

Territorial marginality: causes, methods and policies. Introduction to the Special Issue

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Abstract. What are the different factors that make a territory marginal? Are contextual features related to spatial, socio-economic, institutional, or cultural elements differently influencing marginality in different countries? These are the questions at the origin of this Special Issue. To explore the complexity of territorial marginality and the several dimensions that contribute to defining it, this Special Issue collects seven works that explore conceptual issues, possible conflicts, and challenges for developing marginal territories. We explore the conditions that cause or define marginality, the dimensions that should structure a definition, suitable quantitative and qualitative indicators to classify marginal territories, and the features of territorial policies and strategies to address them. The papers explore different meanings of marginality using diverse research methods: quantitative approaches address the use of cultural heritage, population ageing, the lack of infrastructures and the limitations of existing policy approaches; mixed-method approaches combine statistical indicators with qualitative methods to explore landscape features and workspaces in marginal areas; finally, qualitative approaches analyse causes and impact of marginality in everyday life.

1 Background

What are the different factors that make a territory marginal? Are contextual features related to spatial, socio-economic, institutional, or cultural elements differently influencing marginality in different countries? These are the questions at the origin of this Special Issue.

Marginal areas are traditionally defined as those far from the main urban centres, based on a core-periphery model (Cullen, Pretes 2000, Gatzweiler, Baumüller 2014, Herrschel 2012, Ferrau, Lopes 2004, Bock 2016). From this perspective, marginality is an intrinsic spatial condition rather than a transient feature. However, the geographic distance from the poles is only one among the many conditions that can help to define marginality, which could be better defined as a process deeply influenced by socio-economic changes (Máliková et al. 2016). Marginal regions can be peripheral in geographical location but advanced regarding their socio-economic situation. On the other hand, not every marginal region is necessarily peripheral: on the contrary, several studies suggest an interpretation of marginality as a lack of socio-economic and political connection (Leimgruber 2004, Pelc 2006, Bock 2016).

Moreover, in European countries such as Germany, France and Italy, the concept of marginality has often been associated with rural or mountainous areas. Still, different

contributions to this Special Issue show that marginal territories may have very diverse geographical and orographic conditions. In addition, the scale at which a region can be defined as marginal and the administrative borders may also significantly influence the definition of marginality itself.

The lack of a broad, shared definition of marginality affects the identification of marginal territories and the possibility of developing adequate territorial policies to rebalance their marginal condition. Europe shows different attempts at defining marginal territories before proposing devoted policies. For example, Italy refers to the concept of “inner areas” (Materiali Uval 2014), while the Espon (2017) project PROFECY refers to “inner peripheries”. The different names given to marginal territories and the different definitions of marginality require exploring the meaning of considering the other features that may make a territory marginal. As a result, marginality should move from the core-periphery model that considers accessibility to services and goods and distance from central places, considering how a combination of physical, social, economic, institutional and cultural aspects defines marginal territories.

2 The Special Issue

To explore the complexity of territorial marginality and the several dimensions that contribute to defining it, this Special Issue collects seven works that explore conceptual issues, possible conflicts, and challenges for developing marginal territories. We explore the conditions that cause or define marginality, the dimensions that should structure a definition, suitable quantitative and qualitative indicators to classify marginal territories, and the features of territorial policies and strategies to address them. The papers explore different meanings of marginality using diverse research methods: quantitative approaches address the use of cultural heritage, population ageing, the lack of infrastructures and the limitations of existing policy approaches (Rossitti, Torrieri 2022, Vecchio 2022, Orellana Ossandón et al. 2023, Kercuku et al. 2023); mixed-method approaches combine statistical indicators with qualitative methods to explore landscape features and workspaces in marginal areas (Flipo et al. 2022, Porreca et al. 2023); finally, qualitative approaches analyse causes and impact of marginality in everyday life (Vendemmia, Lanza 2022).

The works analyse geographical and territorial contexts, including European and South-American countries. Rossitti, Torrieri (2022) and Vendemmia, Lanza (2022) investigate marginality in Italian inner areas, looking at two different Apennine contexts: Campania region in the South and Emilia Romagna in the North of the country; instead, Kercuku et al. (2023) focus on in-between territories, that is, those areas that are not considered either traditionally marginal or central. Flipo et al. (2022) provide an analysis of marginal territories in France. As for South America, Orellana Ossandón et al. (2023) and Vecchio (2022) analyse different dimensions of marginality in Chile, while Porreca et al. (2023) explore the suburban areas of Quito, Ecuador.

Some contributions focus on the definition of marginality. Vendemmia, Lanza (2022) reflect on the redefinition of essential services, using qualitative research methods to examine the effects of individual behaviours on the perception of marginality. Thanks to in-depth interviews and direct observation of a marginal area in the Emilia-Romagna region, the authors reveal that despite a statistical, demographic homogeneity, the population of rural areas is pretty heterogeneous (Moseley 1979), also in terms of available resources and motility. Moreover, an administrative mismatch (Herrfahrdt-Pähle 2014) has been detected in measuring accessibility and, consequently, designing policies to deal with marginality: transport and welfare services are planned according to municipality borders, while people move across borders to accomplish their everyday duties.

