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ASPECTS OF FARMLAND LEASE IN THE CONTEXT OF HOMESTEAD FUNCTIONING IN WARMIAN-MASURIAN VOIVODSHIP

Key words: land lease, homesteads, land prices, lease rent

ABSTRACT. The aim of this research was to identify and assess the impact of chosen aspects of farmland lease on the functioning of homesteads in the Warmian-Masurian Voivodship. It was achieved through an opinion poll carried out with the use of questionnaires among 101 leaseholders and purchasers from the region of Warmia and Masuria. By the end of 2017, over 4.74 mln ha of land was purchased by the Agricultural Property Stock of the State Treasury (APAoST). The lands of the State Treasury were spatially diverse but the majority was located in north-west Poland. Firstly, they underwent a process of management privatization (administration and lease), and later proprietorial privatization (sale). At the end of 2017, 3,4m ha of purchased lands were permanently managed, the majority of which (80.4%) were sold. The Treasury still owns 1.4 mln ha of lands and leases 1.03 mln ha of it, 11.8% of which is located in the Warmia and Masuria Province. The decision on the form of cultivating the farmlands (lease/purchase) was determined financially (mostly mortgages and private funds), whereas their development and functioning were mostly determined by resources (area and quality of farmland, machinery park), price of farmland, profitability of production, and demand for farm produce. The possible development of homesteads was strongly impacted by a financial barrier, which resulted from the availability of funds needed, liabilities, legal-formal regulations regarding the purchase/lease of agricultural properties, lease rent, and instalments for purchased land.

INTRODUCTION

Business entities wanting to increase their business activity and improve its efficiency use two methods. The first includes gradual expansion with the use of own sources (organic growth), the second discontinuous growth through the acquisition of other companies or parts of their resources. In order to grow organically, an enterprise should create new assets and to avoid acquisition, assets should be purchased. Both methods require owning assets. As a result, traditional strategies of boosting businesses are risky as they consume a large amount of money at the beginning of implementation while initial profit appears much later. Such an increase in business scale leads to a short-term or permanent drop of income. The second type of strategy is less risky and allows for the fast, permanent growth of sales and income. The strategy is called “growth lever” and does not require

owning assets. The implementation of this strategy means increasing business activity without the financial burden associated with owning assets [Hagel III 2008].

The process of proprietary changes in government sector of agriculture is realised by the virtue of the Cultivation of Agricultural Properties of the State Treasury Act from October 10th 1991, which clarifies the execution of owner's rights and other material rights in reference to agricultural properties acquired by APAoST [Journal of Laws, 1991.107.464]. The novelisation of the Civil Code in 1990 [Art. 160, 161, 163, Journal of Laws, 1990.55.321] enabled the realisation of this process, as it defined "agricultural property" and overruled previous acts describing the subjective and objective circumstances of turnover of agricultural properties, thus derestricting the contractual purchase of agricultural properties [Marciniuk 2017]. The assumption was that the development of agriculture would lead to the gradual concentration of land and production, thus the amount of homesteads in regions with high fragmentation would be reduced, and in regions with a high concentration of government land would cause an enlargement of the area and creation of new homesteads [Dzun 2015, Mioduszewski 1995]. Currently, the process of proprietorial changes in agriculture is carried out by the National Agriculture Support Centre (NASC¹). Hitherto, these tasks were carried out by the Agricultural Property Agency (APA), the legal successor of the Agricultural Property Agency of the State Treasury (APAoST). The process consists of three stages: the acquisition of agricultural properties into the Stock, restructuring, and privatisation. In total, over 4.74 mln ha of land were intercepted by the Stock of APA by the end of 2017, 80% of which (3.76 mln ha) came from 1666 liquidated State Agricultural Farming Companies (SAFC) and 12.8% (over 0.6 mln ha) from the National Land Resource (NLR) [KOWR 2018]. The location of land undergoing acquisition by the Stock was spatially diverse, though most land was in northern and western Poland. Lease was the most basic and, at the same time, most popular form of cultivation of land from the APA's Stock. For most leaseholders, it was the reason for acquiring land. The biggest area of agricultural land under lease was noted in 1996 (over 2.9 mln ha), which accounted for 2/3 of the Stock. In following years, the area of leased grounds gradually decreased, which was a result of purchasing land by precious leaseholders. By the end of 2017, around 3.4 mln ha of land was managed within the country and around 1.4m ha remained in the Stock, out of which 1.03 mln ha was leased and 121.6 mln ha was located in the Warmian-Masurian Voivodship [Mioduszewski et al. 2018]. Separate regulations regarding the lease of agricultural properties are significant as they provide relative stability of management for leaseholders and protect the rights and interests of land owners [Marks-Bielska 2016]

