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Theoretical potential of addressing production of marginality at the crossroads of spatial exclusion and development

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Introduction

The idea of the symposium on ‘Production of Marginality: Spatial Exclusion and Development’ that called most of the articles in this issue of *Intersections: East European Journal of Society and Politics (IEEJSP)* came from two international conferences that were enriching the academic stage of Babes-Bolyai University (BBU) at Cluj-Napoca, Romania in November 2014. A panel called ‘Spatial exclusion and social inequalities’ was held at the annual conference of the Hungarian Sociological Association¹ and the panel conveners proposed addressing the models of territorial exclusion and the social and political relations that (re)produced them on the ethno-socio-economic maps of local societies. Participants were also encouraged to focus on how local and trans-local factors and processes are shaping the spatial position and social status of the poor and rich, the ethnic Roma versus the non-Roma majorities in local settings. One week earlier the Romanian Society for Social and Cultural

¹The panel was held between 27-29 November at BBU and gathered eleven participants from Romania and Hungary with the aim to discuss the relationship between spatial exclusion and social inequalities. The idea of the panel resulted from two major investigation streams. A joint investigation of research teams from Hungary, Romania and Serbia conducted a contextual inquiry on faces and causes of marginalisation of the Roma in local contexts: *Faces and Causes of Marginalization of the Roma in Local Settings: Hungary - Romania - Serbia. Contextual inquiry to the UNDP/World Bank/EC Regional Roma Survey 2011* was a joint initiative of the United Nations Development Programme (UNDP), the Open Society Foundation’s Roma Initiatives Office (RIO), the Making the Most of EU Funds for Roma Inclusion programme and the Central European University/Center for Policy Studies (CEU CPS) between October 2012 and June 2014. The other main contextual and empirical support of the panel was the investigation conducted in Romania since 2011 on spatialisation and racialisation of social exclusion, or on the social and cultural formation of ‘Gypsy ghettos’ in a European context: the *Spatialization and racialization of Social Exclusion. The Social and Cultural Formation of ‘Gypsy ghettos’ in Romania viewed in a European Context* research was supported by a grant from the Romanian National Authority for Scientific Research, CNCS - UEFISCDI (project number PN-II-ID-PCE-2011-3-0354).

Development and Policy Interventions’ and another on ‘Post-socialist Neoliberalism and the Dispossession of Personhood’.

These panels fertilised several articles published in this issue of *Intersections: East European Journal of Society and Politics* as the authors could meet and exchange ideas about ways how political economy regimes are shaping the processes of spatial, including housing arrangements, and exploring mechanisms by which impoverished people are pushed into informality, illegality and stigmatised status, and are denied of social citizenship and personhood. The remarkable interest of Eastern European scholars in these topics implied an obvious intention of publishing themed articles by the editorial team of *IEEJSP*, and the call for papers on the ‘Production of marginality: spatial exclusion and development programmes’ was launched by guest editors Tünde Virág from Hungary and Enikő Vincze from Romania. The editors of *Intersections: East European Journal of Society and Politics* originally planned one special issue; the particularly strong interest of regional scholars, however, meant that two special sections are dedicated to this topic. Accordingly, some of the themed articles will be published in the next issue of *IEEJSP*.

Assuming that the formation of Roma ghettos across Europe as impoverished territories associated with ‘Gypsiness’ is a manifestation of spatialisation and racialisation of social exclusion, our approach acknowledges that advanced marginality is created by the overlapping mechanisms of capitalism and racism (Wacquant, 2008; Wacquant, 2012). This means that the spatial positioning of people belonging to different social classes or with diverse social status and ethnic backgrounds on the mental and geographic maps of localities is the territorial expression of social inequalities created by the larger political regime. Thus spatial exclusion is both a cause and a consequence of social inequalities, and marginalisation advances through both social and spatial processes. However, neither spatial exclusion nor social inequalities are created by space or poverty, but they are the effects of the economic and cultural order of capitalism, among others of its development paradigms (re)creating socio-spatial inequalities and injustices.

Spatial segregation (and of how material deprivation overlaps with ethnic separation) is a dynamic process: the territorial divisions of the settlements, and the concepts used to identify them are subject to continuous economic, social and political changes during which the local actors re-construct and divide the space according to their social, economic, and political interests (Harvey, 2008; Mitchell, 2003). Moreover, local development projects or different community based programs applied to segregated neighbourhoods are typically structured in a way that facilitates the access to the financial resources of the European Union, and they reflect the interests of various local actors positioned unequally in the local power structure.

