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## **Conceptualising Social Exclusion in Rural Britain.**

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# **Conceptualising Social Exclusion in Rural Britain.**

## **Abstract**

Most studies of living conditions in rural areas have offered essentially static snapshots. Social exclusion is a multi-dimensional, dynamic concept which emphasises the processes of change through which individuals or groups are excluded from the mainstream of society and their life-chances reduced. This paper considers social exclusion in the context of the principal forces operating on and within rural areas of Britain, including global restructuring and the changing role of the state and supra-national institutions. A framework of four systems of social exclusion and inclusion is proposed, following Reimer (1998), according to the means by which resources and status are allocated in society. This is used to structure a presentation of the results of several recent empirical studies which provide evidence of the processes and system failures lying behind social exclusion in rural Britain. A number of research issues are identified concerning how these processes vary between areas, how they connect to the broader forces operating at macro and meso levels, and how local action is associated with attempts to resist social exclusion.

## **Key Words**

social exclusion, systems of social exclusion and inclusion, rural Britain

## **1 Introduction.**

Rural areas of Europe are subject to major structural changes, both as a result of changes in rural economies and societies themselves and as a consequence of policy reforms. In terms of market and economic forces, the declining importance of agriculture and other primary activities and the growth of the service sector are well known. One key element is the increasingly global penetration of local markets, prompting many social actors to seek new strategies of resistance such as selling the local to the global. There is a general shift to a service-based economy in which the information and knowledge-based industries play an increasing role, bringing both opportunities and threats to rural areas.

Fundamental demographic, social and cultural changes also characterise rural areas of Europe. An ageing of the population is occurring at the same time as economic restructuring, leading to increased dependency ratios, casualisation and part-time working, and less job security. Migration flows are critical in determining rural population levels and, while some areas continue to lose population, in many parts of Europe people are moving into rural areas because of the new values placed on rural space (e.g. clean environment, healthy lifestyles, community life, etc.), as consumption interests displace production interests (EU Commission 1998). The consequences of the imposition of such values on rural societies may be far reaching. Social relations are also changing in other ways with the rise of individualist values and the decline of established institutions.

Policies (especially macroeconomic policies and social policies) also have pervasive impacts upon rural areas. A reform of the CAP was agreed in 1999 and further reforms are now proposed by the Commission in the context of enlargement of the European Union (hereafter EU) and World Trade Organisation negotiations (EU Commission 2002). The EU structural funds were also reformed, becoming focused on fewer rural areas. The new Rural Development Regulation applies to all rural areas, however, as ‘a second pillar of the CAP’ promoting agro-environmental schemes and limited rural development measures. To some extent, a Europeanisation of member states’ rural policies (Shortall and Shucksmith, 1998) may be occurring.

Mernagh and Commins (1992) note that these trends have different implications for differently situated rural areas and that they will have uneven impacts on different social groups. Yet little systematic information exists about the processes of exclusion which operate within rural economies and societies across Europe, still less how these will be modified by the macro-trends listed above and by institutions between the state and the individual. Apart from a few exceptions (Curtin *et al*, 1996; Pfaffenberger and Chassé, 1993; Chassé, 1996; Chapman *et al*, 1998; Lutz *et al*, 1993; Byrne, 1991; Struff, 1992; Mernagh and Commins, 1997; Meert 2000) most studies have tended to focus upon the modelling of impacts in the agricultural sector, to the neglect of the connections between lived experiences and structural changes in the broader rural economy<sup>1</sup>. There has been no comparative survey across EU member states of the experience of living in rural society. Neither do we know enough about the reasons for the differential growth and decline of rural economies, and the scope for policy intervention (although see Bryden *et al*,

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<sup>1</sup> There have also been a plethora of studies of “othering” in rural areas of Britain, focusing on the narrower but related issue of how representational control is exercised (especially by researchers themselves) to marginalise certain voices and experiences (Milbourne 1997; Cloke and Little 1997.)

2001). Further empirical work is necessary to relate explanations of contemporary change to observed processes of social exclusion and to the lives that people lead.

In an attempt to relate 'history' to 'biography' in this way (Mills 1959, Byrne 1999), this paper considers social exclusion in the context of the principal forces operating on and within rural areas of Britain, including globalisation and the changing role of the state. It takes a social integrationist perspective, viewing social inclusion as four overlapping systems through which resources are allocated in society, and proposes a conceptual framework to aid analysis and understanding. It then attempts to ground this framework in empirical work using the results of several recent studies by the authors (Shucksmith *et al*, 1996; Chapman *et al*, 1998; Philip, 2000) which provide evidence of the processes and systemic failures leading to social exclusion in rural Britain.

## **2 What is social exclusion ?**

### *2.1 Poverty, disadvantage and social exclusion*

Poverty was the focus of the EU's Poverty 1 and Poverty 2 programmes, and indeed the Council of Ministers in 1984, following Townsend (1979, 1987), defined 'the poor' as "persons, families and groups of persons whose resources (material, cultural and social) are so limited as to exclude them from the minimum acceptable way of life in the member states in which they live." In contrast, the Poverty 3 programme was concerned with the integration of the "least privileged"

and by the time the programme was actually launched, the focus had shifted to “social exclusion”. According to Room (1994, 233-240), the distinction between poverty and social exclusion represents a three-fold change in perspective: (i) the shift from a focus on income or expenditure to multi-dimensional disadvantage; (ii) the shift from a static account of states of disadvantage to a dynamic analysis of processes; and (iii) the shift from a focus on the individual or household to a recognition of the importance of the local context. The focus of research is now therefore on multi-dimensional, dynamic processes of social exclusion, within the context of specific (case study) local communities.

