Y. A. Dobrolyubska
ORCID ID: https://orcid.org/0000-0002-3564-854X
Dr. of Science in Philosophy, Full Professor,
Department of Ukraine History, South Ukrainian National
Pedagogical University named after K. D. Ushinsky

MODERN TYPOLOGY OF MARGINALITY IN SOCIAL AND CULTURAL SPACE

Problem Statement. The founders of the concept of the marginal personality, R. E. Park [9], and later E. Stonequist [11], considered marginality exclusively in the sociocultural aspect, believing that a "marginal person" is a certain type of personality with characteristic behavioral forms. For various reasons, the "marginal person" finds themselves on the periphery of two or more cultures and (again, for various reasons) is unable to fully integrate into any of them. In the early 20th century, reasons for being in a marginal situation (or marginal status, as it is commonly referred to now) could include racial or ethnic heterogeneity of origin – "racial hybrids": Eurasians in India, "colored" individuals in South Africa and Jamaica, mulattos in the United States, Indo-Europeans on the island of Java, mixed population in Brazil, and so on. Or "cultural hybrids," for example, migrants until they integrated into the local culture or assimilated [9]. These could also be people who formally changed their status, were elevated by social elevators – parvenus, or those declassed, downgraded by the same social elevators; however, regardless of the direction of social mobility, they failed to adapt to the new social or sociocultural situation and "somewhat," "phantomly," and partially remain in their past lives.

Robert E. Park noted not only the presence of cultural contact but also cultural conflict in the emergence of this type of personality. According to Park, a marginal person is someone whose fate condemns them to live in two societies and in not just different, but antagonistic cultures. This antagonism existed both in societal relations and at the level of individual personality, both outside and within the marginal person. On one hand, it was a product of cultural conflicts caused by conquest, invasion, and migration. In Park's early description of globalization, he suggested that the "tremendous expansion of Europe in the last four hundred years" brought everywhere the interpenetration of nations and the merging of cultures, reflected in the marginal person as a "type of personality, if not entirely new, at least particularly characteristic of the modern world." Thus, it was an "effect of imperialism" and a "manifestation of the process by which civilization grows at the expense of earlier and simpler cultures"

[9, p. 20]. On the other hand, the marginal person themselves was a microcosm of the cultural context, appearing in their consciousness as a "conflict" of a divided "self," the old and the new "self" [9, p. 21].

The goal of the article is to systematize new trends in the study of the phenomenon and phenomenology of marginality, the reasons and conditions for marginalization, as well as to construct a typology of marginality based on the analysis of how individuals or groups perceive, relate to, and exist within different cultural spaces in terms of scale and content.

Analysis of recent research and publications. Currently, the research field dedicated to marginality and marginalization has significantly expanded and, at the same time, shifted towards social-political, economic, geographical, ecological, and other studies [6, 10]. Firstly, empirical research is becoming increasingly multicultural and interdisciplinary. Secondly, it is necessary to clearly define the concept of marginality and formulate the specifics of its phenomenology. This includes distinguishing the concepts of discrimination and marginalization, which are unjustly conflated in contemporary research, and at least partially returning to the classical understanding of marginality, which includes a personal dimension, i.e., psychologizing this concept [2, 4]. The new typology of marginality serves as the basis for the development of a future specialized diagnostic toolkit that allows researchers to identify similarities and differences in the experience of marginality among people within different scales and types of cultural spaces during empirical studies.

In the world, processes of globalization and glocalization are simultaneously and dialectically occurring (in extreme manifestations, this is cultural and economic isolationism, provincialism, political separatism) [4, p. 14]. Presumably, in most parts of the world, processes of globalization currently prevail. If opposite tendencies manifest in any country or sphere of societal existence, these processes are perceived as marginal, and people supportive of such a protest movement are essentially seen as marginal. Conversely, in the few countries where mainstream trends lean towards a return to roots and traditions, there is a negative

attitude towards unification in all or some spheres of life. Advocates of globalization may face ostracism and may acquire a marginal status in the perception of the majority [3, p. 2–4].

Thus, there may be a powerful subjectivization of the concept of marginality because:

a) those to whom this negatively colored label is applied may not feel or experience the psychological problems typically associated with a marginal personality;

b) processes and phenomena considered marginal by some may be perceived completely differently by others.

