

## ARTICLES

**GEOGRAPHICAL MARGINALITY AS A RESEARCH TOPIC  
IN SLOVENIAN GEOGRAPHY**

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ABSTRACT

**Geographical marginality as a research topic in Slovenian geography**

This text gives a brief overview of the research work in the field of geographical marginality in Slovenia and presents some of the views and findings of the author about geographical marginality and about marginal areas in Slovenia. The topic is relatively new in Slovenia as well as elsewhere and not many Slovenian authors directly contributed to it. There are certain dilemmas and unanswered questions that we point out as signposts for future investigation.

KEY WORDS

geographical marginality, regional development, Slovenia

IZVLEČEK

**Geografska marginalnost kot raziskovalna tema v slovenski geografiji**

V besedilu je podan kratek pregled raziskovalnega dela na področju geografske marginalnosti v Sloveniji. V njem predstavljamo nekaj pogledov in ugotovitev avtorja o geografski marginalnosti in o obrobni območjih v Sloveniji. Tema je razmeroma nova tako v Sloveniji kot tudi drugje in le redki slovenski avtorji so do zdaj neposredno pisali o njej. Izpostavili smo tudi nekatere dileme in neodgovorjena vprašanja, s katerimi smo želeli nakazati smeri prihodnjih raziskav na tem področju.

KLJUČNE BESEDE

geografska marginalnost, regionalni razvoj, Slovenija

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## 1 Introduction

In the presentation of International Geographical Union's (IGU) commission C08. 27. Marginalization, Globalization, and Regional and Local Responses (Internet 1) the author of this text stated on the IGU website: »There is no simple and certainly no unique answer to what geographical marginality is. Every annual meeting of the commission reveals that there are many different views and no consensus. It almost seems that marginality is something you can feel, but cannot define.« There are at least two reasons for this quotation. Firstly it points out the basic dilemma of geographical marginality as a research topic in geography and secondly it communicates that the above mentioned IGU commission and its predecessor commissions and study group introduced and developed this field of research. Our aim in this text is to present the main contributions made by Slovenian geographers considering geographical marginality and to present some of the author's viewpoints and findings published in different papers, articles and book chapters. An important goal according to that is to define the state of the art of geographical marginality research in Slovenia in the first decade of the new millennium.

For the purpose above we used the following methodological approaches: The review of literature and the synthesis of partial conclusions as well as a comparative study. This text is therefore a summarized overview of author's research accomplishments in the field of geographical marginality.

## 2 Contributions of Slovenian authors on geographical marginality

Slovenian authors that actively participated at annual conferences of IGU commissions (study group) on geographical marginality presented different topics and different views of marginality. Vojvoda (1994) even defined Slovenia as a »marginal state«. In the beginning of the nineties Slovenia:

- had just separated from Yugoslavia,
- went through a severe economic crisis at the fall of socialist system and Yugoslav market,
- was outside EU and still far from becoming a part of it,
- had limited or no contacts with the rest of former federation due to war, at first in Croatia and then in Bosnia and Herzegovina, or due to political dispute with Serbia and Montenegro.

Due to these facts we cannot claim that Vojvoda's statement was inaccurate.

Vojvoda once again defined Slovenia as marginal by claiming that »within the framework of Europe as a whole, the Republic of Slovenia is politically and economically marginal« (Vojvoda 1996, 185). He also stated that there are two large regions within Slovenia that may be classified as marginal (Alpine and Dinaric). For these two he specifies the natural conditions as the reason for their marginality. In addition he also classified the whole hilly area as a marginal region of Slovenia too. The reason, in his opinion, is the ongoing process of depopulation that takes place there. The marginality of the mountainous region is demonstrated by the fact that »no matter how great the input is, the agricultural productivity of such regions reaches at most only 60% of lowland production«. His paper dealt with the developmental issues of the Bohinj basin in central part of the Julian Alps where he mainly analyzed the changes in agriculture of the area in the post World War II period with special regard given to the grazing and shrinking of mountain pastures.

Belec is another author that was active in the nineties and at several conferences he presented the following topics:

- the problem of marginality within the context of regional development (Belec 1996),
- marginality issues in Slovenia with regard to borders and sustainable regional development in border areas (Belec 1997a) and
- the problem of geographical marginality with regard to the position of Slovenia within Europe (Belec 1997b).

