-related forms of exclusion are represented by different measures of dependency rates. At the same time, characteristics of household structure in ‘social environment’ domain (ratio of lone parent or overcrowded households) are also related to vulnerabilities to exclusion from earning a living. In East Central Europe the potential exclusion related to ethnic composition is represented by the ratio of Roma population. Risks of exclusion related to the perspectives of immigrant population are illustrated by the ratio of foreign-born population. This measure is similar in many senses to the ratio of non-citizen population which represents the form of

exclusion from citizen rights in ‘political participation’ domain. (The complete list of indicators can be read in Czirfusz, 2014.)

Measures applied in the analysis certainly have a broader meaning rather than we might directly and exclusively link them to concrete forms of social exclusion. Their validity is also weakened by the fact that every European country has such institutions and social systems which can reduce the vulnerability to exclusion. Furthermore, other factors are more related to traditional or cultural makings and other local, context-dependent phenomena, so their indicators do not measure exclusion itself in a direct way. Although considering these constraining factors, the analysis identified those regions as being endangered by social exclusion in one or another domains and dimensions, where applied indicators had a high value referring to disadvantaged conditions (Talbot et al. 2012).

Analysed measures were represented at NUTS3 level (except for some indicators available only at NUTS2 level – disposable income, health condition). In order to use comparable, harmonized and available datasets at NUTS3 level in the research, data analysis is primarily based on census data bases. This decision was also justified by that country censuses has a broad coverage of themes of data which could be used in a suitable way to analyse social exclusion. In order to illustrate spatial patterns of exclusion in East Central Europe country censuses from 2011 were taken into account, nevertheless the need for interpretation of the process aspect of social exclusion made necessary the involvement of data from 2001 censuses as well.

SPATIAL PATTERNS OF SOCIAL EXCLUSION IN EAST CENTRAL EUROPE

Apart from a Europe-wide analysis, macro-regional analyses were also carried out in TiPSE research. The conceptual basis of the distinction of an East Central European macro-region is rooted in that there are more significant differences between the countries of the area and other parts of Europe, compared to the internal differences within both groups, due to the long-lasting heritage of Socialism (systemic characteristics, inherited institutions etc.) and to the different path of development on the way towards integration into the European social and welfare regimes (Fenger, 2007, cited by Talbot et al. 2012).

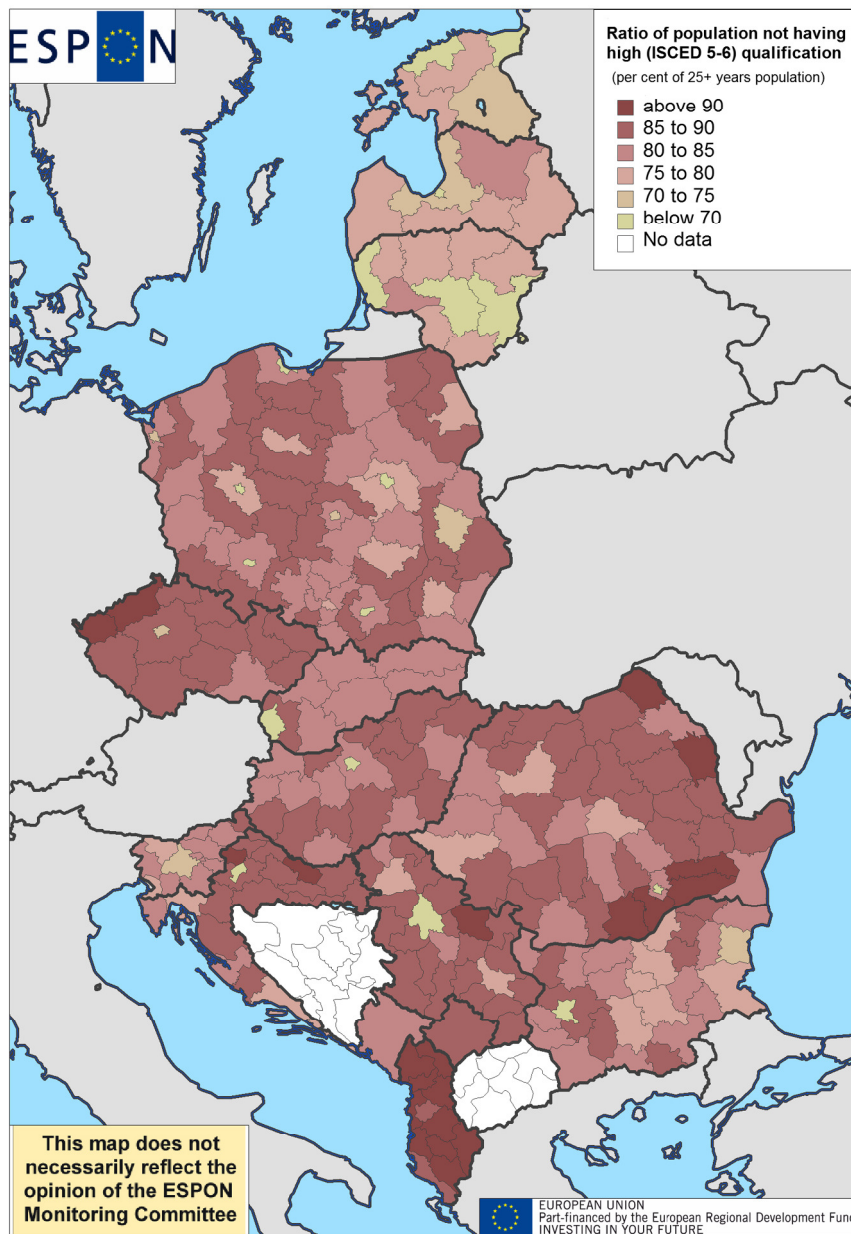
Until the 2000s there was little understanding for social exclusion as such in many of the East Central European countries. Due to a more egalitarian way of income distribution of the former socialist regimes the ‘old’ poverty was mainly related to the stages of life cycle – differentiating between living conditions of the working age groups and the elderly ones