The rapporteurs of the Poverty 3 programme suggested the distinction between poverty and social exclusion should be considered as a distinction between outcome and process. Berghman (1995, 21) points out that each term could have a double connotation as both process and outcome, and he suggests clarifying matters by using “poverty and deprivation to denote the outcome, ... and impoverishment and social exclusion to refer to the process.” Notwithstanding this, the focus of current research is on dynamic processes, and the identification of “pathways” to exclusion and integration. Berghman argues that this necessitates a research emphasis on social mobility, an important means by which research on social exclusion may be founded more securely on social theory.

## 2.2 *Approaches to social exclusion : integration, poverty or underclass ?*

As Lee and Murie (1999) have noted, “the concept of social exclusion is contested, and there is no one single accepted definition.” Levitas (1999) identifies three competing ways in which the term has been used in policy debates :

- an “**integrationist**” approach in which paid employment is seen as the key integrating force, through earned income, identity, a sense of self-worth, and networks;
- a “**poverty**” approach in which the causes of exclusion are related to low income and a lack of material resources, with redistribution the remedy;
- an “**underclass**” approach in which (the) excluded are viewed as deviants from the moral and cultural norms of society, exhibit a “dependency culture” and are blamed for their own poverty and its reproduction.

These may be summarised as ‘no work’, ‘no money’ and ‘no morals’ respectively. It should be noted that Levitas here is tracing the evolution and appropriation of the term social exclusion, particularly in policy debates about the (British) Labour Government’s Social Exclusion Unit, rather than trying to use the concept to study exclusion itself. For the latter purpose we would argue it is the integrationist approach which offers most promise. However, even this approach may be criticised as unduly narrow, with its emphasis solely on integration through paid employment. As Lee and Murie (1999) observe, households access resources in many other ways than through the labour market. Accordingly, it will be argued in this paper that processes of social exclusion, in both rural and urban areas, extend far beyond the labour market and indeed are multi-dimensional.

### 2.3 *Social inclusion as overlapping spheres of integration*

A broader framework consistent with such an approach has been proposed by Duffy (1995), Kesteloot (1998), and Meert (2000) in which the processes of social exclusion and inclusion are related to overlapping spheres of integration. As suggested by Lee and Murie (1999) these overlapping spheres refer to different ways in which households access resources (for example, through the market and payment for work or through transfer payments and services provided by the state) and through the many reciprocal and other non-market transactions based on family, community and other networks.

This approach echoes that of Commins (1993) who suggested that social exclusion should be defined in terms of the failure of one or more of these four systems:

1. the democratic and legal system, which promotes civic integration;
2. the labour market, which promotes economic integration;
3. the welfare state system, promoting social integration;
4. the family and community system, which promotes interpersonal integration.

One's sense of belonging in society depends on all four systems, Commins argued. Civic integration means being an equal, empowered citizen in a democratic system, with a sense of access to policymakers and centres of political power. Economic integration means having a job, having a valued economic function, and being able to pay your way. Social integration means being able to access the social services provided by the state, without stigma. Interpersonal integration means having family and friends, neighbours and social networks to provide care and

companionship and moral support when these are needed. Distinctions are made between a 'dual society', in which a large proportion are excluded and forced to rely on transfer payments, and an 'active society' in which all enjoy opportunities for participation in all four systems.

#### 2.4 *A proposed framework: systems of exclusion and inclusion*

Reimer (1998) suggested modifications to Commins' proposed set of systems. In a similar approach to Meert (2000), Kesteloot (1998) and Duffy (1995), he argued that it is helpful to distinguish the dimensions of social exclusion according to the different means through which resources are allocated in society. He proposed four systems, representing an advance of those of Kesteloot, Duffy and Commins. They are as follows :

1. Private systems, representing market processes
2. State systems, incorporating authority structures with bureaucratic and legal processes
3. Voluntary systems, encompassing collective action processes
4. Family and friends networks, a system associated with cultural processes

This attempt to view processes of social exclusion and inclusion in terms of a series of overlapping spheres of integration, according to the means through which resources and status are allocated in modern society, has a firm theoretical foundation. As Leisering and Walker (1998, p7) observe, "modernity implies the institutionalisation of the '*individual*', the '*self*' and the '*life course*' as new social entities. In pre-modern times a person belonged entirely to one social

setting: a local community, in which several social functions were fused. In modern times, processes of ‘functional differentiation’ described by Parsons (1966) and Luhmann (1977) and ‘social disembedding’ as depicted by Giddens (1991) have dissociated social relationships from local contexts. In this way the individual has emerged as a separate social unit that must coordinate activities in diverse social spheres that are differentiated by function.” Luhmann, in particular, has developed an analysis of society in terms of overlapping and interacting systems.

This analysis also recalls Marshall’s “hyphenated society” (Marshall, 1981), as well as Polanyi’s seminal work (1944) on household survival strategies in relation to three spheres of economic integration: market exchange; redistribution, based on deference or “associative relations”; and reciprocity. Thus, Polanyi argued that the main form of transaction other than the market is reciprocity based on mutual affection and love, most notably within the family or household<sup>2</sup>. Reimer also relates his suggested four systems to the work of Fiske (1991), who proposed four “elementary forms of human relation”, namely market pricing, authority ranking, equality matching and communal sharing.

The conceptual distinction is now clear. Poverty is an outcome, denoting an inability to share in the everyday lifestyles of the majority because of a lack of resources (often taken to be disposable income). Social exclusion is a multi-dimensional, dynamic concept which refers to a breakdown or malfunctioning of the major societal systems that should guarantee the social integration of the

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<sup>2</sup> Shortall (1999, 32) has pointed out that this often permits exploitation of women in farm families, since such reciprocity exists alongside a very unequal relationship of economic and social power. Indeed, she argues “one of the shortcomings of Polanyi’s concept of reciprocity is its lack of any perspective on power.”

individual or household. It implies a focus less on ‘victims’ and more upon system failures. The term is systemic but also has implications for agency (Byrne 1999).