In empirical terms this approach implies the analysis of different patterns and mechanisms of spatial exclusion affecting marginalised Roma. It addresses the historical dynamics of their spatial position in a given settlement and connects these phenomena with development programmes that create or eliminate Roma colonies and slums, or aim at (Roma) community development. This approach, beyond the localised empirical materials, also endorsed the theoretical potential of addressing the production of marginality at the intersection of theories on spatial exclusion and

theories of development. In addition, the editors of *Intersections. East European Journal of Society and Politics* expected that the articles also explore to what extent the production of marginality is an endemic feature of capitalism and what particular features it displays a quarter century after the demise of state socialism and under the conditions of the prevalence of neoliberal governance.

Conceptualising the production of marginality

Re-politicising spatial exclusion

While approaching production of marginality through the lenses of spatial exclusion, one may start looking for adequate methodologies by which to understand the functions of space in the process of exclusion or the role exclusion plays in the creation of spatial arrangements of human life, using the theoretical benefits that the spatial turn brought into social sciences. In this approach space is acknowledged as an important dimension of inquiry, as ‘position and context are centrally and inescapably implicated in all constructions of knowledge’ (Cosgrove, 1999:7). Recent studies in various fields asserted that ‘space is a social construction relevant to the understanding of the different histories of human subjects and to the production of cultural phenomena’, and that spatiality matters ‘not for the simplistic and overly used reason that everything happens in space, but because *where* things happen is critical to knowing *how* and *why* they happen’ (Warf and Arias, 2009:1). Moreover, besides inquiring the space as a social product (Lefebvre, 1974), or the multiple aspects of the relationship between the social and the spatial (Tonkiss, 2005), or the way in which social inequalities are inscribed into space through spatial production processes and in which societal and spatial dynamics are creating segregation (Cassiers and Kesteloot, 2012), interpretations of the phenomenon of marginalisation might also be based on the examination of space in relation with social justice (Harvey, 2010[1973]; Purcell, 2002; Mitchell, 2003; Soja, 2010).

In order to provide a contextual analysis of the broader structural factors that contribute to the creation or conditions of the ghetto (Whitehead, 2000) as a particular space of marginality we must not forget that ‘much of what should concern us about ghetto life has its ultimate determinants in much larger structures, beyond the reach of the ghetto dwellers’ (Hannerz, 1969:13). With the aim of taking one step further in the identification of such determinants, many scholars are following the theory of advanced marginality according to which this is a new form of social exclusion in neoliberal regimes, having characteristics such as accumulation of economic penury, social deprivation, ethno-racial divisions, and public violence in the same distressed urban area. This type of expulsion does not stem from economic crises or underdevelopment; it is rather the result of economic restructuring and its unequal economic effects on the lowest faction of workers and subordinated ethnic categories as Wacquant (2008) cogently describes. To facilitate the inclusion of systemic perspective into the analysis of spatial exclusion, the analyst cannot avoid recalling the inquiries generated by critical urban theory (as discussed in Smith, 2002;

Brenner and Theodor, 2002; Brenner, 2009; Marcuse et al., 2010; Brenner et al., 2012). Critical urban theory addresses the role of the urban question and more broadly the politics of space in the history and geography of capitalist development, or in creating, solving and recreating the contradictions and crises of capitalism. This approach allows one to address the production of space (and spatial exclusion) as foundational for the growth and survival of capitalism (Lefebvre 1968), or to interrogate the spatial specificity of the reproduction of labour (Castells 1977) and even more to cross-examine the spatialisation of political economy (Brenner 2000; Brenner, 2009; Peck et al., 2013).

Marginalisation by (uneven) development

Critical urban theory proves to be a prolific frame for the conceptual effort to link theories of spatial exclusion to theories of development when addressing the production of marginality as a systemic process. Most importantly, the concept of uneven development has the potential to connect production of marginality via the political economy of space to capitalism. This approach offers us creative insights into how and why production of marginality is another face of uneven development: while capital travels across different spaces at different scales it has the effect of elevating some spaces while simultaneously marginalising others. According to Smith (1984), uneven development is the geographical expression of the fundamental contradiction of capitalism between use value and exchange value as a result of which there is development in one pole and underdevelopment in another pole. One of his main questions was about the contribution of the geographical configuration of the landscape to the survival of capitalism. In this context, he also suggested analysing how capital is producing the space in its own image via investing into built-up environments or moving to another area because of the promises of higher profitability elsewhere. Harvey also observed that the spatially and temporally uneven processes and outcomes are functional to capitalism (Harvey, 2006), and that capitalist expansion always happens through accumulation by dispossession (Harvey, 2008), i.e. accumulation of wealth and power in the hands of a few by dispossessing the public of their wealth, goods, or lands. However, what exactly is brought within the capitalist logic of accumulation differs from time to time. Even more, one has to note that ways how, for example, the spatial organisation of the city acts as a source for the development of capitalism in diverse periods (in the 19th, 20th or 21st century's capitalism) are displaying distinctive modes of capital accumulation (Harvey 1985; Harvey, 2008).