(Vecernik, 2004). Social processes after the political change of regime and the economic transformation (economic reforms, structural adjustments) impacted negatively by the reduction of real incomes and the fast increase of inequalities or unemployment (Golinowska, 2002; Paas, 2003; Vecernik, 2004). In this context social exclusion was reduced to a problem of dysfunction of social systems (under the newly formed capitalist social relations) and often was replaced by poverty as a synonym of it. Social exclusion in the countries of the macro-region is often related to the 'new' poverty, describing the manifestations of the negative consequences of socio-economic transformation (as unemployment, homelessness, housing, financial defects etc.) which cannot be treated by the same way like poverty (Stankuniene, 1998; Golinowska, 2009).

Besides East Central European (and Baltic) member states of the European Union the recent analysis covers the West Balkan countries (former republics of Yugoslavia, Albania) as well, which are actual candidates of EU membership. Due to this broad territorial coverage social exclusion has many aspects that differentiate between countries of East Central Europe. Particularly employment, housing and education are those dimensions in which risks associated with social exclusion are higher in countries with more disadvantaged socio-economic conditions (e.g. Albania, Bulgaria, Kosovo, Serbia) than in those states which have more favourable position (Czech Republic, Slovakia, Slovenia).

Besides these differences, patterns of social exclusion in East Central Europe are generally delineated by regional inequalities within countries. Among all of the divisive factors urban–rural differences are the most clearly visible. These patterns could be discernible in most dimensions of the analysed exclusion domains. Urban regions are usually concentrations, 'hot spots' of economic activity, thus risks of exclusion associated with earning a living are frequently lower in these areas. In urban regions income conditions are more favourable, and employment opportunities are also better and more balanced – contrary to Western Europe, unemployment in East Central Europe has a more 'rural' face.

Rural regions in East Central Europe are in a multiply-disadvantaged situation according to their opportunities of accessing basic services. Risks of exclusion related to the insufficient accessibility of health infrastructure are usually higher in rural areas than in urban regions. Moreover, the population of rural regions in East Central Europe is less qualified in many cases, and that significantly influences their participation/exclusion rates from the active labour market too (Fig. 1.). Generally worse housing conditions in rural areas might also be associated with potential dangers of social exclusion.

