

## Thematic villages as the example of neo-endogenous local development in rural areas

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**Abstract:** This paper is focused on a set of activities undertaken by the local community of peripherally located Polish village and their various cultural, economic and landscape effects. The selected village of Masłomęcz (Lubelskie Voivodeship) is one of over 50 active thematic villages in Poland and well presents the problem of post-war settlement of people from various parts of the country and the long process of their adjustment to the new living environment. The paper is based on quantitative and qualitative data gathered both infield (observation, individual in-depth interviews, focus group, research walk) and along the desk research (the study of literature, documents on local development strategies). The multithreaded analysis in a local scale enabled to present the anatomy of undertaken activities in the scope of the Theory of Change framework. Thematic village of Goths in Masłomęcz presented as the example of neo-endogenous local development in rural areas of Poland is one of the 33 case studies analyzed along the Horizon 2020 Framework RELOCAL Project.

**Keywords:** Thematic Village, local development, rural areas, Theory of Change

### Introduction

In Poland, just like in other countries, rural areas are in the time of intensive transitions. Since the beginning of the market economy in the 1990s, we observe the dynamic emergence of a multifunctional rural regime which influences new non-productive functions in local economies and new lifestyles reflected in the rural landscape. The parallel process within these transformations is the empowerment of local communities and thus reinforcement of social and territorial identity. However, it has to be stressed that these are complicated processes, difficult in view of the economic crisis of that period, bad living conditions, and a number of other phenomena, which turned out to be a serious obstacle for the real social change, based on the recovering of the cultural and territorial identity (Bukraba-Rylska 1992). In some areas, especially on peripheries this transformation was delayed, and became possible only with the acquisition of the structural funds from the EU directed to the strengthening of the social capital and to the broadly understood rural renewal (Czapiewski 2010, Fedyszak-Radziejowska 2010, Jeziorska-Biel and Psyk-Piotrowska 2012, Idziak and Wilczyński 2015).

This paper aims to focus on the idea of thematic villages, which may lead to widely understood rural renewal reflected by redefining local identity and multifunctional development in areas that are

economically and socially impoverished. Activities undertaken along the process of the local development exemplified on the case of Masłomęcz village will be reflected within the Theory of Change approach with the special attention paid on the use of local physical and human resources supported by external incentives, which resulted in a set of cultural, economic, and landscape-related changes.

### **Theoretical background**

The classic formulation of rural development in post-war Europe was an exogenous model that put industrialisation at the centre of development. The key principles, referring to economies of scale and concentration, saw the primary function of rural areas in providing food for the expanding cities. Early models of rural renewal implemented since 1960s in Germany, focused on modernisation of the countryside and increasing the effectiveness of agricultural production, might serve as the example of exogenous approach to local development. By the late 1970s, this model was falling into disrepute. It was criticised as dependent development, reliant on continued subsidies and the policy decisions made by external stakeholders, experts and planners as well as erasing the cultural and environmental differences of rural areas. Among its side effects observed European-wide were: destruction of traditional rural landscape, depopulation and weakening of social capital. In response, a new – endogenous development approach was introduced and the strategies of rural renewal started to focus on social and cultural aspects, sustainable development and thematic villages as a tool in this process. Three fundamental aspects have summarised the endogenous development approach in a rural context: 1) the territorial instead of the sectoral frame, 2) the valorising and exploiting of local physical and human resources, and 3) the focus on “needs, capacities and perspectives of local people” (Ray 2000).

It should be mentioned, that in Poland, similarly to other post-socialist countries, new paradigms for regional and local development appeared with a delay. This was mainly due to ideological factors whose impact weakened along with the transformation and democratization of political and social structures. Within the last 30 years, social sciences in Poland are subject to theoretical and methodological revolution, manifesting primarily in the interest of culture in various contexts and dimensions (Tobiasz-Lis and Wójcik 2014).

