

## THEORETICAL AND METHODOLOGICAL QUESTIONS OF SOCIAL GEOGRAPHY

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### Abstract

The article discusses and examines the main aspects and relations of Social Geography in light of a humanist approach. Social Geography is genetically traced from its origins, and then defined and analyzed. Its relations with Public Geography are outlined and the multiplying effect of this process is revealed. The origin of social communities, the approaches used in their study, their taxonomy, the relation between the communities and the organization of the social process are also the focus of this paper. Furthermore, the social relation between Geography and Sociology is analyzed, and common goals and priorities on the basis of the application of a humanist approach are identified. The correlation between Social Geography and the Social Policy is traced and characterized. The social approach to studying territorial communities is justified and the stages of social reproduction are differentiated. The regional expression of social reproduction is synthesized through two main components – necessity and socialization.

**Key words:** Social Geography; Humanitarian Approach; Sociology; Social Policy; Territorial Communities.

### Resumo

O artigo discute e problematiza os principais aspectos e relações da Geografia Social à luz de uma abordagem humanista. A Geografia Social é apresentada desde a sua origem, tentando defini-la e analisa-la. As suas relações com a Geografia Política são também descritas e o efeito multiplicador deste processo também é revelado. A origem das comunidades sociais, as abordagens utilizadas no seu estudo, a sua taxonomia, a relação entre as comunidades e a organização do processo social são também focados no presente capítulo. A relação social entre a Geografia e a Sociologia é também analisada, e as metas e prioridades comuns com base na aplicação da análise humanista. É ainda realizada uma correlação entre a Geografia Social e a Política Social. A expressão regional da reprodução social é sintetizada através de duas componentes principais - necessidade e socialização.

**Palavras-chave:** Geografia Social; Abordagem Humanista; Sociologia; Política Social; Comunidades Territoriais.

## 1. Introduction

Geography focuses on the natural environment, hinting at a wide range of problems – cultural, behavioral and others. We seek their core causes in the social sphere. If we turn to practice, we should trace not only the process of recognition, but also the appropriate means of confirmation. This leads to the following definition expressed in Figs. 1, 2 and 3.