A farm's ability to develop is determined by its' production capability, which depends on owned resources of factors of production (land, workforce and capital) or on rights to utilise it (lease, rent, lending, etc.). Not only is the amount of factors of production important, but so are the mutual relations which allow their rational usage in production. One should know that changes in proportions of factors of production, especially in agriculture, are very slow and are influenced by various macroeconomic factors. Usually,

¹ Created on September 1st 2017 by virtue of the National Agriculture Support Centre Act from February 10th 2017 [Journal of Laws, 2017.623], which carries out tasks of the Agricultural Market Agency and Agricultural Property Agency.

resources are moved to more efficient applications, though there are barriers resulting from the specifics of farming which has a limited mobility of production factors (mainly land), multiple purposes of management, and bio-environmental limitations [Baer-Nawrocka, Markiewicz 2013, Tomczak 1983, Sass 2016].

RESEARCH METHODS AND MATERIAL

The aim of this research was to identify aspects of lease of agricultural lands and their influence on the functioning of homesteads in the Warmian-Masurian Voivodship. The assessment was based on an opinion poll using questionnaires among leaseholders and purchasers of agricultural properties of the State Treasury, and/or private lands who run their businesses in the region of Warmia and Masuria. Research was carried out by the employees of the Section of the District Advisory Board in Agriculture of the Warmia-Masuria Agriculture Support Centre (ASC) in Olsztyn in 2017. The respondents were chosen in a process of intentional selection. The chosen entities either lease or purchased agricultural properties in the Warmian-Masurian Voivodship and cooperate with ASC. In total, they contacted 129 leaseholders and purchasers of agricultural land, 105 respondents (81,4%) agreed to take part in the survey and sent back questionnaires, and 101 of them (78,3%) were taken into analysis as they had been filled in fully and properly. Bearing in mind the systematic error of the method (CMB), the questionnaire used Brewer's method for sampling [Brewer 2006]. This approach aimed at eliminating CMB by using one sample of the respondent to assess the independent variable and the other sample to assess the dependent variable. In the presented research, the independent variable was the area of agricultural land of households (so called administrative data) [Podsakoff et al. 2012, Jakobsen, Jensen 2015]. Moreover, respondents were to assess the factors that should decrease the risk of the discussed error, as well as the importance of their influence on the efficiency of the business. The following steps were: Cronbach's Alfa Test, Kaiser-Mayer-Olkin's Tests, and Bartlett's Test (Table 1).

On the basis of the results of Cronbach's Alfa and Kaiser-Mayer-Olkin's Tests the reliability of the research tool was proved. The author is aware that the chosen factors are correlated. This comes from the fact that they refer to the same phenomenon. Nevertheless, the aim of the research was not to identify the correlation but to identify their occurrence and assess them in the context of the efficiency of running a homestead. In the analysis and assessment, attention was put on the financial aspects of agricultural land lease, and the way they influence the perception of land by farmers as one of the main resources enabling the functioning and development of their homesteads. In order to address the formulated research problem, statistical analysis was carried out with the use of the IBM SPSS Statistics 24 programme.