Recent East-European studies suggest that polarization of impoverishment 'partly resulted from marketization: backed by neo-liberal incentives and measures, the flows of capital and investment targeted the best developed areas while abandoning more underdeveloped regions' (Szalai, 2014:140). Under these conditions, the formation of 'Gypsy ghettos', as instances of Roma marginalisation, happens at the crossroads of multi-level processes that create territorial disparities and uneven developments between and within regions, counties and localities (Vincze, 2015b). The result is the emergence of rural areas where people are surviving on

subsistence agriculture, small towns that lack economic activities providing decent jobs for the inhabitants, or ‘poverty pockets’ in larger cities where multiple economic deprivations become territorially concentrated. The formation of spaces of economic deprivation is overlapping with ethno-territorial segregation of marginalised Roma, and the poor segregated areas are culturally stigmatised ‘Gypsyhoods’³, though they are not necessarily inhabited predominantly by persons self-identified as Roma. Faced with such phenomena, public authorities, non-governmental organisations and funding bodies are looking for development programmes to tackle them. Within this system, the capacity to attract funds becomes a key condition, and those actors who are not competitive on this specific market, are classified as subjects unworthy of development. Furthermore, the development programmes dedicated to poverty reduction transfer the accountability of this objective onto the shoulders of the impoverished categories themselves, stating that they should be empowered to solve ‘their own problems’. These trends are also manifested and (re)produced in ways how marginalised ‘Roma communities’ are transformed into an object of development. This process becomes part of their racialisation, since in a colonial spirit, it transforms Roma into a subject that needs to be developed, while the projects for Roma are conceived as a potential route for attracting external funds, and are mostly based on merits and not on needs and rights. Altogether, one has to note the existence of a ‘sharply unequal distribution of developmental and urban renewal funds to upgrade local infrastructure in middle-class-dominated segments while allowing for prolonged spontaneous degeneration in quarters inhabited by Roma and the truly poor’ (Szalai 2014:141).

Going beyond the post-socialism paradigm

It is not the aim of this current journal edition to contribute to the debates opened up by former issues of *Intersections. East European Journal of Society and Politics* around post-socialism (Petrovici 2015) or about what Central and Eastern Europe is (Piotrowski 2015). However, we have to underline the differences between one stream of the theoretical approaches towards poverty, exclusion or marginalisation that emphasise the post-socialist nature of these trends in our societies, and between those that relate them to the very features of capitalism. Moreover, it is necessary to note that in current Eastern European contexts post-socialism typically means anti-socialism, and it is used as a discursive device; not only in order to justify neoliberal policies while pretending to empower the individual faced with an oppressive state, but also to sustain that globalisation of capitalism as it happens today is not a political option, but a natural extension of the market as embodiment of freedom and guarantee of economic well-being (Vincze 2015a).

³These ideas were also developed in the Short report on Romania – *Uneven development and Roma marginalization: from economic deprivation to ethno-spatial exclusion* (October 2013), resulted from *Faces and Causes of the Roma Marginalization in Local Settings*. Contextual inquiry to the UNDP/World Bank/EC Regional Roma Survey 2011, focusing on Hungary, Romania, Serbia, and as well as in a 2014 special issue of the journal *Studia UBB Sociologia* on the spatialisation and racialisation of social exclusion.

Following Bodnár (2001), who addresses the socialist economy as a strategy of a developmentalist state in the periphery of the capitalist world system, one may affirm that after the dismissal of the socialist economy or of the developmentalist state, the former socialist countries continue to be shaped by how they are connected to current global capitalism, i.e. to a global post-industrial, post-developmental and post-welfare regime. Therefore, our subject, the production of marginality, might be approached as a phenomenon endemic to capitalism and as a process that displays the commonalities of this political economy across countries and larger geopolitical spaces, and not as something specific to post-socialism. Such a perspective could assure that, even if they are studied in Central and Eastern European countries, issues such as the marginalisation of the Roma, or the processes of impoverishment and spatial exclusion are not linked to the region's allegedly primitive and backward nature, but to the very ways how the region itself and its precariatized and racialised working class (Vincze 2015b) is adversely incorporated into the capitalist world system.

Marginality at the crossroads of spatial exclusion and development: this issue of IEEJSP

The first article in this issue follows critical urban theory's understanding of the political economy of space and development, and their role in the formation of capitalism. Enikő Vincze argues that the spatial and social peripheral inclusion of marginalised working class (Roma) into the society is a manifestation of the *adverse incorporation of a precariatized and racialised working class into the capitalist system*. Exploring the mechanisms of this adverse incorporation in the context of a critique of capitalism she analyses the politics of socio-spatial marginalisation and the politics of entrepreneurial development conceived via neoliberal governance in the present capitalism in Romania.