Some authors have criticised endogenous development ideas. They argue that any locality will include a mix of exogenous and endogenous forces, and that the local level must interact with the supra-local. The critical point is how to enhance the capacity of local areas to steer these broader processes, resources and actions to their benefit. Recently, an increasing interest in governance dynamics, institutional changing and participation practices has been widely recognised, especially in peripheral and inner areas. Their development and in particular actions that promote local assets and knowledge enhancement, new possibilities of cooperation, new governance structures at different administrative levels, social innovations and participation are considered as the centre of neo-endogenous development and an essential prerequisite for its success (see further: RELOCAL Project applied under Horizon 2020 framework).

In the neo-endogenous rural development two interrelated notions are central, e.g., local resources and local control. The endogenous part refers to development along bottom-up approach that is when the search for possible resources and mechanisms focuses on the local territorial level. The “neo” part

identifies various manifestations of the supra-local and their roles in local development (Ray 2006, 279).

Taking into account the issues listed above, in the case of Masłomęcz village presented in this paper, the process of learning and adapting to the new environment started just after the II World War with the post-war resettlements of people. Based on local historical assets (impact of the territory) and developed thanks to a bottom-up initiative together with external actors' assistance (impact of social capital and relations between local and supra-local), a thematic Goth Village has been established there, which well exemplifies the neo-endogenous concept of local development.

Thematisation of space is a method, widely described to make the “place” known in the broader scale through development of thematic spaces, amusement parks, cultural events and festivals (see: Lengkeek *et al.* 1997, Boruta and Markova 2012, Blichfeldt and Halkier 2014). In a narrow sense, it is focused on selecting a leitmotif for places, events or persons, which become the basis for creating tourist products and serves mainly the marketing purposes (Idziak, 2008, Kłoczko-Gajewska 2013). In a broad sense, it is a model for the neo-endogenous development of a local community providing the basis for acquiring, creating and developing the local identity (Dmochowska-Dudek and Tobiasz-Lis 2017).

### Geographical Context – the village of Masłomęcz

Masłomęcz is a small but very dispersed village of about 400 inhabitants (100 households), located in Eastern Poland in the Lubelskie Voivodeship, not far from Hrubieszów and only 8 km from the boundary with Ukraine (Figure 1). Current local economic activities are very poorly diversified, and the productive structure is still based mainly on farming, and particularly on the cultivation of wheat and sugar beets. A complex set of political, historical and demographic factors marked the contemporary character of Masłomęcz. The former multicultural society, composed of Ruthenians, Poles and Jews have undergone due to the war and numerous post-war processes, changing its structure. One of the most important among these was the resettlement of the Ukrainians from Poland to the Ukrainian Soviet Socialist Republic in the years 1945-1946 and the “Vistula” Operation in 1947, aimed at resettlement of the Ruthenian population to the western and northern regions of Poland, as well as the settlement of the Polish population, repatriated from the USSR in the years 1944-1948 and later on in the 1950s.



Figure 1. Location of Masłomęcz village

In 1977 archaeologists from the Lublin University of Maria Curie-Skłodowska started excavations in Hrubieszów Valley. Between 1977 and 2002, on one of the farming plots in Masłomęcz, they discovered a complex of Goth settlements and cemeteries from the 2nd-4th centuries. Initially distrustful of “strangers”, the residents of village slowly got used to the presence of archaeologists every summer. Their work, at first a new, unprecedented occurrence, became, as time passed, an element of the annual life cycle of the community, until then dictated only by the natural cycles, farming and family activities.