Table 1. Competence of the survey

Cronbach's Alfa Test	Kaiser-Mayer-Olkin's Tests	Bartlett's Test
0.896	0.800	1,273.245*

* $p < 0.000$

Source: own study based on the outcomes of the research

It underwent descriptive statistical analysis, χ^2 (chi-square) tests, and Kruskal-Wallis tests for chosen variables. The level of significance was set to the classic level $p < 0.05$, thus results with p between 0.05 and 0.1 were considered close to statistical significance (on a level of statistical tendency). In the first step, basic descriptive statistics of the researched quantitative variables were measured together with the Kolomgorov-Smirnov test, which indicated that the distribution of variables is extremely different from normal distribution. Thus, analysis with the use of non-parametric tests was necessary. The homesteads under research were divided into three groups. The first group consisted of homesteads with up to 50 ha of farmland, the second with a land area between 50 and 100 ha, and in the third group were homesteads with over 100 ha of land. The method of tabular-descriptive statistics was used to analyse and assess the results of the opinion poll and statistic data referring to the cultivation of the Agricultural Property Stock of the State Treasury.

RESULTS OF RESEARCH

Research was carried out among 101 leaseholders and purchasers of agricultural lands of the State Treasury, and private owners, whose homesteads coved an area of around 11.2 thousand ha in total in 19 districts of the Warmia-Masuria Voivodship. 94.1% of that area was arable land. Over 2/3 of respondents (69.3%) run their homestead as a result of handing over/inheriting it from their parents. In the utilisation structure, the acquired lands contributed to a mere 22.2%, while other lands have been leased/purchased from APAoST or other farmers, 50.7% of which came from the Stock (around 5.7 thousand ha), out of which 38.4% (2.2 thousand ha) was bought out. Over 1/4 of land (around 3.0 thousand ha) came from private owners, out of which 77.3% (around 2.3 thousand ha) was purchased, and the rest utilised on the grounds of a lease agreement with owners. The majority of the 101 respondents (99.0%) managed the homestead personally, and only 1 homestead hired a manager. The respondents were mostly young people, and around 2/3 of them were younger than 50 years old. 30.7% of the group were people between 51 and 60 years old, and respondents over 60 years old only constituted 6.9% of the group. The analysis of job seniority indicates that the respondents have worked in agriculture for a long time and are well prepared to manage owned homesteads, which they consider their profession. They gained experience in agriculture mostly by working on their own farm, and every fifth respondent in a state homestead or other homestead. Over a half of homesteads (55.4%) had 253 employees in total, and 40.7% were family members of the farmers (a total of 103 people). Only every fifth homestead (mainly those with animal production and over 100 ha of farmland) hired permanent employees (95 people) and 24 homesteads hired temporary workers (55 people). The level of employment in the researched homesteads mainly depends, according to the respondents, on the profile and scale of production, the technical-technological provision of production resources, the ability to hire qualified personnel and labour costs.

The dynamics of the process of cultivation of farmlands from the APAoST was affected by demand and supply, shaped by the socio-economic situation, legal-formal regulations on the profitability of agricultural production as well as by the level of lease rent. Between 1992 and 2017 lease rent in PLN grew nine-fold (from PLN 57 to 511 for 1 ha of farmland),

and that relation was even higher for sale's prices, i.e. it grew 62-times (from 0.5 to 31.1 thousand PLN/ha). The level of lease rents was affected by the demand-supply ratio on the local market, the profitability of farm production and the introduced legal limitation on the turnover of farmland². Since 2003, lease rent and prices for farmland had the biggest dynamics of growth, which was related to Poland's European Union (EU) accession and the introduction of subventions to farming. Direct subventions changed the attitude to land in two ways: they were seen as a resource used in production, and an asset bringing income (direct subventions) [Mioduszeowski et al. 2018]. Moreover, in times of downturn direct subventions can be a stabilising factor maintaining investment in homesteads, thus prevents the processes of asset reproduction from weakening [Grzelak 2014]. Using direct subventions resulted, as Wawrzyniec Czubak and Arkadiusz Sadowski [2014] indicate, in decreasing the supply of agricultural land and, as a consequence, the lease of land becomes the main way of increasing the area of cultivated farmland.