The drastically increased displacement of Roma people in Sofia are studied by Mariya Ivancheva who discusses the legacy of state socialist housing policies and the changing housing regime during Bulgaria's transition from state socialism to post-socialism. She combines archival and secondary sources with ethnographic observation and qualitative interviews and investigates legal regulations and policies that made Roma settlements in Sofia vulnerable to demolition and their inhabitants to displacement. The main argument of this article combines historical explanation of state-socialist legacies with a dominant feature of present East-European capitalist development: the *typical self-built houses of the Roma that were informally tolerated but formally not legalised under state socialism paved the way of the eviction of the Roma* by neoliberal urban authorities seeking space for new private investments. Thus former inhabitants of the destroyed illegal houses were pushed out to zones without economic and education opportunities, reinforcing the marginalised status of them. Urban governance policies and mechanisms of uneven spatial development are equally central issues in the article of Márton Czirfusz, Vera Horváth, Csaba Jelinek, Zsuzsanna Pósfai and Linda Szabó who present three case studies of local urban regeneration in the most stigmatised area of Budapest, the Eighth District

(Józsefváros). The authors discuss the cases of the Corvin Promenade, the Magdolna Quarter Programme, and the ongoing Orczy Quarter project, including the underlying revanchist policies and discourses to explore gentrification and rescaling urban governance concerning the area. This study understands *structural factors contributing to exclusion, criminalisation, displacement, and othering through a scale-sensitive political economic approach*, and explores three major dynamics of rescaling urban governance in Hungary as the main arguments: first, in the 1990s, the decentralisation without the redistribution of resources, then the EU accession and Europeanisation of public policies from the 2000s and finally the recentralisation after 2010.

Developmental programs on social integration in two small towns are studied by Judit Keller, Katalin Fehér, Zsuzsanna Vidra and Tünde Virág. Their comparative case study argues that *institutional models of developmental change play a dominant role in shaping the capacity of marginalised individuals on the long run*. In one of the cases the local government mayor acted as a socially skilled entrepreneur and managed to build a powerful local developmental agency. This mitigated the exclusionary mechanisms of the external institutional system and supported the emancipation of poor Roma families for a number of years in one of the small towns investigated. However, exclusionary mechanisms dominated the local institutional configuration in the other small town where uneven distribution of developmental mandates implied an increasing polarisation between the individuals of marginalised status (in particular the Roma) and the relatively better-off within the community. The authors demonstrate that the latter institutional model implies the absence of an integrated local community as in this case public goods are more likely to be appropriated by the incumbents. Accordingly, exclusionary institutional mechanisms hinder the evolution of innovative solutions to socio-economic problems and weaken the developmental capacities of local communities.

In addition to the themed articles, two interviews prepared by Szilvia Rézműves, a social politician and national project officer of the ROMACT programme give an insight into the use of development funds targeted at Roma integration. The interviewees are two professionals, Deyan Kolev and Ádám Kullmann who have had a longer experience in managing and evaluating the use of these types of development funds. Though their assessment about specific policies differ somewhat, both of them underline the need of *ensuring the stronger participation of the Roma* in deciding about developmental source use.

At the first glance, a different perspective, a post-socialist approach is suggested by Francesca Stella whose book about *Lesbian Lives in Soviet and post-Soviet Russia* is reviewed by Judit Takács. Stella, however, understands *post-socialism in a critical context*, opposing her micro-level ethnographic approach with that of mainstream transitology. Takács argues that this critical post-socialist perspective indeed makes the integration of queer theory into empirical social scientific research possible, thus paving the way for post-queer social scientists.

The other book review of this issue of IEEJSP is prepared by Ilgvars Jansons about *Chasing Warsaw* (edited by Monika Grubbauer and Joanna Kusiak). The articles of this edited volume *address the particularly intense dynamics of urban change in Warsaw since 1990*. The approach of the authors of this book is similar to

the original articles of *Intersections. East European Journal of Society and Politics*: they investigate patterns of change and continuity in post-socialist Warsaw in the context of global urban changes, but going beyond post-socialist area studies perspective.

Finally, the individual article of Ervin Csizmadia explores some specific features of the *Hungarian democratic opposition movements in the late Kádár-era*. The author overviews the role of international environment as well as the programme and strategy of the Hungarian opposition. The study argues that in addition to these well-documented effects, the *informal concept of organisation and network-building* may also play an important role in the flexible political adaptation and the subsequent success of the democratic opposition in Hungary.

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