Room (1994) argues that such recent conceptual shifts open the way towards a redirection of the research agenda away from an atheoretical tradition of counting and comparing ‘the poor’ and instead towards wider issues of social stratification and political order, affording closer links with mainstream sociological analyses of class and social mobility, and discussion of European welfare regimes. This is possible because, as we have seen, very different theoretical paradigms underpin the two concepts of poverty and social exclusion: while the notion of poverty is primarily focused upon **distributional** issues (the lack of resources at the disposal of an individual or household), the notion of social exclusion focuses primarily on **relational** issues (inadequate social participation, lack of social integration, powerlessness).

Accordingly it will be an important part of any future research to develop adequate theoretical accounts of the links between processes of social exclusion and integration occurring in rural Europe and social and economic change at macro, meso and micro scales (Shucksmith and Chapman, 1998). These processes should be analysed in relation to the means by which resources and status are allocated in society, and especially in relation to the exercise of power.

In relation to rural research, the question arises of why we might expect social exclusion to manifest itself in different ways between rural and urban areas. Curtin *et al*, (1996) suggest two reasons for looking specifically at rural poverty. Firstly, they argue that rural areas were distinguished until recently by the dominance of agricultural production, and that the generation

of poverty is therefore different and distinctive in rural areas due to this legacy. Secondly, they point out that rural areas are associated in popular discourse with a distinctive organisation of space, namely sparsity of population and spatial peripherality, and they hypothesise that these may also generate distinctive manifestations of poverty. Beyond these explanations, competing representations of rurality are likely to have important consequences for what forms of rural development are proposed or permitted<sup>3</sup> and for the processes of social exclusion and inclusion which result. Woodward's (1996) argument that rurality and deprivation derive from essentially contradictory discourses is especially apposite here. In Britain at least, and probably in many areas of Europe, this has profoundly influenced not only the processes of social exclusion in rural areas but also the policies which one might have expected to assist those disadvantaged as a result (Shucksmith *et al*, 1997).

### **3 Pathways towards social exclusion in rural Britain**

Exclusion, as we have seen, is a much broader concept than poverty, and social exclusion may not be poverty-based. Nevertheless, poor households are likely to face many forms of exclusion, and so knowledge of rural poverty is an important starting point for any discussion of social exclusion.

A 1980 study of rural deprivation in England (McLaughlin, 1986; Bradley, 1987) and a follow-up study of rural lifestyles in 1990 (Cloke and Milbourne, 1992; Cloke *et al*, 1994, 1995) each found

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<sup>3</sup> Note the operation of the planning system both as a regulatory framework and as a political arena.

around 25% of rural households to be living in or on the margins of poverty<sup>4</sup>. The main demographic groups associated with poverty were elderly people living alone (predominantly elderly widows), and low-paid, manual worker's households. These studies suggested that rural incomes are highly polarised, with a higher proportion of rich as well as poor households than in the country as a whole. The disparity between male and female earnings was also found to be greater than the national average.

In rural areas of Scotland too “a disproportionate number of the poor are elderly, and a disproportionate number of the elderly are poor” (Shucksmith *et al*, 1994 p2). As in England, the other main element of rural poverty derived from the disproportionate number of people in low-paid occupations, notably in agriculture and tourism. Often the self-employed were also found to have low incomes. A third element of rural poverty in Scotland, not found in the English studies, derived from local concentrations of unemployment.

A major finding of the latter research (Shucksmith *et al* 1994; 1996), however, and a problematic aspect of it, was that people's subjective assessment of their poverty or disadvantage was often at odds with the objective definition of low income applied. Almost all looked back to a point in the past when poverty had been much more commonplace and obvious, such that they could not conceivably now be poor. Rather than comparison being made with the lifestyles of the majority, as in Townsend's conception, people compared their situation with lifestyles of the past, when conditions were much harsher. Another reason for this observed disparity between objective and subjective assessments of poverty was that most respondents felt that the benefits of living in a

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<sup>4</sup> Poor households were defined by McLaughlin as being those whose incomes equated to the household's supplementary benefit and households on the margin of poverty were defined as those with an income up to 139% of their supplementary

rural area outweighed the disadvantages. They felt they were “rich in spirit, poor in means”. Many rural residents placed a high value on non-monetary aspects of rural life, although with increasing proximity to an urban centre this diminished. This accords with Cloke *et al*'s findings (1994) in rural England.

While these studies offer useful snapshots of the nature and extent of poverty in different localities in rural Britain, they say little about the processes underlying such poverty, and they remain essentially distributional in their concerns rather than relational. Few have addressed either the ‘pathways’ to social exclusion and integration, the causes of social exclusion, or the ways in which exclusion is subjectively experienced. Were those in poverty in rural areas in 1990 the same people as in 1980? Were a few people experiencing long-term exclusion, indicative of a dual-society, or were many more experiencing short-term, transitory problems? For this reason Shucksmith *et al* (1997) called for research to move beyond “counting the victims” towards researching the dynamic experience of disadvantage and social exclusion in rural areas, and to understand better the processes causing disadvantage in a variety of rural contexts and their uneven impact on different groups and different areas.

### *3.1 Researching the Dynamics of Social Exclusion in Rural Areas*

In principle, it is possible to research the dynamics of social exclusion in rural areas either through the use of longitudinal panel data or through the use of detailed case study research. Each method, quantitative or qualitative, has advantages and disadvantages. By their very nature,

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benefit entitlement.

longitudinal household panel data tends to be divorced from the local context, providing broad national or regional analyses. In depth qualitative studies will be more revealing of differences from one locality to another. In this section, examples of each are reviewed in turn.

*The use of longitudinal household panel data* – Chapman *et al* (1998) were the first to use the British Household Panel Survey (BHPS) to follow individuals in rural Britain<sup>5</sup> each year over five years from 1991. A major objective of the study was to provide a picture of the dynamics of low income in rural areas by comparing the evidence on income mobility and low income from the relatively small rural sample with the non-rural sample.