The aim of the research was to identify factors stimulating the development and management of a homestead. On the basis of analysis, three groups of factors were singled out. The first group, according to the respondents, are resource factors reflected by the size of a homestead (the area of arable lands), quality of owned lands, possession of machine park, and level of farmland prices on the market. The first group also includes factors shaping the profitability of the farming business, which is created by prices of means of production, prices of purchase and costs of farm production, and demand for produced goods. Geographical location and weather conditions of the region determine the profit of agricultural production. In the second group, there are factors connected with the funding development of agricultural business, which include a level of private capital and general debt, legal-formal requirements of purchase of agricultural land, as well as availability of credits (and credit service cost) for the purchase of land, machinery and equipment, and the construction of buildings and constructions. This group also includes procedures of receiving subventions from the EU, qualifications of labour on a local market, as well as legal-formal regulations of lease, and level of lease rent of agricultural properties. The third group of factors includes those with lesser impact, in the opinion of respondents, on the development of homesteads. Those include level of taxation (ground tax), property insurance, and contributions for social insurance (Table 2). Further, it was analysed whether the size of a homestead significantly changes the perception of factors determining its development and functioning. 24 factors were taken into consideration. The analysis of each of the factors, with the use of the Kruskal-Wallis Test (respondents were asked to assess the influence of the factor on a scale of 1 to 5, where 1 was the smallest influence, and 5 the strongest) indicates a significant difference between three compared groups of homesteads in the perception of the influence of one of the factors, i.e. qualifications of labour on a local market. The following results were obtained:

1. Kruskal-Wallis test for the factor "qualifications of labour on a local market" – $\chi^2(2) = 7.129$, $p = 0.028$, average rank for set 1 = 41.68; average rank for set 2 = 53.91; average rank for set 3 = 59.20. Additionally, the sets were compared in pairs to determine which

² Shaping Agricultural Structure Act from August 5th 2015 [Journal of Laws, 2015.433 and 2179]. Discontinuation of Sales of Properties of the Agricultural Property Stock of the State Treasury Act from April 14th 2016 [Journal of Laws, 2016.585].

of them vary statistically. The results indicate that this factor is viewed differently by the set of smallest homesteads (set 1) and by those with an area of over 100 ha (set 3). For the first set of respondents, the average influence of the factor was marked 3.32, and for the third set it was 3.9. The respondents with the largest homesteads more often indicated this factor as significant for the functioning and development of their farm.

For the following two factors the obtained results were close to statistical significance (level of statistical tendency – p results between 0.05 and 0.1), i.e.:

1. Kruskal-Wallis test for the factor “level of taxation (ground tax)” – $\chi^2(2) = 5.858$, $p = 0.053$, average rank for set 1 = 53.81; average rank for set 2 = 57.04; average rank for set 3 = 40.68; The owners of the largest homesteads (set 3) see this barrier as less important than other owners.
2. Kruskal-Wallis test for the factor “legal-formal regulations regarding purchase” – $\chi^2(2) = 5.564$, $p = 0.062$, average rank for set 1 = 45.99; average rank for set 2 = 47.72; average rank for set 3 = 60.90; This factor is seen as more important by the owners of the largest homesteads (set 3) than the owners of smaller homesteads.
3. The perception of the remaining 21 factors did not statistically differ depending on the size of the homestead of the respondent.