In the definitions and descriptions of the process and phenomenon of marginality, the personal dimension is practically completely ignored [1, p. 247]. The main emphasis is placed on social, economic, political, cultural, and other factors that determine an individual's or group's presence in a marginal situation [2, p. 388]. Even resistance to a marginal situation or status is presented as a general social phenomenon rather than a personal or group achievement determined by the subjectivity of the individual or group.

Recently, marginality is increasingly positioned as uniqueness, incapacity, and furthermore, it is defined by the vulnerability of some individuals, groups, cultures, compared to others. Marginalized individuals or groups are those who are socially, economically, politically, and legally ignored, excluded, or neglected, and therefore, they are vulnerable and incapacitated [7, 8]. By definition, they struggle for access (social and spatial) to resources and full participation in social life [1, 2, 3, 10].

Results. In our opinion, the recent statement is not entirely accurate because resources for such a struggle may not exist, including belief in such a possibility, motivation to fight, and more. For example, in the situation of the transition from configurative culture to prefigurative culture, observed in contemporary societies, there is marginalization of older people. Even in communities where respect for elders and reliance on their experience have always existed at the level of values and traditions, ageism is a form of discrimination. However, in a psychological sense, ageism can also be called marginalization, as the mental state of many elderly individuals is highly contradictory. On one hand, there may be frustration as they perceive their passport age (defined by society as pre-pension, pension, or "age of survival"), and this is sad. On the other hand, they feel like entirely young people with corresponding desires, and often, capabilities, especially if their health does not hinder such self-perception. At the same time, socio-cultural stereotypes are very painful, as they try to exclude them from competitive situations: in employment practices, in the system of social communications (for example, the current

situation of the pandemic is a direct form of ignoring and exclusion, partially masked).

In general, it is indicative of how the contradictions characteristic of marginality as a specific state are felt on a personal level in situations of age transitions. One of the key experiences typical for adolescents is the "feeling of adulthood," that is, self-perception and self-relationship as an adult, while simultaneously understanding that adults perceive you as a child, leading to the desire to protest but also doubts about one's own adulthood. Of course, it is not news that situations of transition from childhood to adulthood, from youth and adolescence to maturity, and then to old age assume not momentary but rather a process with a probable intermediate phase in terms of the content of experiences corresponding to the state of marginality. One can further explore these reflections and imagine any crisis states as transitional: a person is still experiencing a certain mental state, but to some extent is already ready for another or partially already in it.

The social approach focuses on the relevant components of harm, deficiency, and exclusion of marginal individuals and groups regarding access to resources and participation in the decision-making processes of societal significance. This includes discrimination based on demographic, ethnic, cultural-linguistic, socio-political, and economic grounds [2, p. 389]. The emphasis is on understanding the fundamental causes of inequality, social injustice, poverty, and deprivation [6, p. 17–19].

The spatial dimension of marginality is primarily grounded in the characteristics of location (geographical or physical marginality), the state of natural resources, and the distance from the centers of modern civilization or poorly coordinated with such centers (geographical or physical marginality) [5, p. 11–13]. People and groups residing in certain regions or areas may simply lack access to resources. However, literature provides examples where such "marginal" regions become centers, for instance, in tourism with much better access to basic infrastructures and services (healthcare, communication, education, and transport) than most other areas in the country [8, p. 288–291].

Like any social phenomenon, marginality carries ambivalence in the continuum of space-time (past-present-future). Marginality is considered a "multidimensional phenomenon in the sense that a specific individual can be simultaneously integrated with one or several centers, while being marginal to one or several other centers" [4, p. 11–12]. For example, an individual can be a citizen of a developed and successful country while simultaneously representing an ethnic or religious minority.

Being marginal means being on the edge of one or several social or spatial systems due to a lack of resources or opportunities to change this marginal

situation. However, the understanding of resources and opportunities depends on scientific disciplines, theories, concepts, and models. In economics, it may refer to the resources of the state or international organizations; in politics, it may relate to the possibilities of transforming the political system or changes in power structures, and so on.

We consider these resources and opportunities to be the characteristics, properties, or qualities of an individual or group (group favoritism, cohesion, subjectivity, risk propensity, and other group or individual phenomena).