The Goth Village Association was formally established in 2010, although the local community started to be involved in the reconstruction and promotion of the cultural and historical heritage of the region in 2004, in response to the sense of loss they had after the last season of archaeological excavations in 2002. As a consequence of the idea to “bring archaeology and Goths back” to Masłomęcz, a partnership of the residents, NGOs and authorities was set up in the form of a Local Action Group “Better Tomorrow”. Their initial plan was to use the historical and cultural heritage of Goths to develop tourist attractions and services. In 2006, a wooden hut with a straw roof was constructed on a plot of land purchased by the Hrubieszów municipality, serving as a careful reconstruction in the scale of 1:2. It was a Goth hut from the 3rd-4th centuries. This structure constituted the beginning of the Goth Village, an open-air museum which is continuously developed and aims to present examples of everyday activities of ancient Goths along living history lessons, workshops and fests. Between 2007 and 2009, a few projects were realised, focusing on the historical education of the inhabitants of the village and shaping their skills in arts and crafts typical for ancient Goths. In 2009, “the Goth Squad” was established with support from archaeologists, employees of the regional museum in Hrubieszów. Nowadays, the Squad gathers about 30 persons of various age, who, after a series of trainings with professionals, reconstruct with archaeological accuracy the crafts, everyday life rituals and martial arts of the ancient Goths. This local social initiative has become a new symbol of the region.

In 2009 municipality of Hrubieszów received financial support from the Swiss Contribution Fund for the project “From a vision to modern management of the Gothania region”, whose purpose was to create a tourist brand of the entire region and to stimulate the residents in economic terms. Therefore, the Goth Village was accompanied by the establishment of two agri-tourism farms where, in addition to accommodation and a variety of services (bike and ATV rental, horse riding), one can buy and taste local products.

## **Methods**

To design the study focused on thematisation of rural space as the way towards local development, the preliminary desk research of literature and documents have been conducted. The collection of primary data was conducted in the summer and autumn of 2018. In the beginning, a Focus Group activity was organised and conducted in Masłomęcz to gather community members, local stakeholders and experts and observe interactions between these groups of people, 16 in total. Issues addressed during the focus group activity referred to: 1) first idea of the Goth Village in Masłomęcz and its links to previous actions undertaken by the local community; 2) implementation of the idea of the Goth Village in Masłomęcz; 3) the Goth Village Association gathering local community as a tool for the development of the locality; 4) benefits acquired by the local community from the Goth Village; 5) Individuals and groups of people most intensively involved in the Goth Village; 6) formal

procedures in the course of deployment of such projects and their realization; 7) role of the municipality / county in the support for such projects and their realization; 8) role of the Local Action Groups (LAGs) in the support for the projects; 9) notions of “thematic village”; 10) future developmental priorities, improvements, visions and plans; 11) possibility to look for partners in other places (formation of a network).

Following the focus group interview, 9 in-depth individual interviews were carried out. The interviewees were: members of tourism sector (two women running agritourist farms), the local leader, leaders and members of local NGOs (firemen, Farmers’ Wives Association, Goth Village Association), mayor; town councillor responsible for the tourism sector, director of Regional Museum in Hrubieszów. The interviews were designed to take the form of a conversation guided by the researchers (Kvale and Brinkman 2009). Respondents were encouraged to talk freely on the prepared discussion points. These included questions over the mental mapping of the village surroundings as well as about interviewees’ level of involvement in the Goth Village project and a discussion of perceived strengths and weaknesses of undertaken activities. Interviewees were asked to reveal their role and specific contribution to the establishment of the Goth Village in Masłomęcz and features of their character, competences, skills enabling them to stand up to the challenge of this process. They were also encouraged to talk about characteristics and distinctive features of their local community and main changes over time due to the establishment of the Goth Village in Masłomęcz (social, economic, landscape-related). Interviewees also referred to the lessons, learnt on the basis of their experiences, associated with the work on development of the Goth Village, their overall attitude towards their place of living and plans for the future. All the interviews were recorded and transcribed to become the basis for the qualitative content analysis and inductively interpreted later on with reference to person-process-place framework.

Following the focus group activity and individual interviews, along with a research walk, the photographic documentation was collected. Finally, researchers participated in Archeologic Fest – an annual one-day festival which takes place in the Goth Village open-air museum on the last Sunday of July. This primary data was further supplemented with quantitative and qualitative data from secondary sources, including existing statistical data, to contextualise local-level findings (Census data, local chronicles, newspapers, and municipality internet site).

