Marginalization in Rural Canada: a Research Program
DRAFT
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1. Introduction

Rural Canadians are facing significant challenges as their traditional markets, work structures, mobility, and social services are altered by forces largely beyond their control. In the process, there are some who benefit and some who lose. Our primary objective is to understand the processes of marginalization and integration sufficiently well to maximize the benefits and minimize the losses — not only in the short term but for the long-term benefit of all segments of our society.

Marginalization is a process whereby individuals or groups are excluded from systems which control their rights over resources[1], services[2], or information. These systems take many forms: from the legal regulations of formal organizations to the more informal traditions or customs one finds in small groups or families. As a consequence, the dynamics of marginalization will vary significantly by context and explanations directed to specific groups are likely to require the analysis of several processes.

Marginalization is wasteful, unhealthy, unprofitable, and immoral: it wastes human capacity; it is disruptive to social cohesion, security of property, learning, and psychological health; it encourages unhealthy dependency relations at all levels; it drains economic and social resources; it reduces demands for goods and services; and it offends our sense of morality and justice. In addition, it is particularly damaging because of its cumulative nature.[3] We must find ways to reverse the process and minimize its negative effects.

This imperative drives the research program under the marginalization theme. We need to identify the conditions and processes whereby rural individuals, communities, and agencies become excluded or included in the primary systems of control. We need to identify those which are most vulnerable to exclusion, and we need to understand how they might overcome exclusion.

2. Research Strategy

In modern society, the most important powers are rarely held by individuals, but are located in institutions and organizations. From this point of view, these institutions represent systems of entitlements with powers of inclusion and exclusion regarding resources, services, and information. Any examination of marginalization must therefore include an examination of the structure and restructuring of institutions and organizations. This includes an examination of the major centres of power in our society, even if they are not physically present in rural society. As Stinchcombe (1968: 159) points out, control is more often dependent on its established legitimacy among those in centres of power rather than among those over which the power is exercised.

Our research strategy will therefore include an examination of changes in the structure of institutions as systems of entitlements over the most important resources and services of rural Canada. Four general systems will be examined: the private sector, the state, the third sector, and family and friendship networks. Each of these spheres represent relatively integrated systems of control over resources and services, and each of them is guided by a different balance of goals, values, and organization principles which are crucial to understanding the processes which drive them. The private sphere, for example, is primarily organized within a corporatist structure, driven by accumulation in a market framework. The state shares some of these characteristics, however, its bureaucratic organization is much more sensitive to popular legitimation of its activities. The volunteer structure of the third sector means that it is more responsive to idiosyncratic interests, and the reciprocity at the basis of kin and friendship networks makes them less flexible to change and fashion.

Within each of these spheres, the distribution of resources and services will serve as the focus of attention for our research. We will begin by examining the distribution of economic and social services in rural Canada in order to identify both geographical and temporal variations of note. Particular attention will be given to the types of individuals and communities which appear to lack economic resources or access to services as a strategic measure to limit the scope of work required.

Within this framework, we will focus on the following elements in our research plan.

C   We must investigate the **conditions** and **processes** which limit or encourage inclusion. Thus, one aspect of our work must focus on identifying the major structural features related to exclusion and inclusion as well as the processes of creation, maintenance, and change which underlie them. These conditions are reflected in the changing distribution of resources, services, and information throughout Canada, and the structure of entitlements, both formal and informal, which operate to exclude or include.

C   We must investigate the **consequences** of marginalization. Since these consequences will be different under various circumstances, research on this aspect will focus on those rural Canadians who are particularly vulnerable to exclusion: the elderly, single mothers, the working poor, Aboriginal peoples, and youth.

C   We must investigate the **strategies** which individuals or groups adopt and the way those strategies might overcome or exacerbate exclusion. This requires research identifying the actions of individuals, groups, and organizations along with the circumstances and outcomes of those actions. Collective action in all its forms will be of particular significance here in keeping with our interest in communities and organizations as well as individuals.

These three elements must be addressed at the same time since the insights gained by research on one area will be essential for understanding the others. To make it work, we will have to maintain regular contact and discussion between researchers. I presume this commitment would form a basis for participation in the research team.

Within this framework, we need to answer the following types of questions. I have included some suggestions of contributions which have been and might be made under several of these questions.

2.1. How are resources, services, and information distributed over rural Canada?
C   This question requires work of a theoretical nature as well as field research which will allow us to examine the empirical and normative aspects of the issue.
C   It is directly related to the examination of access to services which is part of the site profile study.
C   I have completed a study of the distribution of hospital services in rural Canada (Reimer et al., 1993) and examined the geographical distribution of leading and lagging CSDs (Reimer, 1997).
C   This question needs to be considered in a longitudinal fashion. I am currently augmenting the 1991 rural Canada database to include CSD information from 1986 in order to deal with this need. This can eventually be expanded to include 1996 and 1981.
C   CRRF has recently completed a preliminary study of the extent to which First Nations communities are integrated or segregated in their surrounding settlements. It touches on the question whether they are part of the local systems of control over resources, services, and information. The reports from this work include a proposal for research in the NRE field sites.
C   This question requires the development of a more inclusive database: one which contains institutional and social network information of both a formal and informal nature.
C   The investigation of this question will be useful for the development of rural indicators.
C   I plan to continue work along these lines: investigating the distribution of hospital services, police services, educational institutions, business development centres, etc. These will all be integrated into the CSD database.