The new typology of marginality can be constructed based on the analysis of how individuals or groups are perceived and the relationships with them in connection with the existence of different in scale and content social and cultural spaces:

1. Planetary social and cultural space, encompassing all of humanity. Recognized by countless people, representatives of various cultures, these mythical or real evildoers are denied recognition as human beings by cultural traditions, myths, religion, history, or public opinion. They exist beyond the realm of good, yet formally belong to the human race, navigating an antagonistic space in the binary opposition of "humans" and "non-humans." Examples include biblical evildoers such as Cain, Joseph's brothers, Sodom residents, the pharaoh of the exodus, Haman, Goliath, Ahab, Jezebel, Judas Iscariot, Herod, and others. Throughout history, not only individuals but also groups, like lepers, sexual minorities, heretics, witches, and Jews in medieval Europe, have been marginalized [8, p. 292]. In the modern and contemporary periods, similar examples abound.

The marginality of historical and/or mythical evildoers is conditional, emphasizing the essence of this concept. Ratings of real-life figures today are diverse, with some evildoers being perceived ambivalently by different segments of society, adherents of certain ideologies, and political groups. For instance, figures like Genghis Khan, Hitler, Stalin, Mao Zedong, Pol Pot, Attila, the Grand Inquisitor Thomas Torquemada, Caligula, Nero, Herostratus, and others are viewed ambivalently by different layers of society [7].

Marginality is discussed as a psychological phenomenon, focusing on perception and attitudes rather than social, political, or economic markers of marginal status. It is understood that figures like Attila or Caligula were not considered marginal in their own perception or that of their contemporaries. They did not lose social ties with their group; they did not impoverish or fall out of the system. On the contrary, they stood at the forefront of the system. Therefore, marginality, in this case, is an epiphenomenon of historical diagnosis or historical, moral, political interpretation, determining the

place of evildoers on the boundary between human and non-human.

2. Social and cultural space of a state or political nation. Within this space, evildoers may be considered universal or historical, with some seen as "one's own" within the borders of a particular state. For example, criminals whose infamous reputation does not extend beyond their country. In the Soviet Union, this included Chikatilo and other maniacs and murderers. There are also so-called marginal politicians, although this title is fluid, and marginal status can smoothly transition to the position of elite politicians. In Europe, there is a trend of right-wing parties moving from marginal status to political elite – they are now entering parliaments.

3. Social and cultural space of an ethnic, religious/confessional community, as well as subcultures, professional groups, etc.

Representatives of ethnic minorities, whether recent migrants or those who have overcome this status over many years of living in the territory of an ethnic majority or "titular nation," may face discrimination in various spheres of life – social and economic. However, they can occupy their niche in other areas and not feel marginalized. For example, they may successfully develop private trade, public catering, transportation services, work as builders or janitors, and be recognized as necessary and useful members of society. They do not feel marginalized, especially if social elevators allow the next generations to move horizontally or vertically (upward, of course).

A special case involves subcultural groups or individuals belonging to them (with corresponding identities) or being categorized into such groups by others (regardless of identity). For instance, members of the untouchable caste in Hindu societies (Dalits), certain gangs/criminals, drug dealers, transgender individuals, some ethnic groups (such as Roma), or religious communities (identified by canonical denominations as sects) might be financially prosperous and psychologically self-sufficient but can still face stigma and consequent marginalization.

Indicators of marginality can include ideological beliefs and political preferences. For example, in youth environments, ideological dogmas of communism, along with corresponding political engagement, or conversely, right-wing radical views, are often considered marginal. This occurs because the majority tends towards either political passivity and electoral absenteeism or a desire to support new political movements that oppose the ruling and pro-establishment forces. These movements are characterized less by a program of constructive transformations ("left" or "right") and more by harsh criticism of any existing power structures, decisions, and actions. It's about embracing the new and radical, against

everything old and dull! It should be acknowledged that this approach is more characteristic of capitals and certain megacities, whereas in provinces and small settlements, it is less prevalent.

4. Social and cultural space of a lineage or family clan, an individual family. In this case, marginality is also a boundary between recognition of one's own and the acknowledgment of its unsuitability and negativity. There can be at least two variants of causality and manifestation of marginality. Firstly, rejection by the lineage, clan, or family: "There's a black sheep in every flock (family)." Secondly, situations may arise, or individuals may disappoint in family (lineage, clan) values, beliefs, and behavioral patterns. This involves the formation of a so-called negative identity and the corresponding process of self-rejection from the family system: a highly painful process filled with conflicting emotions and turmoil.