Decisions on investment to enlarge a farm, its structure and production are crucial for the development of every homestead. They require funds to allow the realisation of the investment process. When private capital is insufficient, there is a need for an outer source of capital [Przygodzka 2006]. Therefore, decisions on enlarging a farm are significantly dependent on the level of private capital and availability of borrowed capital. The most commonly indicated source of capital used to enlarge a homestead (through lease or purchase) was bank credit (73.3%), private capital (57.4%) and family loan (9.9%). Only a few respondents indicated inheritance/donation (3.0%), loan from an institution other than bank (3.0%) or crediting the loan by APA (splitting the debt into instalments – 3.0%). The main sources of funds needed for the development of homesteads in the years 2014-2017 were credits for the purchase of machinery and equipment (52.5%), land (47.5%), and credits for the construction of outbuildings (15.8%). Outer sources of financing, especially unrepayable ones, play a significant role in the development of each business activity. As a part of the Common Agricultural Policy (CAP), the European Union introduced direct subventions, which were to compensate farmers for lower minimal prices and intervention prices for farm produce on markets within EU, to secure food provision. In Poland, direct subventions have been used since 2004. Moreover, the development of farms via modernisation and restructuration is supported as a part of the Development of Agricultural Areas Programme. In the years 2014-2017, every third respondent indicated they had received subventions for the modernisation of their farm, two respondents took advantage of subsidies for afforestation, and one received funding for an investment in sustainable energy production. Another element of the research was to determine whether there is a statistical relation between the size of a household and frequency of using outer sources of funding. The most common among the respondents was the investment credit for the purchase of machines and equipment (52.5%), land (50.4%), the construction of outbuildings (15.8%), subventions for the modernisation of a household (28.7%), the afforestation of land (2.0%), and sustainable sources of energy (1.0%). On the basis of the

Table 2. Factors influencing the development and functioning of a homestead*

No	Specification	Average N = 101	Median	Dominant	Standard deviation
1.	The size of a homestead (the area of arable lands)	4.7327	5.0	5.0	0.54573
2.	The prices of means of production	4.6040	5.0	5.0	0.72221
3.	Quality of land	4.5941	5.0	5.0	0.56883
4.	Unstable prices of purchase	4.5149	5.0	5.0	0.74315
5.	Costs of farm production	4.5149	5.0	5.0	0.70162
6.	Price level of farmland	4.4950	5.0	5.0	0.78261
7.	Machine park	4.4059	5.0	5.0	0.76391
8.	Demand for produced goods	4.3366	5.0	5.0	0.88631
9.	Level of received subventions from the European Union	4.2574	4.0	5.0	0.82041
10.	Geographical location and weather conditions	4.0792	4.0	5.0	0.93470
11.	Private capital for development	4.0594	4.0	5.0	0.93618
12.	Level of lease rent	4.0198	4.0	4.0	1.00975
13.	Procedures of receiving subventions from the European Union	4.0099	4.0	5.0	1.05352
14.	General level of debt	3.8713	4.0	4.0	1.00661
15.	Legal-formal regulations of purchasing farmland	3.8713	4.0	4.0	0.90181
16.	availability of credits (legal-formal requirements)	3.8317	4.0	4.0	0.94941
17.	Credit service cost (level of instalments for purchased farmland)	3.7228	4.0	4.0	1.02097
18.	Investment credit service cost (purchase of machinery and equipment, construction of buildings and constructions)	3.6832	4.0	4.0	0.95844
19.	Qualifications of labour on a local market	3.6238	4.0	3.0	0.99851
20.	Legal-formal regulations regarding lease	3.5644	4.0	4.0	1.01406
21.	Level of instalments for purchased assets (buildings, constructions and other objects)	3.4653	4.0	4.0	1.10963
22.	Level of taxation (ground tax)	3.3762	3.0	4.0	1.15630
23.	Property insurance	3.2772	3.0	3.0	1.03072
24.	Contributions for social insurance	3.0099	3.0	3.0	1.09995

* marks on a scale from 1 to 5, where 5 is the most significant factor, and 1 is the least significant

Source: own report on the basis of the survey (N = 101)

carried out chi square tests, it was certified (there is no statistical relation) that the size of a household did not have any influence on the frequency of using outer sources of funding.

Regardless of plans and abilities of development, each household tried to maximise income from its business. In the view of respondents, the level of income was average (71.3%), every sixth respondent (15.8%) had a high income, and every ninth respondent (11.2%) had a small income. The perception and estimation of gained income by the respondent was highly influenced by the level of incurred costs of investment in the purchase of agricultural properties, level of taken credits, and level of paid lease rent, which are significantly tempered by the direct subventions for cultivating farmlands received.