A broad range of collected data on thematisation of Masłomęcz village allowed to present the process of local development in a *Theory of Change (ToC)* framework. The ToC approach (Blamey and MacKenzie 2012, Connell and Kubuisch 1998) is part of a family of approaches to policy design and evaluation which emphasizes the need to clearly specify the intervention logic which underpins any “action”, in order to facilitate subsequent monitoring of the policy process in relation to a logical chain of cause and effect linkages, and evaluation of the changes achieved against the clearly specified goals. The family of approaches also includes *Realistic Evaluation* (Pawson and Tilley 2001, Pawson *et al* 2005), *Logic Models* (Kaplan and Garrett 2005) and *Theory-Based Evaluation* (Stame 2004).

Theory of Change framework, used in this research, aims to highlight the causal pathway between the “action” (intervention) focused on establishing thematic Village of Goths in Masłomęcz and the ultimate goal of local development of this rural settlement. It also considers how aspects of the wider local and national environment (economic, social, governance, policy etc.) affect the intermediate

outcomes which form the links within the causal pathways. This analysis is known as *mechanism mapping (MM)*.

## Results

### *Baseline Theory of Change*

The case study of the active thematic Goth Village in Masłomęcz well illustrates local responses to general challenges of rural areas among which the most important are declining and ageing population, problems with youth retention, limited economic and social opportunities for residents, loss of local services and higher costs of living. Thematisation of rural space of Masłomęcz village is the core process in diversifying local economic base, enhancing the quality of life, and seeking for new functions and roles of this settlement. Rural renewal reflected by multifunctional development, redefining local identity and strong place attachment in the peripherally located area that is economically and socially impoverished, has been outlined as the *long-term goal* of all practices applied in the process of thematisation of rural space in Masłomęcz.

Thematisation of rural space in Masłomęcz as a process leading to local development was possible thanks to parallel activities of:

- local self-government of the Hrubieszów commune which provided Masłomęcz community with a land parcel devoted to the future development of the open-air museum – a tourist attraction presenting cultural heritage of the village connected with the history of ancient Goths, and
- continuing assistance of leaders (archaeologists) who came back to the village after finalizing their archaeological excavations to set opportunities for economic activities related to the Goth Village in Masłomęcz by exploring and developing human and social capital of the village.

These two components of the action can be regarded as the starting points for two causal paths connected with the development of physical space of the village relating to the development of the Goth Village open-air museum - a new central place of the settlement and a tourist site of local and regional scope, setting space for social and economic activities and the growing sense of belonging – both in terms of territorial identity and social trust.

The first of these (on the left of Figure 2) comprises a chain of *intermediate outcomes*, starting from the organisational and financial backing of the Hrubieszów Community in the form of purchasing a land parcel and devoting it for the development of the Goth Village which have led to new employment possibilities, development of local products and services influencing multifunctional development of Masłomęcz. However, this chain of more economically and landscape-related outcomes is also clearly linked with those deriving from leading role of external experts (archaeologists). Innovative exploitation of territorial assets, which, in turn, leads to additional local economic activity and employment results in enhanced demographic sustainability. This set of intermediate outcomes focuses primarily on distributional aspects of spatial justice, because it concerns what may be judged fair access rights to the benefits associated with multifunctional local development of rural area.

The second chain of intermediate outcomes (right hand side of Figure 2) has a stronger procedural element, in that it is about developing human and social capital reflected in growing capabilities of drawing down resources for the benefit of the local community. It is about fair access to local development processes perceived as a pre-condition for long-term development in relation to both, quality of life in Masłomęcz as well as the position and perception of the village in the wider regional and national context.