Conclusions. Therefore, in studying marginality, several clear tendencies can be identified:

1. Globalization Processes. Prevailing in different regions of the world, shape the attitude of their inhabitants towards supporters of the opposite process of glocalization, whether from other regions or their compatriots. Those who resist progress are considered marginals. In regions where a return to traditions is mainstream, negative attitudes towards leveling, unification of needs, and values on a global scale – resistance to globalization – also label its supporters as marginals, and in this case, as traitors.

2. Subjectivization of Marginality. The concept of marginality is increasingly subjective. Processes and phenomena perceived as marginal by some people may not be seen as such by others, and those who are marginalized may not feel marginalized at all and may not experience the typical psychological problems associated with it.

3. Avoidance of Personal Dimension. There is a strong and persistent trend in definitions and descriptions of marginality to almost completely avoid or ignore the personal dimension, particularly the personal determinants of marginality as a psychological state. The emphasis is placed on socio-economic, political, cultural, and other factors that determine an individual or group's marginalized situation.

4. Marginality as Exclusion. More often, marginality is conceptualized as exclusion, incapacity, and is defined by the vulnerability of some individuals, groups, or cultures compared to others. Ignoring the personal dimension, i.e., the psychological state of individuals, often leads to discrimination being accepted, described, and analyzed as marginalization, and the discriminated individuals or groups are automatically considered marginal.

5. Shift to Prefigurative Culture. In contemporary societies, there is a sharp transition from a configurative culture to a prefigurative one, leading to ageism as a form of discrimination against the elderly. The psychological content of such discrimination can be marginalization if it is experienced as a contradiction between the frustration associated with self-perception of one's age, status, and desires and the societal view of these aspects.

6. Contradictions as Markers of Marginality. Deeply experienced contradictions, characteristic of age-related crises and transitions, are markers of marginality, as individuals simultaneously exist within the boundaries of two or more psychological states.

7. Social and Spatial Approaches. Marginality is most often defined and described within the frameworks of social and spatial approaches. The latter allows for building a typology of marginality based on the analysis of how individuals or groups perceive and relate to others in the context of various cultural spaces: planetary, the space of a state or political nation, ethnic or religious/ denominational community, subcultures, professional and other communities, the social and cultural space of a lineage or family clan, an individual family.

8. Proposed Typology. The proposed typology can be complemented in the future with an original diagnostic toolkit, enabling the identification of similarities and differences in the experience of marginality among individuals within different social and cultural spaces, varying in scale and nature.

Bibliography

1. Anderson J., Larsen J. E. Gender, Poverty and Empowerment. *Critical Social Policy*. 1998. №18 (2). P. 241–258.

2. Brodwin P. Marginality and subjectivity in the Haitian Diaspora. *Anthropol Q.* 2003. №76 (3). P. 383–410.

3. Davis B. Marginality in a Pluralistic Society. Eye On Psi Chi. *The International Honor Society in Psychology*. 2004. №2 (1). P. 1–4.

4. Dunne R. J. Marginality: A Conceptual Extension. *Marginality, Power, and Social Structure.* Elsevier, Oxford, 2005. Vol 12. P. 11–28.

5. Gatzweiler F. W. Marginality: Addressing the Root Causes of Extreme Poverty. *ZEF Working Paper Series*. 2011. 19 p.

6. Ghana S. Marginality: Concepts and their Limitations. *NCCR North–South Dialogue*. №12. 24 p.

7. Larsen J. E. Who Cares about and for Marginal People? *Danish Social Science Research Council.* November 23, 2004. 20 p.

8. Leimgrube W. Between Global and Local: Marginality and Marginal Regionsin the Context of Globalization and Deregulation. Ashgate Publishing Limited, GowerHouse, England, 2004. 321 p.

9. Park R. E. Society, collective behavior, news and opinion, sociology and modern society. *Glencoe: Free press.* 1955. P. 13–21.

10. Perlman J. The Metamorphosis of Marginality: Rio's Favelas 1969. *Paperpresented to World Bank Conference* May 2, 2002. 36 p.

11. Stonequist E. V. The marginal man: A study in personality and culture conflict. N.Y.: Russell & Russell, 1961. Ch. 7. P. 159–174.