He evidently focused his attention mainly on the question of regional development and primarily observed geographical marginality from an economic point of view.

His work was in a way continued by Mesec, who also wrote about the development of border regions with regard to cross-border cooperation as one of the tools of EU developmental policy (Mesec 2007). Similar to Vojvoda, she also presented a case study of a micro region Breginjski kot in pre-Alpine hills along the Slovenian-Italian border (Mesec 2005).

The author of this text wrote about marginality from different viewpoints, usually with use of case studies from Slovenia. As Belec and Mesec he also wrote several texts about marginality in border areas (Pelc 2005; 2007; 2008b; 2009b; 2010a). Another group of his texts deals with development with special regard to rural areas and programme of integral rural development. Some of the texts have more theoretical character (Pelc 1999; 2009a; 2010b), one discusses amateur cultural activities and marginality within the context of globalization (2008a), one examines suitability of demographic indicators of geographic marginality (2006) and one discusses the terms marginality and peripherality in Slovenian language and presents the field of geographical marginality research to Slovenian audience (Pelc 2004).

Some other Slovenian authors also wrote about similar problems as those mentioned above, but they did not directly put them into the context of geographical marginality. Klemenčič, Lampič and Slavič (2008) published a book about (non)vitality of Slovenian peripheral rural areas. The main topic is rural development, similarly as in many studies from the field of geographical marginality. The areas analyzed could also be defined as marginal although the authors preferred to define them as peripheral. We suppose that this way they only considered their geometrical position and avoided the concept of geographical marginality.

Slovenian contribution to the research of geographical marginality globally is certainly not insignificant. It covers different topics and gives several insights into considerations of marginality. Similarly to researches from the rest of the world, there are no ultimate findings about the definition of geographical marginality and the extent of geographically marginal areas. The difference with geographers from some western nations is that the focus of Slovenian researchers is always Slovenia and never marginal regions on a global scale (in Africa or Asia). Slovenians tend to present Slovenia and geographical marginality from Slovenian point of view rather than to explore geographical marginality worldwide. Nevertheless we may conclude that Slovenians contribute constantly to the work of IGU commission on marginality even though there is no systematic and complex research of this field in Slovenia. Therefore we do not have a complete and clear picture of marginality and marginal areas in Slovenia. However, this is no different than in other countries. There are plenty of partial insights, but no wider general overview of all of the marginality manifestations in certain region at any scale.

### 3 Geographical marginality from Slovenian perspective

In this chapter we are trying to synthesize different findings previously presented by the author. The question what geographical marginality really is was discussed at many annual meetings of the IGU »marginality« commission. Leimgruber (2004) stated that it cannot be defined without putting it into a certain perspective. He offered three possible concepts: economic, political and social (including cultural). He also distinguished marginality from peripherality. Within the upgraded Centre-Periphery model there are two kinds of peripheries that are marginal (Leimgruber 2004, 38–45): the »isolat« (isolated region) and the »angle mort« (the lost corner). They cannot really be attributed to the rest of the periphery even though they are a part of it. Another important issue is the perspective that we use when we observe a certain region. Something that is marginal from an economic point of view is not always marginal from a social or a cultural point of view. We can say that there is not just one and ultimately correct definition of marginality.

Our understanding of marginality (Pelc 2006) starts with the meaning of the word marginal. Margin has several meanings. One of them is »a blank space round a printed or a written matter on the page«. We believe that the difference between margin and its antonym (the written matter) is essential. Marginal according to our understanding is something that is on the margin. This means that it is essentially different than the rest of the page. The role of the margin is mainly esthetical while the role of the rest of the page is to bring the information. We can add some remarks on the margin, but this kind of information is completely different than the one in the printed text. These remarks are never a part of the text even though they correct or comment it. In a correspondence with that marginal regions are those that are essentially different from the rest of the regions within a certain macro-region, nation or continent. This does not mean that they are without any ties with other non-marginal regions. Different kind of interactions and interdependencies are always present to a certain extent. We therefore believe that marginal regions are not necessarily completely isolated from the central ones. In a modern globalized world an »isolat« (isolated periphery that is completely out of economic, social and cultural system of its central neighborhood) is in our opinion more of a theoretical concept than a possible reality.