The linking part of both chains of intermediate outcomes is the Goth Village Association having a specific potential for involving local resources and the whole community into common activities and interests. The Association runs a Goth Village open-air museum, employs staff, engages volunteers, secures funds, carries out educational programmes and becomes highly professional thanks to the engagement of external organisations – the Marie Curie-Skłodowska University of Lublin and Regional Museum in Hrubieszów. Of special significance are, in particular, such undertakings as the development of a Goth Squad uniting residents over common history, interests and activities aimed at popularisation of the historical and cultural heritage of the village.

The causal paths illustrated in Figure 2 only work on the basis of a set of *assumptions (contingencies)* of two types:

- “internal” contingencies which are specific to particular intermediate outcomes, and their links within the causal paths;
- “contextual” contingencies, which are broad underlying assumptions about the geographic, governance, policy, economic and social environment within which the case is found.

The former will be considered in this section, as part of the ToC process whilst the latter are properly considered under the mechanism mapping below. It should be stressed that although internal contingencies are certainly part of the ToC mapping process, mechanism mapping considers the effects of changes in both internal and contextual assumptions.

In the process of interviewing stakeholders there was awareness that some of the internal “contingencies” were factors which facilitated the causal path, whilst others acted as brakes on the process. In the ToC of local development activities undertaken in Masłomęcz village, six internal assumptions may be observed:

A) The basic internal assumption of the local development activities success is the authentic theme (the ancient history of the area) for developing Goth Village open-air museum, understood as a local asset of this particular settlement;

B) The mutual trust of the local community and external actors (archaeologists) enabling to use results of archaeological excavations in the village as the development asset wouldn't be possible without the existing capability of collaboration in the local community. Leaders were needed here as the trigger to start the process, but the local community was ready to work together;

C) Leaders – in Masłomęcz, archaeologists – were the first factor to form a group and to impart adequate dynamics of implementing new ideas which seems to confirm the assumption that expert external assistance is necessary at key stages, especially by providing professional knowledge of markets and marketing. However, professional experts in Masłomęcz (archaeologists) are not perceived as “external” by the local community. After the excavations carried out for 25 years around the village, they have become “ones of us”. As a consequence, they had and still have a strong mandate to represent local community of Masłomęcz and set ideas for the development of the Goth Village open-air museum.

D) The development of the Goth Village open-air museum in Masłomęcz aims to result in new opportunities for economic activities and employment – however the choice of such activities is inevitably constrained by the assets available and the market context – necessitating some kind of smart specialisation approach.

E) The next “internal” contingency is associated with the two-folded connection between demographic stability/growth as well as multifunctional local development and the final goal of rural renewal in general. This link is contingent upon demographic and economic growth, or at least their sustainability being associated with enhanced well-being.

F) Strategic capacity of the Goth Village Association members in defining, reflecting and pursuing their aims to build up a platform for sociocultural activities in Masłomęcz as well as the learning capacity of the association, including its flexibility and adaptability to react effectively when opportunities arise (for instance, through funding programmes).