Анотація

***Добролюбська Ю. А*. Сучасна типологія маргінальності у соціальному та культурному просторі.** – Стаття.

Глобалізаційні процеси, що переважають у різних регіонах світу, визначають ставлення їхніх жителів до прихильників протилежного процесу глокалізації як з інших регіонів, так і до своїх співвітчизників: вони є маргіналами, що опираються прогресу. У регіонах, де мейнстримом є повернення до традицій, негативне ставлення до їх нівелювання, уніфікації потреб та цінностей у світовому масштабі, тобто опір глобалізації, її прихильники також сприймаються маргіналами. Причому в останньому випадку ще й зрадниками. Відбувається суб'єктивізація поняття маргінальність: процеси та явища, які сприймаються і визнаються одними людьми як маргінальні, іншими не вважаються такими, а люди, що маргіналізуються, можуть зовсім не почуватися такими і не переживати характерних для цього психічного стану проблем. Сильна та стійка тенденція у визначеннях та описах процесу та феномена маргінальності полягає в тому, щоб практично повністю уникати чи ігнорувати особистісний вимір, зокрема, особистісні детермінанти маргінальності як психічного стану. Основний акцент робиться на соціально-економічні, політичні, культурні та інші чинники, які зумовлюють перебування людини чи групи у маргінальній ситуації. Все частіше маргінальність концептуалізується як виключеність, знедоленість, визначається вразливістю одних людей, груп, культур порівняно з іншими. Таким чином, ігнорування особистісного виміру, тобто психологічного стану, переживань людей, нерідко призводить до того, що дискримінація приймається, описується і аналізується як маргіналізація або люди, що дискримінуються, і групи автоматично вважаються маргінальними.

Маргінальність найчастіше визначається та описується в рамках соціального та просторового підходів. Останній дозволяє вибудувати типологію маргінальності на підставі аналізу сприйняття людини чи групи, ставлення до особистості чи групи у зв'язку з існуванням різних за масштабом та змістом культурних просторів: планетарного, простору держави чи політичної нації, етнічної чи релігійної/конфесійної спільності, субкультурних, професійних та інших спільнот, груп, родового чи сімейного клану, окремої сім'ї. Запропонована типологія в перспективі може бути доповнена оригінальним діагностичним інструментарієм, що дозволить визначити подібності та відмінності у переживанні стану маргінальності людьми, що знаходяться всередині різних за масштабом та характером соціальних та культурних просторів.

Ключові слова: маргінальність, культурна маргінальність, глобалізація, глокалізація, суб'єктивізація, соціальний простір, культурний простір.

Summary

***Dobrolyubska Y. A*. Modern Typology of Marginality in Social and Cultural Space.** – Article.

Globalization processes prevailing in different regions of the world shape the attitudes of their inhabitants towards supporters of the opposing process of glocalization, both from other regions and their compatriots. In regions where a return to traditions is mainstream, negative attitudes towards the leveling, unification of needs, and values on a global scale, i.e., resistance to globalization, categorize its proponents as marginals. Moreover, in the latter case, they are often perceived as traitors. There is a subjectivization of the concept of marginality: processes and phenomena recognized as marginal by some individuals are not considered as such by others, and those who are marginalized may not feel or experience the typical problems associated with this psychological state.

There is a strong and persistent tendency in defining and describing the process and phenomenon of marginality to practically completely avoid or ignore the personal dimension, particularly the personal determinants of marginality as a psychological state. The main focus is on socio-economic, political, cultural, and other factors that determine the presence of an individual or group in a marginal situation. Increasingly, marginality is conceptualized as exclusion, incapacity, and is defined by the vulnerability of certain individuals or groups compared to others. Thus, ignoring the personal dimension, i.e., the psychological state and experiences of individuals, often leads to the acceptance, description, and analysis of discrimination as marginalization or categorizing those who are discriminated against as automatically marginal groups.

Marginality is most often defined and described within the framework of social and spatial approaches. The latter allows constructing a typology of marginality based on the analysis of how individuals or groups are perceived in relation to various cultural spaces: planetary, the space of a state or political nation, ethnic or religious/confessional community, subcultural, professional, and other communities, groups, the space of a family or family clan. The proposed typology can be complemented in the future with an original diagnostic toolkit that will help identify similarities and differences in experiencing the state of marginality by individuals within different socio-cultural spaces.

Key words: marginality, cultural marginality, globalization, glocalization, subjectivization, social space, cultural space.