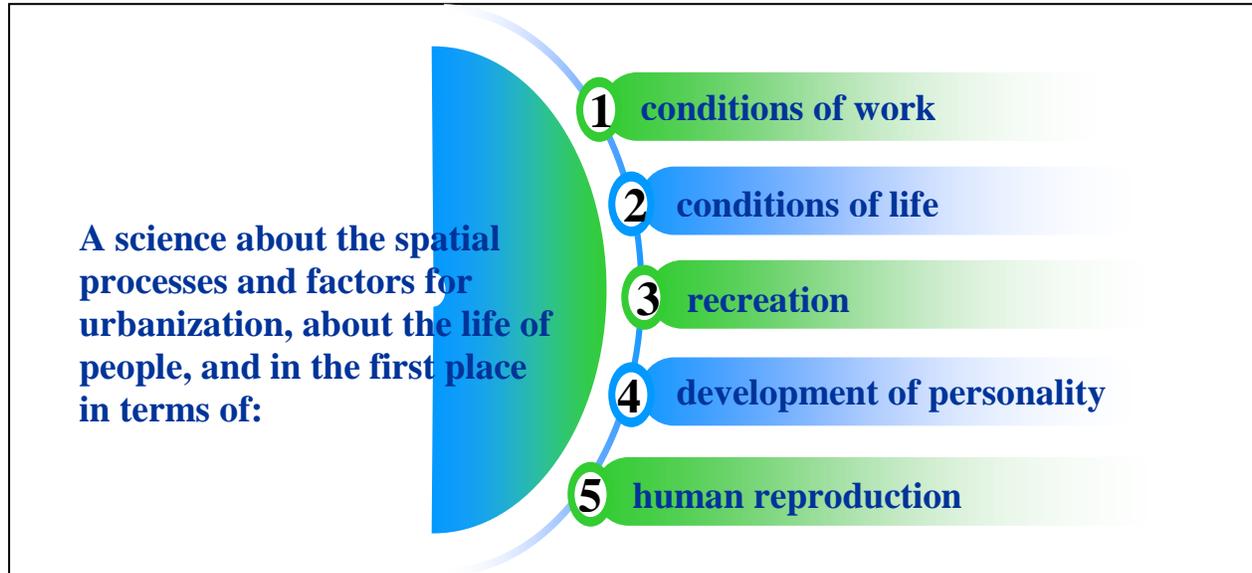


Fig. 1 – Nature of Social Geography

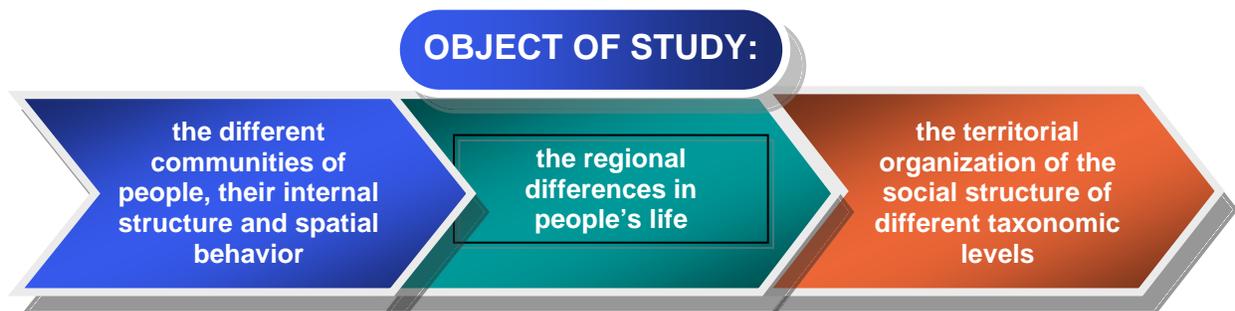


Fig. 2 – Object of Study



Fig. 3 – Fields of research

In the social sphere the progress is... encouraging, so far.

1. If the initial period, dating back to the first decades of the last century, is connected with a “peak” in identifying the (geo)demographic peculiarities of the people, and with creating instruments to analyze the “expected” on the basis of the “right” scientific conceptions – methodological and theoretical –, then this is a “success” of Social Geography.
2. In the mid-20<sup>th</sup>-century, researchers were induced to delve into the ocean of Sociology. There, Social Geography has a role as a modest recorder of events. But for the sake of modesty we are not going to list its other “roles”.
3. The sinusoidal character of social processes gave us the results of the “happenings” during the 1980s. Objectively treated by all the social sciences, this led to the acknowledgement that Social Geography was one of them. It was “recognized” in the specialized scientific research and adequately certified.

## 2. Social Geography: some aspects of its evolution

The first attempts to define Social Geography were made by Elisée Reclus (1875) and Albert Demangeon (1922). So as to trace the scientific evolution of Social Geography we outline the following main characteristics.

The first one is connected with the etymological clarification of the term Social Geography. The numerous publications on this problem cannot be treated synonymously. Here we can mention some of

the Western authors with more unconventional ideas: Jones and Eyles (1977), Ratzel (2008), Mazurkiewicz (1992), Harvey (1990), Benko and Strohmayer (2004), Gould and Strohmayer (2004), Claval and Entrikin (2004), Benko and Scott (2004), Bassin and Berdoulay (2004), Taylor and Van der Wusten (2004), Philo and Soderstrom (2004), Ley and Samuels (1978), Samuels (1978), Buttimer (1978), Wallace (1978), Harris (1978), Tuan (1978), Fernandes (2000) and Pina (2009).

The studies of Jones and Eyles (1977) are directed at the determination of the nature of Social Geography, the conceptions, models and approaches in its development, the specification of the group framework and the decoding of the space-model-process interrelation. They comment on Social Geography as follows: "The obvious academic relation is between Geography and Sociology, and we are going to develop the discourse, that a great part of the socio-geographic theory can be sociological by origin, but there are also other important relations as to planning, History, Geography, Economics for instance. An eclectic like this, means that there is no topic that all of the socio-geographers would accept. Some would say that Social Geography is what the social geographers are dealing with" (1977, pg. 5).

Ratzel (2008) discusses questions related to the interaction between social basis and culture, and Mazurkiewicz (1992) speaks about the factors that led to the accelerated development of Social Geography, and especially about its introduction to Eastern European science. He connects this "boom" with the process of economization and regionalization. Buttimer (1978), Harris (1978), Ley and Samuels (1978), Tuan (1978), and Wallace (1978), among others, stress the epistemological orientations and the methodological implications.