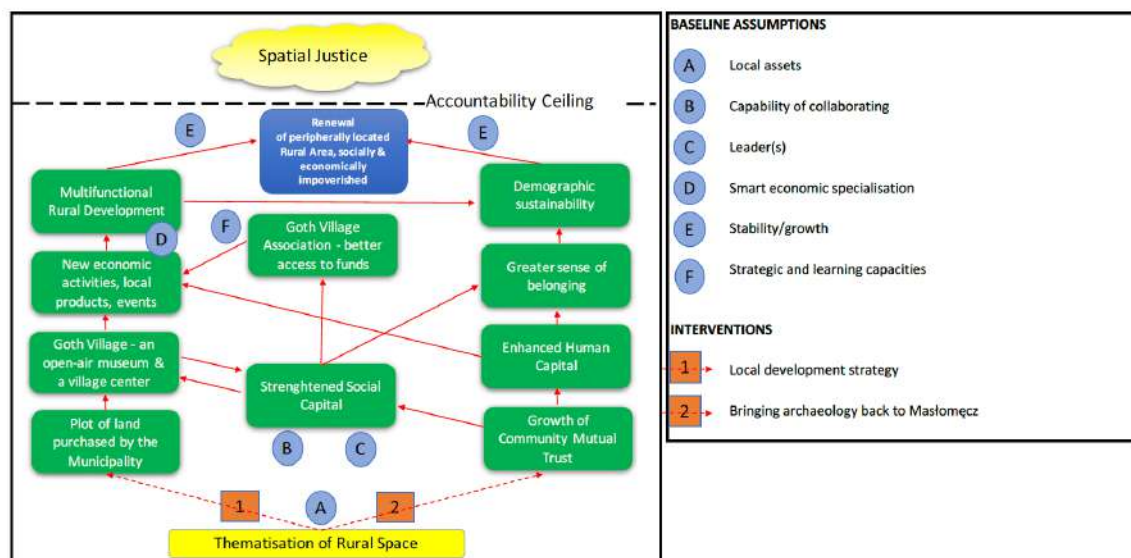


Figure 2. Baseline Theory of Change for the thematisation of rural space in Masłomęcz village, Poland

### Baseline Mechanism Mapping

In essence mechanism mapping considers how a ToC map might adjust if the initial set of assumptions (both internal and external) cease to hold good. This might be associated with the intervention being

applied in a different geographic context or it may be the consequence of contextual political and social changes over time (Figure 3).

Regarding *geographical context*, it should be stressed that Masłomęcz is a small rural settlement located in the remote, easternmost part of Poland, with a complicated post-war history and suffering from outmigration, high unemployment and weak economic infrastructure, especially since the political and economic transitions of the 1990s. However, local assets associated with the natural landscape of Hrubieszów Valley and new features of cultural landscape in the Goth Village open-air museum in Masłomęcz provide the local community with opportunities for economic activity (especially tourist infrastructure) which would not be available (or at least not to the same extent) in other parts of rural areas in Lubelskie voivodeship. The second assumption considered under geographical context is that remoteness places constraints on the choice of economic activities and “styles” of doing business. Essentially entrepreneurs in this kind of environment seek ways to survive without the benefits of agglomeration. One response (particularly for those not so much growth orientated) is to develop a strong relationship with a local customer base.

The *policy context* within which activities undertaken by local community in Masłomęcz village is placed exhibits both continuity and uncertainty. Although there are potentially some big changes on the horizon (changes in EU Cohesion Policies, change of the position of Poland from beneficiary to net payer) the key policy contingency would be the continuity of the support to Eastern peripheries of Poland and rural areas and thus, Masłomęcz community by EU and national development programmes and funds.

Among *societal and market context* the demographic shrinking and ageing which characterises the rural parts of Poland was considered as serious constraint for the activities of Thematisation of rural space in Masłomęcz. Nevertheless, there was some anecdotal evidence of a “turnaround”, driven by younger, economically active residents and in-migrants. New opportunities associated with developing a common tourist offer within a wider region of “Gothania” around the Hrubieszów community might be interpreted as a response to two main inhibitors of the action which were: 1) narrow spatial influence due to peripheral location; 2) seasonal character of the Goth Village open-air museum offer. Further backing of cultural and scientific institutions result in unique offer of the Goth Village keeping it authentic and historically correct.