C   Regional and case-study analysis is also required here, in order to get information regarding the less formal benefits.

2.2. What are the major processes affecting the distribution of these resources, services, and information?

C   This question requires both theoretical and empirical work. The theoretical work will help us make sense of the distribution of resources, services, and information found above. It will also alert us to those processes to which the current analysis is insensitive. The empirical work will allow us to test the many claims which are made regarding those processes.

C   Empirical work at the level of individuals, households, communities, and provinces is most likely to generate insights regarding these processes.

C   I have outlined some of the major processes identified in the literature as part of the determination of the sampling frame (Reimer, 1996, 1997) and discussion of leading and lagging regions (Reimer, 1997). I plan to continue this work in response to feedback coming from my report at the October conference.

C   I am also planning to investigate the processes by examining the extent to which various types of rural individuals utilize various types of services (private, state, voluntary associations, kin and friends). This is an extension of my paper in the "Changing Rural Institutions" Book (Reimer, 1997).

C   We need work on the role of formal and informal entitlements: what they are, how they are maintained, and how they are changed.

2.3. What are the major consequences of marginalization?

C   This question should be considered with respect to particular types of rural residents, communities and regions. I have identified and mapped the distribution of four types of vulnerable persons based on economic and relative frequency criteria (Reimer, 1995). These rather narrow criteria need to be expanded.

C   I have also done some general work in this area focusing primarily on economic resources. This includes a paper relating the Low Income Cutoff to social and indicators of deprivation from the General Social Survey (Reimer, 1991). It demonstrates how the census data only touches on a few aspects of deprivation.

2.4. What are the major strategies adopted by individuals and communities to deal with changes in the distribution of resources, services, and information?

C   This question addresses the 'agency' aspects of the issue. It therefore will appeal to those who wish to discover what individuals and local communities can do about perceived inequities.

C   This question requires considerable work at the field level since we do not have much information regarding the strategies used. The strategies are likely to vary over individuals, households, communities, regions, and time.

C   Freshwater and I have done some speculation on such strategies from the point of view of economic policy and agriculture (Freshwater and Reimer, 1995).

C   Young (1995) and Szekely (1996) have produced theses looking at strategies adopted by single mothers and low-income elderly, respectively (these are students with whom I have worked).

C   I have done some work on the informal economy using the General Social Survey (Ellison et al, 1997). We compare metro and non-metro respondents at various income levels. It highlights the inability of the very poor to participate in the informal economy. I plan to follow-up this line of research at the field level.

C   We need work on the creation and maintenance of collective action as well as the outcomes.

2.5. What are the ways in which the distribution and strategies interact to affect exclusion and inclusion?
- C   This question recognizes that inclusion and exclusion is the result of interaction between the distribution of resources and the strategies developed to deal with it. It is the most complex of the questions since it can only be answered by considering both aspects over time.
- C   I would like to explore the utility of complex system modelling to deal with the interactions involved. My musings on this issue have focused primarily on the situation of single mothers in rural areas.
- C   Strategically, this question is probably best dealt with by focusing on specific types of individuals, communities, resources, services, and/or information.

2.6. Which strategies are most effective for which conditions?
- C   This question gets to the heart of our initial question. Addressing it will reveal the opportunities for rural Canadians and a basis for policy which can enhance their position.
- C   We cannot expect to produce a 'rule book' in answering this question, but by continuing the work on all of the questions above, we can provide guidelines for the most important processes to consider, with their likely consequences.

3. Data Requirements

These questions require information to be collected at a number of levels: national, local, and individual. The data required at the national and site levels are identified in the Field Site Manual (Reimer, 1997), therefore, the focus here will be on the individual and household information.

3.1. National Level
- C   historical and documentary data (cf. Fairbairn, 1998)
- C   census and survey data (cf. CRRF rural database)

3.2. Site Level
- C   cf. NRE Site Profiles Workbook, 1998

3.3. Individual and Household Level

My proposal is that this information be collected using a complex sampling strategy of both simple random and stratified samples of households in each of the research sites. It would consist of a random sample of households as a core. This core sample would be augmented by stratified random sampling to ensure that an adequate number of the following types of respondents are included: elderly, youth, working poor, single mothers, and Aboriginal peoples (if appropriate).

All persons over 17 years of age will be interviewed in the households selected in the core sample. The number of respondents in the various strata will be calculated upon completion of the core interviews and this number will form the basis for the selection of people for the stratified sample.

The minimal objective will be approximately 125 respondents per site.

The general data needs for the individual and household sample is the following.
- C   Relationship to the private sector
    - C   employment and income histories
    - C   wealth and asset histories
    - C   family structure history and economic interdependence

- C   Relationship to the public sector
    - C   education histories
    - C   medical histories
    - C   justice/police histories

- welfare histories
- involvement/use of government programs at all levels of government

- Relationship to the third sector
  - involvement in business associations and groups
  - involvement in religious groups
  - involvement in recreational associations and groups
  - involvement in cultural associations and groups

  - Relationship to family and friends
  - availability of social networks
  - exchanges within social networks
  - participation in the informal economy

1. Resources include real property (land and buildings, capital goods) and intellectual property (talents, skills, knowledge, learning capacity).

2. Services include knowledge- or information-based services as well as business and personal services.

3. Thanks to Peter Apedaile for this formulation.