The research of Harvey (1990) is very extensive and spectral. In the context of the development of Social Geography, he examines and analyzes the correlation between time and space, the cultural-political answers of their inconstant dimension, the factors and dynamics for development of Social Geography, ultimately, the geographical imagination.

The second characteristic rejects the existence of Social Geography as an independent science. The studies in this sphere are accepted as fragmental displays of the socio-geographical expression.

If we consider Russian Geography, which is the most sensitive to the problem (probably subconsciously compensatory), we note a different approach to the recognition of the "formal" geographical sciences, influencing the view of Social Geography. Alaev and Gohman (1983), the theoretical coryphaeuses of Russian Geography, look at it as a part of the triune methodological approach, studying the Economics, the *Socium* and the Ecology. V. Gohman (1984) determines the third "pillar" as a cultural-geographical one, and thus draws respect for his work. In times when the production sector was "everything" to the "Great East", as was culture – an unreliable theme.

Also indicative is the statement of Y. G. Saushkin (1973): "Social Geography" is not a new "branch" of science of a type of Geography of Industry, Geography of Population, Geography of Services, but

simply the socio-geographical aspects should be present in all the fields and branches of our science!" In the last explanations Social Geography is examined as an independent science, but it has a different role in the hierarchy of socio-geographical directions. Probably because of this many authors mention its close relation to Geography of Population and to the interdisciplinary character of socio-geographical studies. Some authors even examine Social Geography as a part of Geography of Population, studying the social development of territorial social communities (Dolinin, 1984).

Others classify it as equal to Economic Geography, giving it the status of a leading geographical branch (Ratviyr, 1984; Alekseev, Kovalev and Tkachenko, 1983; Mironenko, 1990, among others). Social Geography is often referred to as a branch of Socio-economic Geography, studying the regularities and factors of development of traditional social cultures, the rates of their activity and the objective social proportions of "coexistence" (Mironenko, 1990)

Indeed, the object of this science is society, while the subject refers to the territorial organization of the social sphere. According to some definitions, the place of Social Geography in the system of geographical social sciences is within the range of the social sphere, including economics, as well as social, spiritual and cultural activity. Each of them has responsible functions. So, for instance, the economic sphere aims to ensure the necessary conditions for its realization, through production and providing resources for living,.

The social sphere is directed at the qualitative demographic elements of society, the spiritual one – to the formation of moral values, which are revealed in the taking of geographical decisions, defending the personal, as well as the "regional" collective priority, the political one – to the creation, cultivation and reproductive realization of political ideas.

The many attempts to separate Social Geography from Geography of Population and Social Culture have always led to the initial question concerning its objective scientific content. In 1984, T. Ratviyr suggested an approach, consisting in the examination of the question of how we can achieve a real collaboration between Geography and Sociology through the prism of the "synthesis-integration" relation. He claims that "in Social Geography, the already confirmed socio-geographical scientific directions are not included, but only the socio-geographical segments of Geography of Population, Cultural Geography, Geography of Education, as well as the socio-geographical body of Economic Geography".

In this sense, the variety of opinions on the content and the place of Social Geography reflects the different approaches to the sociologization of Public Geography. And determines **two levels** of this process.

- The first one is connected with the range of the object of formal socio-geographical subjects (sciences) and determination of a group of methods to examine the sphere of their competence.

- The second one assumes a transition from the quantitative (empirical data, publications, results) to the qualitative physiognomy of the socio-geographical direction.

That is to say the sociologization of Geography is a multispectral process, corresponding to global trends in social development and to the dialectical logic of the development of the science, on the basis of the differentiation and integration of the spheres of human knowledge.

“The inspirer” of Social Geography in Russia, V. P. Maksakovskiy, even today argues that such a science would be directed at man, at goodwill in his attitude to the environment, and at his social comfort. If you read the inaugural speech of V. Maksakovsky (2007) delivered to students of the Moscow State Pedagogical Institute, when he gives thanks for the Moscow student days he had, you will be convinced of his objective humanist orientation, his worldly honesty and his good academic reflections.

The natural “infusion” (actually it has never been outside) of Social Geography in the Public one is expected and admired. The opposite would be quite illogical.

### **3. Social Geography, territory and community**

The question about the situation of persons in the sphere of socio-economic relations presumes their social adaptation, which inevitably makes man part of the territorial community. The latter represents a special object of socio-geographical research.