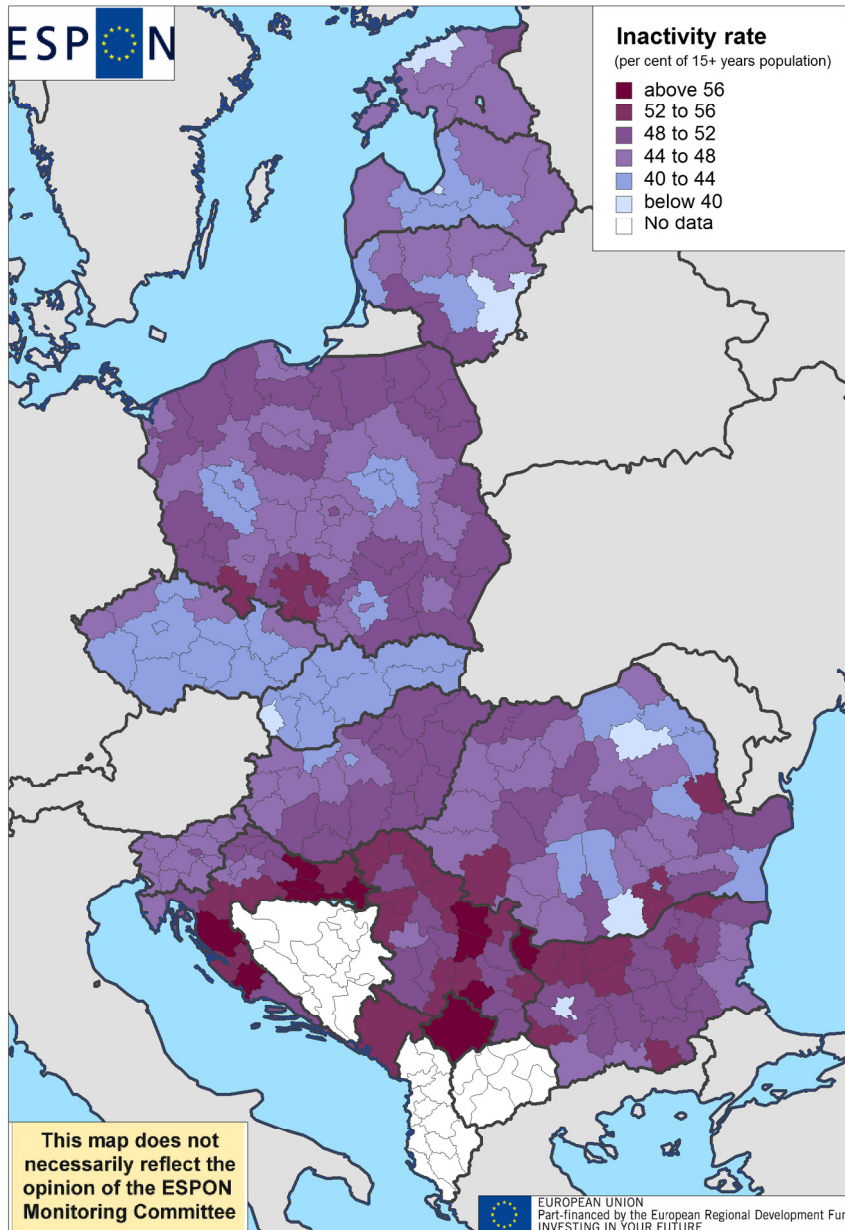
Figure 1 Ratio of population not having high qualification, 2011

Source: Own elaboration based on TiPSE database

Risks of exclusion related to age structure are more differentiated than having a clear ‘urban’ or ‘rural’ face in East Central Europe. In several cases (e.g. Hungary, Poland) elderly population is more concentrated in urban and capital city regions, but it is not a general spatial pattern in the macro-region. Figures of household composition can also have a ‘rural’ or an ‘urban’ aspect too. For instance, the ratio of lone parent households is significantly higher in urban regions of East Central Europe. Contrary to that, overcrowded (6+ members) households and potential related dangers of social exclusion are most common in rural areas. An urban character might also be observed in the spatial distribution of immigrant and non-citizen population, since bigger cities might serve as gateways for those who arrive there to

settle down from abroad. In this way, risks of exclusion associated with these dimensions are also more frequent in urban regions.

Figure 2 Inactivity rate, 2011



Source: Own elaboration based on TiPSE database

Rurality in East Central Europe usually has a strong interrelationship with peripherality. The formerly mentioned disadvantages not only affect the population of a given territory because it is not an urban region, but because it has a peripheral location, where the often poor accessibility strongly determines actual social and economic conditions – for instance, the opportunities of participation in the labour market or the access to basic services. Less workplace, lower levels of disposable income, constraints of accessing health and education