We believe that the essential characteristics of marginal regions are:

- peripheral,
- substantially different than non-marginal regions,
- underdeveloped,
- socially and culturally excluded,
- politically unimportant and uninfluential.

Any of the above characteristic is difficult to measure. When we use different indicators for the same area they usually show a different degree of lagging behind the national average. Very often the appropriate indicators are not available at the desirable scale. Measuring marginality becomes even more difficult when we switch from an economic to a social perspective. Finally we usually do not have enough means to do an in-depth research.

When we first tried to establish where marginal areas in Slovenia could be, we used a rather provocative approach. We decided that we will use only one indicator. That was the share of illiterate inhabitants according to the population census of 1991 (Pelc 1999). Average illiteracy percentage in Slovenia in the 1990ies was very low (0.7%). We assumed that settlements with considerable share of illiterate inhabitants are so different that we can consider them as marginal. In 1991 there were 38 settlements with more than 100 inhabitants with the share of illiterate people exceeding the average for three standard deviations and more. Villages with the highest shares of illiterate inhabitants had a considerable share of Roma population (Hudeje, Dobruška vas with the highest shares and Černelavci with the highest absolute number). The chosen indicator showed us a marginal group of population that lives a different life compared to the rest of the population. Permanent settlement for Roma in Slovenia is something that started mainly in the second half of twentieth century and for many only at the end of it. Roma children are now going to Slovenian schools but many of Roma adults did not go to school and did not learn to read and write. Most of them have no proper profession. One of their typical occupations is collecting metal waste and selling it. Few of them are regularly employed and in many households social transfers provided by the government are often the main regular source of income. Their lifestyle is not well understood by the majority and there is very common stereotype that the Roma are paid for doing nothing and are not trustworthy. We can consider them as the most marginalized group in Slovenia and consequently we can consider the places where they live as marginal. However, they do not settle larger rounded areas. They are dispersed between certain settlements mainly in north-eastern part of Slovenia (Prekmurje) and in south-eastern part (Dolenjska, lower part of Sava valley). We therefore believe that in case of Roma settlements (parts of settlements with Roma population) we have to deal with marginality, but mainly from a social (sociological) point of view and not so much from a geographical.

All other groups of settlements with extremely high shares of illiterate inhabitants were located in remote hilly areas with predominance of older population. Obviously the reason was depopulation. Young



STANKO PELC

Figure 1: The nature is »taking back« former farmland in Kostelsko region along the border with Croatia.

people moved to cities and suburban settlements and only older people with low level of education or even without it remained. These settlements were in hilly countryside in the hinterland of Koper alpine valleys in northern Slovenia and in high hilly area on the left bank of Drava river along Austrian border.

Another attempt of defining geographical marginality of Slovenian regions was made with the use of demographic indicators at the level of municipalities (Pelc 2006). Rather fragmentary analysis showed that available demographic data does not offer a possibility for the creation of reliable demographic indicators of geographical marginality. We used 5 demographic characteristics to calculate a simple aggregated »coefficient of demographic marginality« based on the relative value of an indicator according to national average. The coefficient ranges from  $-1$  to  $+1$ . The highest calculated coefficient was  $0.6$  and the lowest  $-0.8$  (municipality Trnovska vas in low hilly area in north-eastern Slovenia).

We concluded that the available demographic data for Slovenian municipalities cannot be used as a set of reliable indicators of geographical marginality. They only indicate municipalities that show more marginal characteristics than others. Undoubtedly peripheral (marginal) municipalities Osilnica, Kostel, Loška dolina and Loški potok have some unexpected demographic characteristics. In 2002 all four and in the period 1999 to 2002 three of them had a positive net migration. Municipality Kostel even had one of the highest rates (average annual rate: 18 per 1,000 inhabitants). On the other hand even undoubtedly central municipalities may have quite negative demographic characteristics.