The term “social community” is convertible in sociological, as well as in geographical environment. It has been well documented in academia mostly by the representatives of eastern geography from Polish (Schtepansky, 1969) and Bulgarian Sociology (Yahiel, 1982; Oshakov, 1983).

The objective spiritualization of the individual, provoked by the environment of his habitat, takes on an adequate attitude to the outside world. Referred to the past it calls to light German Sociology, represented by its scientific forerunner, F. Tönnies (1887), and by the robust (pre-revolutionary) Russian Sociology, whose identity was established in the scientific world through the works of A. I. Stronin (1869), studying the socio-economic structure of society.

In socio-geographical works territorial communities have a specific social character. They are resource groups of Social Geography and Geography of Population, provoking studies in reference to inequality of settlements, of social arrangement, of the way of perception of social processes, etc.. The community itself provokes discussions and, in terms of its scholarly determination, the structural-contextual character of its social dimension. The English equivalent of the term (“community”) includes more than a hundred definitions (Hillery, 1955).

We can certify three main approaches to “community”:

1. The first one is connected with revealing the specific relations that stimulate and accumulate a spirit of social appropriation.
2. The second one studies the network of interrelations, in which intentions do not refer to an adequate partner, but lead to tension in relationships.
3. The third one has geographical "filling". It perceives the concept of "community" in the sense of a combination of social relations, which are displayed within particular state or administrative borders.

The territorial community is usually accepted as one of the social groups, designated on the basis of territorial indication, having the freedom of social communication. The manifestation of territorial communities is a socio-geographical task. In establishing its domain, the contribution of Alexeev and others (1983), Mironenko (1990), Trofimov, among others (Trofimoy, 1993a) is, in our opinion, undisputable. At the same time, it proves to be an independent socio-territorial system or a nucleus of the functioning territorial systems (Trofimoy, 1993b; Tkachenko, 2001).

In terms of scholarly veracity, in the sense of the "territorial community" concept, there are no differences of the principle in socio-geographic literature. The fixation of the object of study provokes the consolidation of joint methods and approaches of research. Even research-workers, expressing their doubt about the "scientific empathy" in the usage of sociological and geographical approaches (Tkachenko, 2001; 2002a; 2002b) register the need to adopt a complex attitude to the divided areas of the social environment, recognizing the different methods applied in research works.

Territorial community is one that can be spatially acknowledged. Its immobility or mobility has geographical and social arguments. Its pictorial and realized characterization includes three basic components:

1. Geographical territory (the territorial aspect);
2. Social interaction (the sociological aspect);
3. Common interrelation (the psycho-cultural aspect).

Referring to the first one, we would note its bilateralism. It can be seen in the perimeter of the surrounding environment, forming respective living conditions for the individual, as well as in the necessity for protection of this life, substantiated by the corresponding social activity of the same individual. The sociological aspect of existence of any of the territorial communities includes the realization of its social components as a whole, the adaptation of the territorial-social system in the conditions of the taxonomy scheme, focusing on the direct social needs of society.

The psychological aspect is charged with doses of subjectivism. It focuses on the self-identification of the social element, on finding those common goals, values and standards of communication, which could lead to the desired and adequate territorialization of intentions.

The territorial community is a basic benchmark of Social Geography. Its diversity, framed and exposed, is a peculiar heliographic projection of what happens... somewhere.

In historical terms, the manifestation of territorial communities is encoded in the human notion of evolution, in the forms of the social division of labor, and in the way social life is organized. At the end of the 19<sup>th</sup> century, the historian-ethnographer Morgan suggested a summarized scheme fixing the process of social evolution through the separation of its stages, distinguished by the manner of interrelations between man and the natural environment and the consumption of the main forms of usage of nature. He does not really focus on the character of evolution of social systems, built on the "supremacy" (?) of man over the surrounding environment, but rather on the adaptive change of the social structure of society.

In the mid-20<sup>th</sup> century, the American sociologist R. Park "fixed" four stages of human society as a social organism (ecological, economic, political and cultural). His studies, materialized in the conclusions, assume there is a close relationship between the "socium" and the necessities of the cultural spectrum of social activities. (Banykovskaya, 1994).

Without addressing some historical-psychological details concerning the evolution of nature and the manifestation of territorial communities, we have to mention the significant influence of the transition from industrial to post-industrial society. Its character and depth of display have been discussed in many works. Summarizing, we could mention the publications of Baranov (2000) and Yanitsky (1998), establishing the interrelations and the objective geographical condition of large urban territorial communities.