Overall, the results suggested that not only are proportionately fewer individuals affected by low income in rural areas, but that spells of low income tend to be shorter with the proportion of those who are ‘persistently poor’ significantly less. Nevertheless, a third of individuals in rural areas are likely to have experienced at least one spell of low income (below half mean household income) during the 5 years, and gross income inequalities intensified in both rural and non-rural areas. The low income ‘problem’ is more acute for those over 60 with, not unexpectedly, the degree of persistently low income significantly higher for this group in both rural and non-rural areas. Analysis of overall rural income mobility confirmed that there is a significant amount of mobility within the income distribution in any given year but that most of it is ‘short range’. The analysis also supported the suggestion that migration is the principal engine for the progressive gentrification of the countryside, in that this increases the proportion of the rural population in the

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<sup>5</sup> Of the 7,164 people included in this national random sample (after attrition etc.), 968 always lived in rural areas (defined by postcode sector as outside settlements of 3,000 or more), 5892 always lived in non-rural areas, and 304 moved between rural and non-rural addresses during the period.

higher income classes and decreases those in the lower income classes - i.e. richer people are moving in and poorer people are moving out of rural areas. While the probability of escaping from a low income is similar for the rural and non-rural sub-samples, those in rural areas are less at risk of falling back into poverty than those resident in non-rural areas.

The study also examined differences in work and opportunity between rural and non-rural areas, focusing on the dynamics of employment and particularly the related issues of low pay and unemployment. The most striking finding was that the incidence of persistent unemployment was less but the incidence of persistent low pay was significantly greater for rural than for non-rural areas. The relatively low escape rate from low pay for individuals employed in small rural workplaces, combined with the dominance of microbusinesses in rural areas, suggests that the lack of opportunity to move to work for larger employers may be an important explanatory factor. Over the period 1991-1995, unemployment rates in non-rural areas fell much more than those in rural areas, eliminating any differential.

Shortly after Chapman *et al's* (1998) report was published, Kempson *et al* (1998) also undertook analysis of longitudinal panel data to explore its potential for researching social exclusion in rural areas. Kempson *et al's* preliminary explorations of income disadvantage, using just two waves of the BHPS, found a broadly similar picture in rural and non-rural populations (except in relation to the 'triggers' to income disadvantage). Their findings suggest that there may be value in further research focusing either on elderly people living in rural areas or on rural areas containing large concentrations of elderly people.

*Qualitative, case study research* - The studies mentioned above were only preliminary analyses of the longitudinal data available, and much more may be gained from longitudinal studies of households in their particular localities, where the local context can properly be taken into account in the analysis. A number of such studies have recently produced their final reports, as part of the Joseph Rowntree Foundation's Action in Rural Areas programme, which extended to many contrasting rural areas of Britain (see Shucksmith, 2000).

Such studies illuminated the dynamic pathways of individuals and their connection to wider forces. For example, Rugg and Jones (1999) followed a sample of young people over a crucial period in their transition to adulthood while also gathering life history information from them. They identified a number of ideal-typical youth trajectories in rural North Yorkshire, with opportunities structured primarily by higher education, social class and level of family support. What is most striking, though, is that without exception all the respondents, regardless of educational attainment, had to leave the rural area when they wished to form an independent household because of the lack of any affordable housing options. Subsequent research in seven countries of the EU (Jentsch and Shucksmith 2002) has also sought to study the transitions of young people in rural areas to adult employment, finding considerable variation from one area to another.

Such recent findings<sup>6</sup>, both qualitative and quantitative, have advanced our understanding of both the experience of social inclusion and exclusion in rural areas, and of many of the underlying

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<sup>6</sup> These findings are discussed at much greater length in Shucksmith (2000) and in the individual reports listed in this overview report of the Action in Rural Areas programme.

processes. They also suggest some very clear policy messages. The next section seeks to place such insights more systematically within the framework proposed earlier in this paper.

#### **4 Processes of social exclusion in rural areas.**

As discussed above, social exclusion is conceptualised as an inherently dynamic process, involving the interaction of a range of social, economic, political and legal systems. Indeed, social exclusion may be regarded as a breakdown or malfunctioning of the major societal systems that should guarantee the integration of individuals and households within their communities. As noted above, Reimer identified four interrelated systems by which resources, services and information are allocated. Each system is characterised by a fundamentally different means of allocation. The four systems are outlined in Figure 1.

Incorporating the processes within each system that Reimer identified as being particularly pertinent to rural areas, this section of the paper will demonstrate how these four systems of exclusion (market, state, associative and reciprocal) have particular characteristics and different implications for inclusion and exclusion in rural areas of Britain. Of necessity, this draws on previous research to illustrate the potential insights to be gained from using this framework. Future empirical research from this standpoint would facilitate further evaluation of the usefulness of this systems approach to understanding the dynamics of social exclusion in rural communities, as well as extending the analysis to other rural areas of Europe..

Preferred position of Figure One

#### *4.1 Private systems*

Private systems are highly sensitive to market processes. Urban and rural communities in Europe operate within the same EU single market, and are linked to the global economy. However, private market systems operate to create exclusion differently in urban and rural areas. In terms of transaction costs, people living in rural areas tend to face higher costs when accessing day to day services. Economies of scale operate within the non-rural private economy where considerable market choice creates competition. Choice within market systems is often more limited within rural regions and limited access to other markets, competing or complimentary, has implications in terms of labour market opportunities and the competitiveness of the market.

Individuals whose personal financial circumstances are constrained cannot exploit the market fully: they are likely to experience exclusion. In urban areas private systems are most likely to exclude those who do not have the skills to participate within the labour market. In rural areas the local market is much smaller, restricting opportunities and choice. Limited mobility is an overarching problem, limiting full participation in the private system, even if individuals possess relevant skills. Links between the private system and exclusion in rural areas will be illustrated with reference to labour markets, housing markets, markets in consumer goods and product markets in the British context.