Rossitti, Torrieri (2022) developed a decision support tool named THEMA to help decision-makers in the SNAI context. The tool aids in defining local development strategies for Italian inner areas based on cultural heritage. The work departs from the observation that, despite the relevance of cultural heritage for inner areas, the subject is mainly considered a tourist opportunity. All information about heritage included in the definition of inner areas consider tourist flows but not the built heritage conditions.

Including this dimension in the analysis shows that intermediate municipalities, in accessibility terms, are affected by more severe marginality phenomena in economic, social, and heritage terms.

The idea that the territories in-between inner and metropolitan areas are becoming progressively marginal is at the base of the work of [Kercuku et al. \(2023\)](#) that sheds light on the importance of “intermediate territories”. In Italy, such territories, named *Italia di mezzo*, embody extremely articulated geographies, including portions of twentieth-century urbanisation, medium-sized cities with different administrative and functional centrality levels, metropolitan belts, and a substantial share of rural areas in plains and hills.

[Orellana Ossandón et al. \(2023\)](#) and [Vecchio \(2022\)](#) present two different ways to analyse lagging areas in Chile. [Vecchio \(2022\)](#) explores the presence of older people, examining census data to define areas experiencing a demographic decline and observe if these correspond to the areas that national policies define as marginal. Moreover, he examines official documents to consider to what extent national policies and local development plans define ageing as an element of marginality. Population decline in Chile defines a geography of marginality that complements and expands the one defined in policy strategies, including a wider perimeter. In contrast, institutions at different levels are only partially prepared to deal with the socio-spatial implications of an increasingly older population.

[Orellana Ossandón et al. \(2023\)](#) developed an index called “Territorial Infrastructure Support Index” (ISIT), which considers six different infrastructure components: Water, Energy, Roads, Telecommunications, Logistics and Resilience, working on “material foundational economy” ([Froud et al. 2018](#), p. 20). The index reveals that in Chile, infrastructures are relevant regarding accessibility to public and private goods and services for many urban and rural localities scattered throughout the national territory. Therefore, their development may help to deal with socio-territorial inequalities.

[Porreca et al. \(2023\)](#) overturn the idea of marginality, hypothesising that marginality might have a positive meaning and be beneficial for enhancing landscape values. This approach emphasises that there is no absolute and global exclusion or social marginality but rather a tension between rejection and integration. In the same direction and looking at a possible strategy to deal with marginality, [Flipo et al. \(2022\)](#) analyse the impacts of co-working spaces (CSs) on marginal territories, discovering that, despite a mainstream interpretation that supports the implementation of co-working spaces in rural areas to increase social diversity by promoting new inhabitants and new lifestyle, CSs strengthens the networks of like-minded individuals, bearing the risk of estranging themselves from the rest of the population and making them marginal concerning local communities. On the contrary, a wide range of inhabitants has appropriated “multifunctional third-places” that expand the idea of CSs, providing many services (such as printing, photocopy, and distribution of local newspapers). These spaces are thus an effective tool to attract new inhabitants while integrating them into the local community.

3 Avenues for future research

The seven papers in this Special Issue provide an overview of the multiple established and emerging research topics related to territorial marginality. While the contributions do not intend to provide an exhaustive discussion of marginality, some research issues appear transversally in the papers. These point to some possible avenues for future research and hopes to inspire further research on the topic referring to at least three dimensions:

- The *definitions of marginality*. The traditional core-periphery dichotomy has a different meaning depending on the setting and the territorial scale. It goes beyond a simple spatial definition based on the distance from main centres. More and more, social, economic and cultural specificities define marginal territories, leading to different approaches by scholars and policymakers. In this sense, it becomes crucial to explore such conceptual multiplicity further and stress it to question the traditionally negative implications of marginality.

- The *settings of marginality*. The issues of marginality have been at the centre of scholarly and policy debate in several European Union countries. However, other settings have also used similar concepts to identify areas with territorial specificities requiring devoted policy measures. As a result, it is essential to expand the territorial focus of the research on marginality (the papers of the Special Issue devoted to Chile and Ecuador are the first example in this sense). Moreover, it is relevant to provide comparative studies across different settings and dimensions that may shed new light on marginality.
- The *dimensions of marginality*. Quantitative approaches from disciplines such as geography and economy have often dominated the research on territorial marginality, privileging aggregate analyses that define marginal areas and their economic performances or demographic trends. As shown in the Special Issue, qualitative and mixed-method approaches can be relevant to grasp several other dimensions of the phenomenon and what it means for the everyday life of those who inhabit marginal territories. Moreover, by combining different methods, it is possible to gain deeper insights into marginal areas that can inform more robust policy proposals for these settings.

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