Our researches showed that it is rather difficult and to some extent confusing to use the concept of marginality in Slovenian (European) context. There certainly are peripheries, depressed and underdeveloped places and regions, but the interaction between such areas and regions on one side and the developed central ones on the other, is always and everywhere present at least to certain extent (commuter flows, supply, migration, recreation etc.). In Slovenia (as in most of the EU) it is most unlikely to find an area that could be defined as »*Angle mort*« or »isolat«. At least if we want to define it with exact measurable criteria. There are some relatively isolated areas with few interactions with centers and with weak economic and demographic potential. Therefore we may consider them as marginalized. However, we believe that it is not appropriate to define them as marginal. It is easier to observe the process that leads to marginality (marginalization) than marginality itself (Pelc 2010a).

As the dilemma about the exact nature of geographical marginality by our opinion has never been resolved, we continued our reflection of the term with the statement that »marginality is a state of mind«. It has often been heard (Leimgruber 1994, 8; 2010, 6–7; Pelc 2010a, 97) in the discussions about geographical marginality. Marginality as a state of mind is not something that we can measure or assess. It is simply »something that is present within the population of a certain place«. It is »the sensation of

marginality«. It may occur in many forms, just as the sensation of a few or of many people in a certain area. There may be outer objective reasons for it and inner subjective as well. Marginality regarded this way may fit into the behavioral paradigm well.

From a geographical point of view the sensation of marginality has to be closely related to geographical position. This position has to be at the margin in regard to the centre of a certain activity (political, cultural, economic, demographical, ecological etc.). There may be different reasons why somebody does not participate in a desired activity, but geographical position is very likely always among them. Geographical marginality may therefore be considered as: physical distance that one cannot overcome because of the constellation of socio-economic factors and his position in geographical space. According to the scale this distance differs radically.

When people feel that they are not allowed to participate in a certain activity because of their geographical position this may result in a sensation of marginality. This may happen both in peripheral and in central areas. In the 1990ies Maribor (the second most important centre in Slovenia) suffered severe economic depression while Ljubljana became a capital of a new nation and gained new opportunities. Therefore a »sensation of marginality« occurred in Maribor and in some other Slovenian towns (Pelc 2010a, 98). Many people there were convinced that their town is lagging behind because of Ljubljana and its central position. The feeling that because of its geographical position their region cannot participate in economic development was very common at that time. We considered that as a »sensation of geographical marginality«. That does not mean that Maribor should be considered as geographically marginal. However, the sensation of marginality may be a clue that shows the emergence of basic conditions for marginalization.

In case of peripheral areas the sensation of marginality is undoubtedly the expression of an advanced process of marginalization. Such areas have unfavorable economic and demographic characteristics, poor accessibility to working places as well as to all basic services. In case of border areas the process of marginalization may even be accelerated and the sensation of marginality strengthened.

We tried to establish whether there is a sensation of marginality in remote peripheral areas along the Slovenian border with Italy in hilly and mountainous relief. Conditions for profitable market ori-

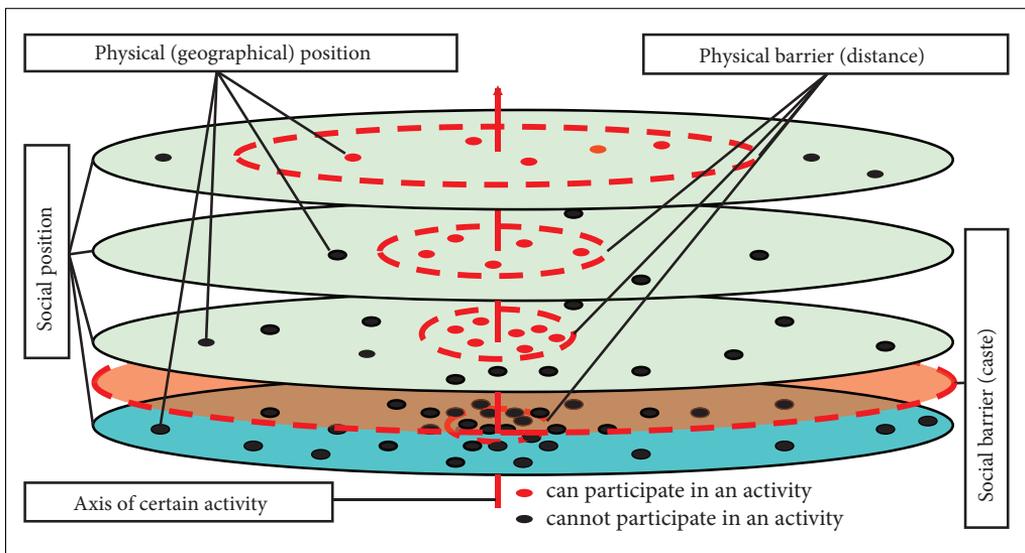


Figure 2: Ability for participation in an activity with regard to physical and social barriers – nonparticipation in many activities may produce a sensation of marginality (Pelc 2010a).