*Labour markets - The Disadvantage in Rural Scotland* respondents (Shucksmith *et al*, 1994; 1996) viewed labour and housing market issues as critical problems within rural communities. Respondents made it clear that there were very limited employment opportunities in many rural areas: 65% felt that there was a lack of *any* opportunity for work. These problems were seen as most severe in the remotest island and mainland localities, but were still important even in an area within commuting distance of Glasgow. Young people and women tended to have the fewest options in terms of employment, and generally jobs were low-paid and insecure. Lack of employment choice and career options for young people was perceived to be the most serious problem facing rural communities. In particular, graduate employment options were seen as non-existent in some areas, and parents accepted that by encouraging their children to do well at school and to attend University they were in fact educating their children 'out' of the area. This is a recurring theme in studies of young people in rural Scotland (c.f. Jones and Jamieson 1997) and elsewhere in Europe (Jentsch and Shucksmith 2002). The majority of women accepted that given the better pay and greater security accorded to male employment in rural areas, women's aspirations, by necessity, had to take second place to their male partners or male peer group. These impediments to economic integration were closely bound up with transport and child-care services, both of which were deficient. Research in south-west Scotland (Philip 2000) produced similar findings. Again limited employment opportunities were particularly problematic for young people. Low wages caused concern, as did the limited range of employment opportunities on offer and the limited opportunities for career development available to local people. Distance from alternative labour markets further compounds employment-related problems, particularly in remote rural areas, as commuting to neighbouring employment centres is often not feasible.

*Housing markets* - Cloke *et al* (1994) found a juxtaposition of low- and high- value housing and a predominance of owner-occupation in most of their study areas. This is consistent with the survey by the DoE in 1991 which found that 74.4% of houses in rural areas were owner-occupied, compared to 63.7% of houses in urban areas, and it is likely that this disparity will have widened since then due to ongoing council house sales. In Scotland, this was also a conclusion of the series of rural housing market studies commissioned by Scottish Homes in 1990 (see Kirk and Shucksmith 1990) and of a review of more recent evidence by Shucksmith *et al* (1996). The relative importance of the private market in allocating houses in rural Britain is one legacy of difference between rural and non-rural areas, and its concomitant, the lack of social housing, has been widely identified as the most important issue facing rural communities (see Shucksmith *et al*, 1996; Peida, 1998). Housing markets, rather than labour markets, have become the principal determinant of social change in many parts of rural Britain (Shucksmith, 1990a).

Housing markets in rural areas are not 'free-markets'. On the demand side, the growing number of single person households and the increase in the number of elderly people have heightened the demand for housing across the UK. In many rural areas these housing demands are augmented by the increased purchase of retirement and holiday homes, as well as by commuters seeking the perceived benefits of a rural lifestyle. It is on the supply-side, though, that regulation has the greatest impact, through the constraints on supply imposed by the planning system and by policies of urban containment (Hall, 1974; Newby, 1985; Shucksmith, 1990). Policy guidance has been reinforced by the desire of some rural residents (often the most articulate and powerful) to preserve the countryside in its existing state, so that planning has become a political arena through which the interests of the most powerful are imposed on the weak. As Newby noted in

1985, before the term social exclusion had been coined, “As prices inexorably rise, so the population which actually achieves its goal of a house in the country becomes more socially selective. Planning controls have therefore become - in effect if not in intent - instruments of social exclusivity.” (p.187) Housing market processes operate in different ways in other rural areas of Europe, often with less severe supply-side constraints and sometimes less demand, so producing diverse patterns of exclusion and inclusion (Gallent, Shucksmith and Tewdwr-Jones 2002). Thissen et al (2001), for example, show how competition for housing in rural Flanders even in the context of a weak planning system generates social exclusion for young people.

*Markets in consumer goods* - Private systems in rural areas are also characterised by limited choice in terms of consumer goods, whether they be luxuries or daily necessities. Philip (2000) noted concern about the expense and lack of choice associated with shopping locally<sup>7</sup>. The distances that must be traversed in order to access low order services, let alone alternative markets, have both time and financial costs attached. An overarching problem associated with the operation of private systems in rural areas is limited mobility. The importance, and cost, of having one’s own car has been stressed repeatedly (*c.f.* Farrington *et al*, 1998). Limited mobility limits access to consumer goods and services as well as constraining access to employment opportunities, especially where public transport is deficient.

*Product markets* - It is apparent that a major source of social exclusion has been changes in product markets, not only from (urban) deindustrialisation, but also in agriculture, forestry and fishing. This may be expected to continue as globalisation proceeds. Global restructuring has

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<sup>7</sup> MacKay Consultants’ Rural Scotland Price Survey, produced twice a year for Highlands and Islands Enterprise, indicates that overall costs for goods and services are lower in urban areas than they are across much of rural Scotland.

been characterised by competition and increased mobility, especially of financial capital and of information (Bryden, 1998). The most common tactical response by local areas to globalisation has been to “sell the local to the global” (for example, Peck, 1994) through local strategies which compete for inward (mobile) investment. However, as Bryden (1998) argues, mobile resources can be elusive and are an unstable basis upon which to build a development strategy. The competitive advantage of rural areas, practitioners have concluded, is based upon fixed, location specific resources which offer greater protection from competition. The characteristics of less mobile resources (Bryden (1998) suggests these fall under the headings of social capital, cultural capital, environmental capital, and local knowledge), are largely unresearched in the context of rural Scotland but are crucially important to the continued economic success of many rural communities. This point is also made by the European Commission (1998).