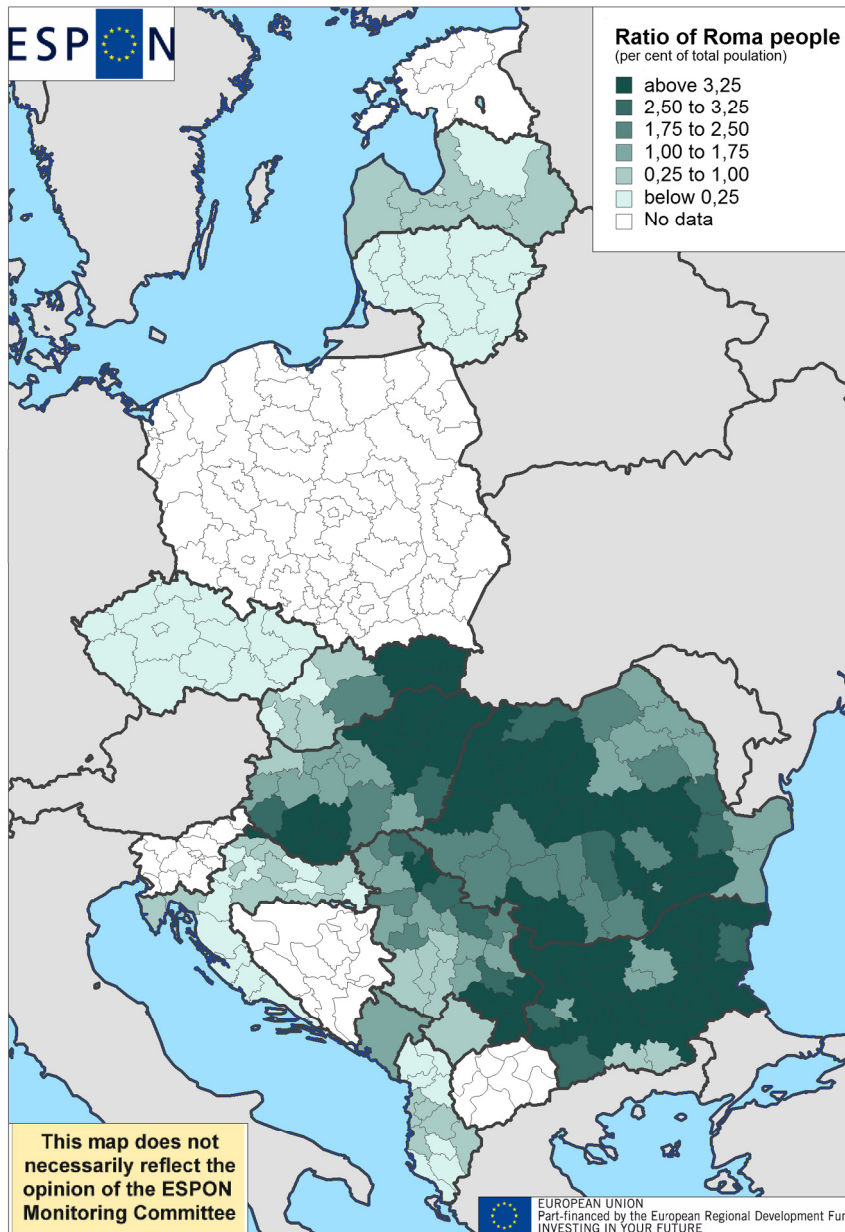
services might both raise the risks of social exclusion in these areas (Fig. 2.) In many cases, the more qualified and active part of population aims to settle down in more attractive regions. An indirect measure of this process might be identified in the higher rates of elderly people in peripheral areas.

Some aspects of peripherality, like coastal or mountainous location are less likely to be present in East Central Europe among the determinants of spatial patterns of social exclusion. Nevertheless, isolation of mountainous areas might lead to exclusion, especially in the Western Balkan countries, due to inadequate access to education or health services (Matković, 2006). Nevertheless, many typical factors of differentiation in the macro-region are related to border regions. Systems of services of general interests (e.g. education, health) and the elements of housing infrastructure are built up within a given country, by following closed borders, and in border regions, far from core areas the same level of supply is often less accessible. In the same way, risks of exclusion associated with dimensions of 'earning a living' domain are also higher in border areas. The ratio of foreign-born population might also be higher in border regions; however this condition does not automatically carry a risk of social exclusion.

Peripherality related spatial patterns of social exclusion in East Central Europe often reflect on the general image of spatial inequalities of a given country. Whereas in several cases, spatial characteristics related to exclusion are hard to identify due to the overlap of the formerly mentioned spatial patterns. Where there are more dimensions showing a higher risk of social exclusion, those regions might be considered as lagging or depression areas within the given country. Such regions might be the eastern (and western) peripheries of Poland, the north-western part of Czech Republic, eastern regions in Slovakia and Hungary, inner peripheries of Croatia or the connecting border area of Serbia, Bulgaria and Romania.

