

THEORETICAL AND METHODOLOGICAL ASPECTS OF IDENTIFYING MARGINAL RURAL AREAS IN THE SLOVAK AND CZECH STUDIES

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ABSTRACT

This article is devoted to the topic of rural areas in terms of theoretical and methodological aspects of identifying marginal areas with an emphasis on Slovak and Czech studies. Concept of marginality and peripherality in geography is closely linked to rural areas. However, these attributes may not be applied on rural environment exclusively. There are several discrepancies with its application – from theoretical approaches to understanding this concept as well as in applying different methods when identifying marginal and peripheral regions. Thus, based on brief theoretical input we try to present practical examples and studies related to the identification of marginal regions in Slovakia and Czech Republic with an emphasis on methodology and selected indicators. Through the analysis of 13 selected scientific papers we have focused on the character of the study, number of indicators and frequency of its usage when identifying marginal and peripheral regions. Since most of the studies within this issue uses quantitative methods, we aimed to provide not only an overview of these methods, but also point out specific features of data collecting and processing, as well as outline alternative approaches for identifying marginal rural areas – qualitative methods that can enrich this topic.

Key words: marginality, peripherality, rural areas, methodology, indicators

INTRODUCTION

As a result of global transformation of society, rural environment began to change dramatically, both in terms of the basic structures of its population, diversification of economic activities or even the character of the countryside. In many cases, this internal restructuring led to negative effects and rural areas began to decline both economically and socially (Buchta, 2003). Rural-urban differences began to deepen and no wonder that soon rural areas lost its importance and became “outsiders” in society. This type of rural areas are therefore marked with attributes *peripheral* and *marginal*. In general, we can describe the meaning of those terms as attributes indicating a negative status of the locality or region, resulting from the throughout evaluation of pre-selected indicators (whether economic, social, demographic, environmental, etc.) (Máliková-Spišiak, 2013). Despite their rather similar nature, there is quite a considerable dichotomy in the perception of both terms. In general, as the most accepted approach, also used by many Slovak and Czech geographers, can be considered arguments of Italian geographer Andreoli (1994). She emphasizes the need for a broad and narrow understanding of the concept of marginality and peripherality. While in the first case, these two terms are considered to be synonymous, in the second one both terms are perceived as different entities.

Many researchers have began to paid more attention to this issue not only from theoretical point of view, but from empirical perspective as well. As a result, we can observe different approaches within this topic among scientific disciplines (predominantly geography and sociology), not only as far as theoretical aspects of definition of marginality and peripherality are concerned, but mostly in methodology of identifying marginal or peripheral areas. Further in this study we therefore attempt to introduce selected studies of Slovak and Czech geographers while analysing different methodologies of identifying marginal regions. Despite the fact that these methodologies are mostly built up on quantitative methods, qualitative methods may be considered as more than appropriate too. Thus, in the end of our study we point out the importance of qualitative methods as reasonable tool for identifying marginal regions.

MATERIAL AND METHODS

This study is based primarily on an analysis of selected studies of Czech and Slovak authors mainly from geography (11 of 13), which present different perspectives and approaches to the study of marginal areas and use theoretical knowledge for the final delimitation of specific marginal regions. During our analysis, we point out several factors:

- Character of marginality and purpose of delimitation of marginal regions (social aspects, economical aspects, multidimensional marginality, etc.)
- Selection of appropriate indicators and their relevance for research
- Type of indicators (economic, social, environmental, geometric)
- Frequency of used indicators
- Hierarchic level of observation units
- Methodology

RESULT AND DISCUSSION

Analyzing above mentioned features in 13 selected studies (6 written by Czech authors, 7 by Slovak authors) we found out that in approaches of identification of marginal /peripheral regions great variety of indicators is used, while covering different aspects of marginality. Altogether, 52 different indicators were used, almost equally distributed among Slovak (34) and Czech studies (32), while 14 indicators are in these studies in common. According to their character we can distinguish economic, social, environmental and geometric indicators, and it is the first two groups that were used the most (Tab 1).