#### 4.2 *State (Public) Systems*

Inclusion / exclusion may, according to Reimer, also be the result of political and legal processes. In rural areas of Britain, as has often been noted, the local state has tended to adopt a minimalist role, reflecting dominant conservative ideologies. This has left a rural legacy including a lack of council housing, poorer infrastructure, and more paternalistic relations within the political domain. On the other hand, national states and the EU have intervened strongly in relation to agriculture.

Although welfare legislation applies nation-wide there are particular problems associated with the provision of public services in rural areas, mostly related to population sparsity and the dispersed nature of the population. Power relationships must also be considered. The majority of the British population are urbanites and the political power base of the country is urban. To ensure that the objectives of state services for all are realised the problems of providing such services in rural areas must be recognised and accommodated. Access to services and the level of service provision are both 'state systems' issues of particular importance to rural communities.

*Access to services* - The distances involved within rural areas inevitably lead to some services, in particular specialised services, being provided at a greater distance from many rural communities than would be the case in urban areas. Those for whom accessing state services is difficult, those for whom exclusion is more of a risk, such as people with disabilities, women, children and older people, often have limited access to public services because of limited personal mobility. For example, attending hospital may require a long journey. In rural Scotland a return journey of 150 miles would not be unusual. Keeping a hospital appointment can entail considerable effort in terms of time and planning. Within urban society most members of the community have reasonable access to a broad range of social services. The distances that must be travelled to access these services are often small, therefore mobility disadvantages are not insurmountable. These are familiar sources of exclusion in many rural areas of Europe, and particularly in the northern periphery (see the European Spatial Development Perspective).

*Housing allocation and provision* - Housing markets contain an aspect of state systems whose operational processes warrant an exploration in rural areas. The Disadvantage in Rural Scotland

research (Shucksmith *et al* 1994; 1996) recorded households in the study who spoke about the overemphasis on owner occupation in their area and the concomitant lack of housing to rent, especially public housing. There is thus a lack of choice within rural housing markets in Britain, particularly for those who do not have the financial means to compete effectively within the private sector. For these households and individuals, the allocation of houses through the state and voluntary sectors is crucial to their chances of finding an affordable home. Analysis of council allocations and waiting lists in rural Scotland (Shucksmith, 1990) has identified those most favoured by the application of needs-based allocation criteria to be families with children and those most likely to be excluded were young, single people, young couples, and to a lesser extent older people because of the shortage of small houses owned by rural councils.

As reported by Shucksmith *et al* (1996) young families and single person households were frequently seen as being groups with the most restricted housing choice in rural areas. As a consequence of high uptake rates of the statutory rights of tenants to purchase their public sector homes in many rural areas (another process within the state system) there has been a considerable reduction in the number of public housing units available. This compounds problems for those who do not have the financial means to enter the private housing market. Taken together with the pressures upon some rural housing markets from new groups, whether they be commuters, retirement buyers or holidaymakers, whose actions are perceived to have inflated house prices and contributed towards housing shortages, constraints on social housing provision in rural areas are a considerable contributing factor to social exclusion, and indeed towards spatial exclusion (see also Meert 2001 for evidence of this in Belgium)..

*Managerialism, Paternalism and Clientalism* - This discussion of the importance of allocative processes to social exclusion raises the possibility that managerialism (Pahl, 1975) and the study of gatekeepers and their role might be revisited as a way of analysing these aspects of social exclusion. Provided that the broader structural forces are not neglected, such studies of gatekeeping and needs-based allocations might be helpful. Relating to this is the role of local councillors in rural authorities, who may be seen as operating in a more paternalistic or clientalistic manner than elsewhere. Drawing on the work of Newton (1976) in Birmingham on the role orientations of councillors, Shucksmith *et al*, (1993) studied councillors in two rural areas of Scotland, and found that few councillors saw their major role being one of policy formulation and implementation. Instead they tended to place most emphasis on their roles as local representatives and as articulators of the interests of those constituents who contacted them. Inevitably, these were mainly the more articulate and powerful, again reinforcing processes of social exclusion and the exercise of power in the interests of the already powerful.

Support offered by the welfare state is available regardless of location. However, it has been noted that in rural Scotland the welfare system is failing to reach potential recipients and that the take-up of benefits is low. Access to benefits advice, mostly available in urban centres, creates problems. A respondent-identified characteristic of rural communities highlighted in the Disadvantage in Rural Scotland work was an unwillingness to seek official help in times of difficulty, with people relying instead upon family and community networks. The anonymity of urban society reduces the risk of benefit recipients feeling stigmatised or labelled. Such anonymity can rarely be realised in rural communities. Coupled with a tendency for poverty and deprivation to be denied there is thus a real risk that individuals suffer in silence and fall through

the welfare safety net. Clearly this may differ from one local culture to another throughout Europe.

*Participation and democratisation* - Reimer also conceived state systems as incorporating processes which ensure that individuals can participate in the political process. In rural areas there are a number of issues that may limit integration within the democratic, political process. Exploiting their statutory rights, such as attending area committee or local council meetings, or being represented at planning inquiries, may be difficult for the rural public because of the time and cost involved in travelling (see O'Hara 1999 for Irish evidence). Further obstacles to involvement in local representation and / or politics identified in the Disadvantage in Rural Scotland research ranged from cost, lack of information and lack of motivation, to feelings of inadequacy and 'inauthenticity', and other cultural barriers. Jentsch and Shucksmith (2002) report that young people in rural areas of Europe were rarely able to participate meaningfully.

A problem in terms of political representation is that there may be considerable distances between the site of local political power and the delivery point of services. For example, both Inverness and Dumfries are the administrative centres of local government units that cover very large geographical areas. In terms of civic integration, interviewees in the Disadvantage in Rural Scotland research spoke consistently about a huge gap between people and policy makers. It was universally felt that those most likely to have access to power were either the middle class members of the community, or those with life-long 'local' connections. In the remoter communities a sense of powerlessness was universal, especially in relation to dramatic social changes over which people felt they had no control. Decisions were seen as having been made at

a distance with little knowledge of, or concern for, the local people and the area. A lack of unionised labour in comparison with urban areas is another means by which the political representation of rural areas may be restricted.