Regions with significant and multiple risks of exclusion often have an overlap with those areas where the ratio of Roma population is also high (Fig. 3.). Roma people in most countries of the macro-region are highly vulnerable to dangers of social exclusion. They are more affected by labour market-related disadvantages, their inactivity and unemployment rates are higher, and many of them work in elementary occupations. Their disadvantaged position is in relation with their lower qualification features, which might potentially be a result of their poorer access to services (of education). In the same way, risks of exclusion associated with health and housing conditions are also higher among Roma people. Their case illustrates how factors of social exclusion are interrelated and how they might boost each other's impact.

Figure 3 Ratio of Roma population, 2011



Source: Own elaboration based on TiPSE database

CHANGING PATTERNS OF SOCIAL EXCLUSION

Analyses in the TiPSE research enabled to follow the process aspect of social exclusion (by comparing figures and spatial patterns based on 2001 and 2011 census data), although changes over time relating to the applied indicators do not always represent the alteration of vulnerability to exclusion. Life expectancy, several features of housing conditions or educational attainment all became more favourable between 2001 and 2011 in the area. These positive tendencies especially affected already prosperous urban areas and capital cities or, as a counterpart such lagging regions which had greater potential for improvement. These

dimensions, indirectly related mostly to the domain of ‘access to basic services’, are more or less on one-way paths, where regression can hardly be observed, or become apparent only in a long run, under the effect of disadvantaged conditions or processes of crisis.

Other social characteristics, more related to social environment or political participation may change in a shorter run, however the trends revealed have uncertain relationship with risks of exclusion. Nevertheless, such tendencies as intensified ageing processes might lead to a growing risk of exclusion in most of the countries of the macro-region, especially in different areas (mostly peripheral, rural parts) of Bulgaria, the Czech Republic, Serbia or Hungary. The ratio of foreign-born population and the proportion of inhabitants not possessing citizenship increased in East Central Europe between 2001 and 2011 (especially in capital cities), which presumably relates to the changing international role and increasing openness of these countries. At the same time, the question of migration related exclusion or inclusion became a sensitive question in East Central Europe too, due to past years’ migration tendencies – one can consider either the outmigration trends from former socialist countries to Western Europe or the changing transit role of these countries concerning international migration. Household structure is influenced by many factors (cultural, social or economic), and it cannot be declared that changes over the past decade (concerning lone parent or overcrowded households) directly affected vulnerability to exclusion. Contrarily, the increasing ratios of Roma population in disadvantaged regions potentially indicates an increasing risk of exclusion – in several countries of the macro-region –, since Roma people are among the social groups the most endangered by exclusion (labour market, education, housing etc. aspects) within that part of Europe.

Measures of activity and employment are able to represent more the effects of crisis derived from the set of applied indicators. Nevertheless, changes over a ten year term (2001–2011) do not reflect only on the effects of the past years economic processes, but they are significantly influenced by former development paths as well. The increase of inactivity rates has a more or less direct relationship with the phenomena of crisis years, when more and more people retreated from the active labour market. The pressed retreat from labour market participation affected structurally weaker countries more, whereas rural and peripheral regions of these states seemed to be less resilient to this form of vulnerability to exclusion. Unemployment rates (and in some countries youth unemployment rates too) has also been increased in the past years due to the economic crisis, however actual levels are still generally lower than that of the early 2000s, thanks to the former economic prosperity of these countries the after the Millennium. Gender gaps related to labour market participation became tighter

since 2001 in many countries. Unfortunately, this is not only a sign of favourable equalisation, but for instance in the case of activity rates it indirectly refers to the equalisation effect of economic crisis – by showing the increasing proportion of inactive men.

CONCLUSION

Those processes which lead to the exclusion of certain social groups from different social systems leave their mark in the patterns of spatial inequalities in East Central Europe. The effects of determinants of (the multidimensional) social exclusion are often interrelated and they might strengthen each other. Spatial patterns delineated by these factors are not new elements in the analysis of spatial processes of East Central Europe, however they can reveal new aspects which might be useful in the interpretation of regional inequalities of the macro-region from the viewpoint of social exclusion. The analysed domains, identified spatial patterns and processes draw attention to operational deficiencies of social systems and services of general interests (and the socio-spatial impact of that) and to the long-term social impact of economic crisis. And it lays down the further steps of the research.

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