CONCLUSIONS

In the process of proprietary changes in agriculture two main approaches can be observed among managing contractors (including farmers). The first approach – the strategy of creation and development of homesteads, was mostly determined by the financial situation, socio-economic development of the country, and by relatively quickly changing legal-formal regulations on the turnover of agricultural land. In the first phase of proprietorial changes, contractors developed homesteads with the strategy known as “growth lever”, thus they increased production scale via the lease of agricultural properties. In the opinion of respondents, making a decision on their purchase was crucial. A quickly growing demand for farmland significantly influenced prices of purchase, and, as a consequence, the level of gained profit and profitability of a business. In this context, one of the most important decisions in running a homestead were those referring to the manner of cultivating the farmland, i.e. gaining owner rights (purchase), or gaining usufruct rights (lease). The choice was highly dependent on the source of funding. The most common source of funds needed for increasing the area of a homestead (lease/purchase) among respondents was a bank credit and private capital. The carried out statistical analysis indicated that the size of a homestead did not influence the frequency of the use of outer sources of funding. On the other hand, according to respondents, the growth and functioning of a homestead was highly influenced by resource factors reflected by the size of the homestead, quality of owned farmland, possession of machine park, and level of market prices of farmland. The profitability of a business was likewise important and was shaped by, for instance, prices of means of production, the level of purchase price and costs of farm production, and demand for produced goods. The geographical location of a homestead and weather conditions were also significant for the gained results, as they directly influenced the achieved results of farm production. Likewise, what was important was the financial barrier resulting from the availability of capital needed for development (dotation and subventions from the EU, credits). Such a perception of the financial situation of homesteads was influenced by, for instance, legal-formal regulations regarding the purchase and lease of agricultural properties, level of instalments for purchased farmlands, level of lease rent of agricultural properties, level of instalments for purchased assets (buildings, constructions, and other objects), as well as need of incurring the tax load (ground tax) associated with running a farm.

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WYBRANE ASPEKTY DZIERŻAWY GRUNTÓW ROLNYCH W KONTEKŚCIE FUNKCJONOWANIA GOSPODARSTW W WOJEWÓDZTWIE WARMIŃSKO-MAZURSKIM

Słowa kluczowe: dzierżawa gruntów, gospodarstwa rolne, ceny ziemi, czynsz dzierżawny

ABSTRAKT

Celem badań była identyfikacja i ocena wpływu wybranych aspektów dzierżawy gruntów rolnych w województwie warmińsko-mazurskim. Dokonano jej na podstawie sondażu opinii, zrealizowanego techniką ankietową wśród 101 dzierżawców i nabywców nieruchomości rolnych z regionu warmińsko-mazurskiego. Do końca 2017 roku w Polsce do Zasobu Własności Rolnej Skarbu Państwa (ZWRSP) przejęto ponad 4,74 mln ha. Położenie gruntów Skarbu Państwa było przestrzennie zróżnicowane, a większość z nich znajdowała się w północno-zachodniej Polsce. W pierwszej kolejności zostały one zagospodarowane głównie przez prywatyzację zarządzania (administrowanie i dzierżawę), a następnie prywatyzację własności (sprzedaż). Na koniec 2017 roku z przejętych gruntów trwale zagospodarowano 3,4 mln ha, z tego większość (80,4%) przez sprzedaż. W ZWRSP nadal pozostaje 1,4 mln ha, z tego 1,03 mln ha jest dzierżawiona, z których około 11,8% położone było w województwie warmińsko-mazurskim. Na wybór formy zagospodarowania gruntów rolnych (dzierżawa/zakup) miały wpływ źródła finansowania (głównie kredyty i własne środki pieniężne). Natomiast w rozwoju i funkcjonowaniu gospodarstwa rolnego największe znaczenie miały czynniki zasobowe (powierzchnia i jakość użytków rolnych, park maszynowy), poziom cen gruntów rolnych, opłacalność produkcji oraz popyt na produkty rolne. Duży wpływ na możliwości rozwój gospodarstw miały: bariera finansowa wynikająca z dostępności do kapitału potrzebnego w rozwoju, zadłużenie, regulacje formalno-prawne zakupu/dzierżawy nieruchomości rolnych, poziom czynszów dzierżawnych oraz spłat rat za zakupione grunty.

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