*Agriculture* –Agricultural markets in Europe are highly regulated by the EU, which has also offered a vast array of subsidies and incentives to farmers to modernise and to encourage production, dominating the EU budget. More recently a small part of the budget has been directed towards agri-environmental schemes and rural development, through the accompanying measures to the 1992 reforms of the CAP and the Rural Development Regulation. These interventions in themselves have been sources of exclusion, favouring larger, capital-rich producers at the expense of smaller farm businesses, and encouraging market imbalances. The uneven effects on farm household incomes have been studied in Ireland by Frawley et al (2000) and in Belgium by Van Hecke (2001). The EU Commission’s (2002) proposals for additional modulation of payments to farmers, and for decoupling of support from production, will clearly affect farmers unevenly.

#### 4.3 *Voluntary Systems*

One of the reasons why local context is important to the operation of processes of inclusion and exclusion is because “the vulnerability of an individual or household to social exclusion depends in part on the local community resources on which that individual or household can draw. Deprivation is caused not only by a lack of personal resources but also by insufficient or

unsatisfactory community facilities ... No less important are local traditions of mutual aid, self-help organisations and other elements of development potential.” (Room, 1995). Reimer suggests that the voluntary system is the one system that compensates for exclusion from state and from family support networks.

Participation in voluntary associations is often higher in small towns and rural areas than it is in larger urban centres. Rural communities are often assumed to have retained *gemeinschaft* qualities (Tonnie, 1957) and a culture of self-help. However, as rural communities have become increasingly influenced by urban society and, importantly, as female participation rates in the paid labour market have increased over recent years in rural areas, fewer volunteers are available. Prevailing political ideology now encourages public-private partnerships for the provision of welfare services. The voluntary, or third, sector is thought to have an important role to play in this new way of delivering services. Thus the responsibilities directed towards the voluntary sector have increased. Coupled with ‘volunteer burnout’, which can be a particular problem in small communities where people feel that they must volunteer for community activities, any reduction in potential volunteers can further disadvantage the client groups, namely the elderly, children and the poor, who are most often the recipients of voluntary welfare.

*Gender and Volunteering* - Most rural communities have a long standing tradition of voluntary service across a wide range of activities. Although both men and women have been, and still are active in the voluntary sector, they volunteer in different ways and in different numbers. Observation of gender roles in community fund-raising (Philip, 2000) showed that more females than males were volunteers at the events and that women appeared to be ‘running the show’.

Although all age groups were represented in the activities observed, volunteers were predominantly middle-aged or older.

Knowledge of the relationships between gender and the voluntary systems that operate in rural areas, and understanding their importance in promoting social inclusion, is limited. There are, however, two related reasons that help to explain the gender division and its relevance to the changing nature of voluntary participation in rural society. The first is related to the changing economic position of women in rural areas. Greater numbers of women than before are participating in the paid labour market within the rural economy, whether it be in a part-time, a full-time or a self employed category. Economic necessity dictates this, despite female paid employment outwith the home being contrary to many cultural dictates. For example, rural women, especially women with school-age children can be viewed as abdicating their role if they undertake paid employment outwith the home (Little and Austin, 1996). The consequence for the voluntary sector, which has traditionally relied very heavily upon female labour, is that more and more women do not have the time to give to as broad a range of voluntary activities as they did previously. This does not mean that the willingness to participate has declined, it is simply a logistical impossibility for a woman to hold down a job, look after home and family and be an active volunteer. The second problem is one of age. As so many volunteers are in the third age there is a real concern that when they are no longer able to participate in voluntary activities to the extent that they currently do there will not be sufficient younger volunteers to follow them. As volunteer services are relied upon more and more to provide or support state services this declining pool of volunteer labour cannot be overlooked. There is also an important sense in which participation in such volunteer work builds capacity not only for the community but for

individuals (typically women) themselves, so helping to empower them in ways quite distinct from wage employment. Again, this individual and community benefit may be lost if volunteers become scarce.

*Housing associations* - Another aspect of the voluntary system is the transfer of certain state responsibilities to the third sector, such as, for example, the growth of housing associations to replace the local state as the primary provider of social housing in rural areas. In many cases, voluntary organisations who assume such responsibilities become increasingly dependent upon the state for funding, and may become closely regulated by central state agencies as a condition of funding. One result of this is that they become more and more like state agencies themselves, adopting the discourse of business plans, efficiency gains, and the like. This has certainly happened to housing associations (Shucksmith and Watkins, 1990) whose central aim of meeting housing needs (especially special needs) has sat uneasily at times beside the priorities of their funding agencies, particularly over the level of rents to be charged and the balance between the affordable rented programme and building for low-cost home ownership.

*Community development* - Endogenous rural development is in vogue. Recent political statements have all endorsed 'bottom-up' development and the empowerment of rural 'communities'. In practice, this tends to rely on community development approaches which include the voluntary sector in area-based partnerships (Shortall and Shucksmith, 1998), placing further demands on volunteers. One might expect such an approach to allow a more effective identification of local needs, targeting of resources to those most in need, and the use of innovative measures to widen participation in local development. Unfortunately, the experience

of community development approaches in most countries has been that power is redistributed principally towards already powerful groups and individuals, with local notables tending to dominate the process of development (Curtin and Varley, 1991; Shortall and Shucksmith 1998). Often this is because of a failure to consider systems of governance and the dimension of power (Wright, 1990). There is a danger, then, that the very community development programmes intended to address social exclusion may themselves be exclusionary and exacerbate inequalities. Groups involved in endogenous rural development often have very close relationships with the local state and the European Commission, and this may colour the logic for their activities and of their allocation of resources and opportunities. Moreover the very notion of community development may be hard to reconcile with the nature of social exclusion in rural areas, where the excluded 'communities of interest' are dispersed and hidden across many 'communities of place'. A priority for both research and policy must be to investigate how such approaches might be adapted to empower excluded groups within rural societies, if this is possible.