Tab. 1 Summary statistics of the indicators of marginality and peripherality in Slovak and Czech literature (based on analysis of 13 studies)

	Indicators (abs. number)		
	Total	Czech studies	Slovak studies
Indicators (sum)	66 (52*)	32	34
Out of the total: social	33	18	15
economic	26	12	14
environmental	3	1	2
geometric	4	1	3
Frequency of use (2 and more)	22**	14	14
Average number of indicators in one study	8.46	8.83	8.14
Identical indicators		14	

* 14 identical indicators in Czech and Slovak studies

** 6 identical indicators in Czech and Slovak studies

When looking closer into these groups, the most often these indicators tackles issue of labor market and employment (13), questions related to housing and quality of housing (11), human resources (educational level (3), age groups structure (8), population movement (5), to a smaller extent they focus on accessibility (mainly transport) (3) and natural or environmental potential and qualities of the place (4). It is very interesting to see how often are these indicators used among the authors and the most important is to see which of them are being used the most often (Figure 1). Number of indicators varies from one author to another, depends on the character of marginality (e.g. social marginality, transport marginality, agricultural marginality, etc.). Thus, we can find studies, where only one indicator is used (synthetic value) as for instance in Horňák (2006), and on the other hand there are those using wide scope of indicators as we can find in Musil-Müller (2008) and Šebová (2013), where 16 indicators were used.

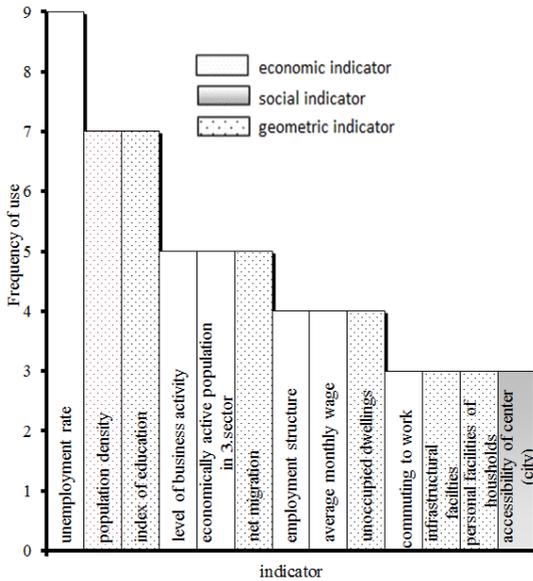


Figure 1 The most commonly used indicators of marginality and peripherality in Slovak and Czech literature (based on analysis of 13 studies)

Diversity among analysed studies derives not only from ambiguous understanding of terminology (marginality, peripherality), but especially from:

- *the purpose of each research* – Transport marginality (Hornák, 2006), social marginality (Falt'an-Gajdoš-Pašiak, 1995; Gajdoš, 2005), marginality in terms of agricultural land use (Spišiak, 2000), complex marginality (Šebová, 2013), etc.
- *the specific data base* – Data are a cornerstone of every single research and their availability, character as well as quantity influences research itself. Lack of statistical information on lower hierarchic levels or missing information at all, often limits complex research as it is in the case of delimitation of marginal areas. Many authors therefore focus on case studies, where they can complete missing information by their own empirical research in the specific area.
- *the hierarchic level of territorial units* – In the Slovak research papers that were object of our study, regional or microregional (districts, subregional entities or urban systems) as well as local level (municipalities) are about equally represented. Czech authors prefer rather regional and microregional level. However, we consider local level to be the most appropriate for the research of marginal areas.
- *the choice of statistical methods* – Great variety of statistical methods were used in analysed studies - explorative methods of basic statistical description (method of order, average, median in Pileček, 2005), multicriterial statistical methods (component analysis in Marada, 2001; Jeřábek-Dokoupil-Havlíček, 2004), etc. In general we can see prevailing use of quantitative methods rather than qualitative. However, these are often limited by insufficient

amount of information. It is therefore essential, as many authors emphasise, to enrich statistical data with information obtained throughout empirical research – by qualitative methods, e.g. experts interviews, questionnaire survey or mental map creation. It is really data of subjective nature that very often reveal such knowledge that we would not be able to learn using quantitative methods only. Thus, this alternative methods can be considered to be of vital importance when talking about delimitation of marginal areas.

CONCLUSIONS

Rural environment as we know, has began to change significantly under the influence of global economy. Thus many authors began an intensive research within the issue of marginality and peripherality which is very often associated with rural areas. With growing number of these studies, different approaches to identification of marginal areas were developed. In this study we tried to demonstrate this diversity by analysing selected studies within Slovak and Czech geography, which we clarify mostly in terms of methodology. Despite different methodology, final delimitation of marginal regions and their interpretation seems to be similar. This topic should not stay only in theoretical perspective, but should be applied into practice as well. Identification of marginal rural areas enable us to reveal so called “dark side” of rural environment, and thus can be implemented into development plans with focus on these specific, less developed features (e.g. quality of human resources or infrastructure) and which activation needs our attention. This brings us to another possible reflection that might be discussed within rural issue, especially rural development.

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