ented agriculture there are unfavorable and there is also a lack of good accessible working places. Therefore the depopulation and change of demographic structure were expected consequences. On the other side the natural beauty of these areas makes them attractive for part time dwellers (either by emigrants from the area or urban people from other parts of Slovenia and the EU). The border is no longer an obstacle and enchantingly beautiful Soča valley is literally lying at ones feet. From this point of view these areas are central because their peripherality is filled with natural beauty and recreational opportunities. This may be the reason that even people from most depopulated village in this area (Robidišče) did not express any kind of sensation of marginality.

Natural beauties and environmentally well preserved peripheral areas bring us to the discussion on the problem of environmental centrality and marginality (Pelc 2010b). We believe that there are two possible points of views of environmental importance. One is the 'naturocentric' and the other is the 'anthropocentric'. The second one is appropriate when we talk about environmental centrality. In this case it is in close connection with the accessibility of environmentally well-preserved areas and with their attractiveness and importance for the (urban) population. Centrality in this case is the degree to which these areas serve to its neighboring urban centers (agglomerations).

Environmentally marginal areas are supposed to be completely opposite of the one described above. In 1980ies an example for that could be Slovene »Dead valley« (Žerjav in Meža valley in northern part of Slovenia, 55 km northeast of Ljubljana) that was damaged by the extraction of lead ore and the refining of lead. It is now being revived again since the refinery has been closed. In global context the best example is probably Chernobyl after its nuclear disaster.

With the last patch in a patchwork of our research of geographical marginality we want to present another viewpoint that marginality may be observed from. We investigated the relation between globalization and marginalization with special regard on amateur cultural activities and their importance for preservation of national identity (Pelc 2008a). These activities have a long tradition in Slovenia and we stated that they are equally important today as they used to be in the past before the independence when Slovenian culture and identity was under pressure of dominant nationalities within the Hapsburg Empire and Yugoslavia. Trough mass media popular culture mainly of USA origin endangers national cultures and languages worldwide. We consider this to be a cultural marginalization and amateur cultural activities tended to be an important supporter of national culture and identity. However, they are already under the pressure of global trends and cultural marginalization is on its way.

If we put all the above fragments of marginality research together we get a picture with many missing parts, but the least that we can see is that it is better to use term marginalized than marginal. It is easier to find different characteristics showing marginalization of an area or social group than to find exact indicators of geographical marginality. An area or region may show marginal characteristics from some aspects while from other it may be even central. Slovenia is too small to fit into ideal scheme of centre-periphery-marginal areas, but that does not mean that it has no marginalized regions.

## 4 Conclusions

Research of geographical marginality in Slovenia is relatively sporadic and unsystematic. Only the author of this text has continually researched different topics from this field. However, his approach was also not systematic. Nevertheless we can conclude that different approaches to establish what and where marginal areas (regions) are did not bring a positive result. Slovenia is small and travelling distances to regional centers by car are relatively short. We can state something similar for the distances between regional centers and the capital. It is therefore most unlikely to have a peripheral region that has to live on its own with few contacts with the center. On the other hand Slovenia is integrated into EU and is neither at its periphery neither it is a marginal member.

In our opinion the concept of geographical marginality in the Slovenian context can only be implemented to describe the process of marginalization that may be present in certain parts of the country. The concept is a useful tool for geographical research of problematic regions as it gives us a possibility to use different perspectives. We believe that further investigation of factors of different kind of marginalization at the regional level has to be done in future research of this field. The presented findings and views above are a modest contribution to the worldwide research of geographical marginality and the basis for further upgrade of research in this field in Slovenia.

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