#### *4.4 Family and Friendship System*

Family and friendship systems take many forms. They include support networks, systems associated with migration and social change and personal networks, as illustrated below.

*Support networks* - Friendship and kinship supports have long been acknowledged as important anchors for individuals during times when personal circumstances are strained, (for example, Kempson *et al*, 1998). The support offered may range from simply having someone to share

problems with to having people from whom small loans may be negotiated or from whom assistance in kind may be obtained. Both financial and social / psychological support are involved. Such systems rely upon reciprocity. Reimer suggests that in rural areas mobility restrictions, distances, and a falling birth rate make it difficult to maintain the communication and the reciprocity upon which family and friendship systems are based. The elderly are particularly vulnerable as the extended families of a few generations ago who took care of older family members are no longer as prevalent as they once were. Support in kind or of a financial nature is often obtained from friends and family, particularly important if there is a reluctance upon the part of individuals to avail themselves of the welfare benefits they are entitled to. If, as Reimer suggests, this informal system is increasingly under pressure there are serious implications for the welfare of vulnerable groups across rural areas.

*Migration and social change* - Demographic change across rural areas has influenced family and friends networks within rural communities. Many incomers arrived in rural areas during the mid to late 1970s, often couples who had taken early retirement and were moving to their rural idyll. These incomers are now within the older age group of their community and frequently they do not have a large network of family and friends in the vicinity to draw upon in times of difficulty. Their own families may live some distance away. Social isolation is a particular problem if one partner dies leaving the surviving partner alone in a community they are only loosely integrated within.

Incomers to rural communities are frequently accused of taking over local affairs and crowding local people out of social networks. However it has been shown (Shucksmith *et al*, 1996; Findlay

*et al.*, 1999) that a considerable number of incomers to rural communities do not want to be seen as interfering. As a result, they limit their involvement within local activities, with long term implications for the continued vitality of the voluntary sector. Social isolation can therefore be a problem for incomers, regardless of their age. For example, young families do not have family networks in the locality to draw upon. Family based activities, such as grandparents baby-sitting, cannot be taken for granted, curtailing the social lives of one or both partners until the incoming family becomes established within their new community.

*Personal Networks* – Recently completed research for the Joseph Rowntree Foundation Action in Rural Areas programme (see Shucksmith, 2000 for a summary) suggests that the strong personal networks of rural communities may be both a positive and negative force, of considerable importance for social inclusion and exclusion. For example, employers seem to prefer to recruit by word of mouth because employees then come with not only a built-in reference but also with built-in censure from peers which ensures their good behaviour and reliability. This advantages those from the locality who are perceived as good workers, but presents barriers to those moving from outside, or those who have transgressed in some way within small communities. In a small rural community, an individual is ‘known’ without any interview, and may not be allowed even one mistake. This aspect of rural life, demonstrating the importance of personal networks, is likely to extend into many other domains of people’s lives, beyond the search for employment, both as a source of strength and solidarity for some and as a source of exclusion for others. Such continuing significance of social networks was found in rural areas of all 7 EU countries considered in Jenstch and Shucksmith (2002).

The four-fold framework presented in this paper represents an attempt to deconstruct the constituent elements of social exclusion. Developing a clearer understanding of the individual elements of social exclusion makes it easier to understand how the processes that create social exclusion operate across urban and rural space. However, as hinted above, individual systems, or specific components of social exclusion do not operate in isolation. This paper can only take the debate so far. It is essential that the linkages between the different systems presented in our four-fold framework are explored. For example, the state plays an important mediating role within voluntary systems. As the third sector increases its involvement with service delivery the nature of that relationship will undoubtedly change. As increasing emphasis is placed upon bottom-up, endogenous approaches to development, particularly within rural communities and regardless of evidence to suggest that this may not be the most appropriate mechanism for promoting social inclusion (Williams et al. 2002), the exact nature of state, market and voluntary relationships and networks need to be understood. The challenge for future research is thus to plug the gaps in our understanding of the discrete elements of the framework *and* to interrogate the links between the market, the state, voluntary and family systems.

## **5 Conclusions**

The evidence reviewed in this paper demonstrates that social exclusion is as much a problem for rural communities as it is for the urban communities whose problems tend to receive more attention, from politicians, the media and from the public at large. It has shown that there is an expanding body of detailed research relating to rural disadvantage and exclusion, and that this research has investigated both people's experience of disadvantage in rural Britain and, to

a lesser extent, the structural forces which operate within and upon rural societies and economies. The impact of these forces are variable, affecting different rural people living in different rural communities in a variety of ways.

The paper has also proposed and illustrated a framework for conceptualising systems of social exclusion. Reimer's fourfold system of social exclusion offers a new way of looking at both rural *and* urban processes of social exclusion. This system shares similarities with those suggested earlier by Commins, Duffy and Kesteloot, but rests on a sounder logical and theoretical basis. Findings from research conducted in Scotland and elsewhere have illustrated how state systems, private systems, voluntary systems and systems of family and friends networks contribute to processes of social inclusion and exclusion within rural areas.

The concept of social exclusion is still being developed and theorised. Because the concept is so recent, relatively few empirical studies have been undertaken which seek to connect 'history with biography' from the dynamic, multi-dimensional perspective implied. However, the framework proposed in section 4 offers not only a way of proceeding in future empirical work but also a means of reinterpreting the insights gained from many previous studies and adding a new valency to their findings. Moreover, by focusing on the processes underlying exclusion, rather than enumerating those who are excluded, this approach is more likely to suggest ways of preventing exclusion.

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