The essence of the multidirectional works related to this question formalizes several stages of scholarly evolution.

1. The development of local (as a rule town) territorial communities in the conditions of the "inspired" industrial stage, when they were created because of production reasons, based on the loyal relations between man and "the formalizer" (the employer, from the present point of view) of his activity. Here we should mention the fact that these communities do not have political influence. They are typical for spiritual-production individuals working in the Russian "Kamaz", as well as for the leaning of the employees of the French "Michelin" from Clermont-Ferrand or "Rhone Poulenc" in the 1970s. The 37 thousand employees working for "Reno" in Sochaux-Montbeliard certainly will confirm our thesis. Because politics is the social "lustre" under which the leanings of people take place.

Unfortunately the attempt to “introduce” foreign innovations in Bulgaria failed. The homes of workers in Radomir remained uninhabited and isolated. Those of Kraymorie and Debelts were not finished. Those built in Madan, Rudozem, Kardzhaly, and Dimitrovgrad were abandoned.

Paradoxical (probably only for those who are not familiar with the socio-economic relations in Western Europe) is the emergence of housing complexes of the Socialist type. Filled with different contents, of course. This can be confirmed by how people from Lancashire lived “this” way and in “these” conditions, as well as the shipbuilders from Dunkerque, Havar, Fosch and Setubal, working in the “flagrant Bulgarian areal complexes” of Madrid and Barcelona.

2. The second stage of development of territorial communities assumes activities have taken place directed at their psychological objectivization. In searching for legitimacy, necessary for every subject of the social object, at the necessity to look for support there. This presumes the presence of great independence and of social quest, of the acquisition of regionally-responsible freedom, which the members of the community can recognize as one that they need in such moments.

3. The third stage, following the logic of descending taxonomy, presumes an adequate relation of the community structures when local activities are “realized”. It is maybe the most unattractive, but also the most effective in national terms, as well as in applied practical terms.

Another approach to territorial communities, based on the regularities in the spatial organization of society, is suggested by Tkachenko (1995), where the stages of development are related to the way of organization of space, including mainly “taking care” of the sphere of services, the way of settling down and working.

In 1993, a group directed by Trofimov (1993) developed methods to differentiate spatial communities based on the territory. Within the framework of the post-Soviet space, communities were differentiated as:

1. Population of national-state and administrative units, that displayed their “will” for settling and determining the demographic format;
2. “Other” population, inhabiting the peripheral geographic “localities”, following “concrete” ways of life according to geographical conditions.

From the position of the “alleged” Western point of view, a classification like this provokes discussion. From the position of the “right” Russian view, it has a dissident character, only because of the element of evaluation. In Social Geography the taxonomy of territorial communities is analyzed in the light

and within the framework of social areas, which (no matter how many contradictions there are in their organization) have the following levels:

1. Territorial communities at national level. We accept them as the largest, historically developed territorial communities, which were preserved due to social interrelation as well as to the nostalgic feeling for keeping what is national.
2. Territorial communities in large socio-economic areas. Their heterogeneous origin “boldly” contrasts with their homogenous social behavior. It is dictated by the sense of political, cultural and... own survival and self-preservation.
3. The territorial communities at district, municipal (and why not at prefectural) or at whatever other level. Their differentiation is the most objective picture of the ethno-demographic diversity. But also the most inconstant and unstable. Because of the social psycho-geographical process, this means documenting the almost invisible social interrelations.
4. The community, encoded in the consciousness of each one of us, looking at the social processes with some hope. It is the one that we consider as primary, initial, irreplaceable. This is the family, the lineal community. From which everyone starts their travel along the path of their ambitions. But to which everyone goes back in deeply hidden moments of their individual spiritual peace.

This community determines the psycho-geographical nucleus of conscious and behavior, which a normal person cannot avoid. It has a secondary root – either the memory of its creation and localization, or the romantic taste of what have been shared by the predecessors concerning the possibility of recollections to be “present” at their sharing.

The interaction between Geography and Sociology leads to the appearance of the territory of T. Parsons (1996), who distinguished five structural categories – value, norm, community organization, manifestation (social role, physiognomizing the territorial communities). The studying of their psychology and the territorial aspects of Geography lead not only to the territory's sociologization, necessary for every “open” society, but also to fully shaping of its multilateral scientific spectrum.