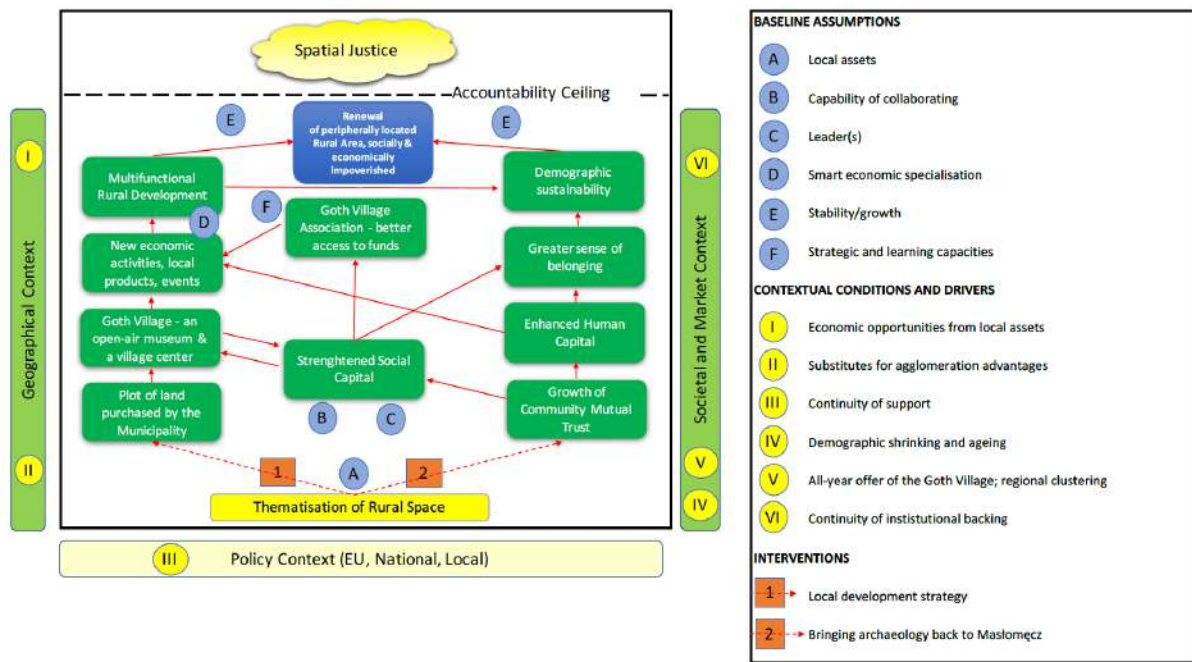


Figure 3. Baseline Mechanism Map for the thematisation of rural space in Masłomęcz village, Poland

## Conclusion

Thematisation of rural space of Masłomęcz as presented in the scope of Theory of Change and mechanism mapping enabled identifying promoters and inhibitors of effectiveness in terms of local development in the remote rural areas of Poland. The main promoters influencing the scope and impact of the thematic Goth Village as a tool for local development of Masłomęcz are:

- an authentic theme for developing the thematic village (ancient history of the area);
- mutual trust of the local community and external actors (archaeologists) enabling the use of the results of archaeological excavations in the village as the development asset;
- strategic capacity of the Goth Village Association members in defining, reflecting and pursuing their aims to build up a platform for sociocultural activities in Masłomęcz;
- learning capacity of the association, including its flexibility and adaptability to react effectively when opportunities arise (for instance, through funding programmes).

Apart from these internal factors, which are related to the set-up and management of the association, further supporting factors play a role:

- organisational and conceptual support of the community of Hrubieszów, Regional Museum in Hrubieszów and Lublin University of Marie Curie-Skłodowska,
- positive influence of EU funding programmes on the strategic development of the association into a sociocultural development actor.

Regarding the main inhibitors influencing the scope and impact of the Goth Village we might conclude:

- peripheral location of Masłomęcz having impact on regional scale of the Goth Village open-air museum's influence (only within Lubelskie voivodeship);
- seasonal character of the Goth Village activities – the open-air museum is opened for organised groups (children from schools, kindergartens) and individual visitors between May and October.
- demographic crisis in rural areas (especially in peripheries) hinders generational replacement among the members of the Goth Squad involved in the action of the Goth Village open-air museum.

A Theory of Change framework has been developed for the purpose of this study retrospectively, by reading documents, talking to residents and stakeholders, as well as analysing data. Thus, it might serve as evaluation reflecting what has worked or not in order to understand the past and plan for the future activities towards local development of the village.

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