#### **4. The society and the importance of individual**

At the beginning of the 20<sup>th</sup> century, P. Sorokin (1920) discussed society as a collective unity, as a combination of mental interactions, not taking into account the “spiritual” entity. Thus he hints at the slight difference between individual and person, suggesting that the second one could be a factor in the social

process. This is confirmed by the consequent “happenings” in society, “legitimized” scientifically in the publications of Waters, assuming people as elements of the social system. (Sivov, v. (2003).

Seven types of systems are adopted in sociology: individual, family, group, organization (firm, enterprise and others), social institute (law, education, religion and others), territorial community (village, town, district, country), and world community (world system) (Plotinskiy, 1998; 2001). Of greatest interest for Social Geography are the last two types, having territorial indication and an active relationship with the social systems and the other taxonomy levels, with the forms of spatial organization, behavior and influence on territorial communities.

The main difference of social systems compared to others, is in the genesis of their basic functions, leading not only to their existence, but also to their self-reproduction. The term autopoiesis (self-reproduction), later recognized by Biology during the 1970s, was scientifically used by Maturana and Varela (1980), Luhman (1995) and others. Autopoietic processes describe the reproduction components of living systems, through which they preserve their vitality, organization and integrity. The main peculiarity of the operating social systems and their cognitive qualities, modification and regulative organization could be revealed through the self-reproduction processes.

We have to note some of the characteristics of social systems:

1. The probable character of behavior and interrelation between the system elements.
2. The “openness” of social systems to the aggressiveness of the “outer” information environment.
3. The “diluted” borders – conventional, declarative, functioning.

The characteristics of geographical systems which are formed and function on a particular territory, as a result of the interaction between nature, population and economy (Smirnov, 1971; Saushkin, 1976), are analyzed by Huzeev (1997). He claims that they are such territorial formations, in which not only borders are indistinct, but also the basic types of interrelations, as well as the motives for behavior and their compound elements.

The significance of social systems provoked the emergence of a new type of “works” – of “relative” systems. From the geographical point of view, these are the works of Cherchman (1979) and Checland (1990) during the 1990s, making reprehensive, but not destructive comments upon the systems. The methods and algorithms suggested and tested by Checland, attacking the problematic character of social systems, in which the main role is played by participants (both individually and in a group), confirm the hypothesis about the social adaptiveness of the group subject and about the necessity of collective social behavior.

The territorially settled way of life of the population is a process, provoked by the existence of the individual, as well as by the direction of his thinking. He is a participant in this kind of activity, in which his

geographical being is a part of the social process. Under the influence of the socio-reproduction approach, in line with the understanding of Kabo (1947), geographical science has the task of “studying the social man and his image (and behavior), his multidirectional characteristics and activities”. With the works of Kabo and the consequent publications of Pokishevsky (1978), Kovalevsky (1979) and Baransky (1980a; 1980b; 2001), the conditions for “the birth” of Socio-economic Geography were created, for its curious gazing at the problems of the “nonproduction” sphere.

The first scientific meeting discussing these questions in Russia (1962) raised the official scholarly “directive” – the study of the “territorial aspect of the population and the productive forces as producer of material and spiritual values, as well as reproducer of them.” (Trofimov, 1993)

The late 1960s and the early 1970s marked the rise of geographical branches such as Socio-economic Geography, Geography of Services, Recreational Geography, Cultural Geography, Geography of Religions and others. Subsequently these aspects found their place in regional studies, aimed at forming the socio-economic image of particular territories (Agafonov, 1984; Anohin, 1984; Lavrov, 1984).

## 5. Conclusion

Social Geography pays great attention to the contextual and territorial expression of the result of applying innovation technologies. Its interest in the government-production-result-information relation is especially strong. A greater part of the social sector of regional interrelations ignores the last component of the “equation”. In our opinion, wrongfully.

The social basis is not constant. It is inherited especially in social relations. As such, it maintains interactions between environment, society, production and way of life, which correspond to its level of realization. A factor for its optimization is the achievement of social consensus, which balances the interests of the various social layers and social groups. This is a purpose of social policy, as well as of Social Geography, whose first concern is the territorialization of the process and the filling of the territory with the adequate social content.

From this point of view we consider social policy as a “helper” of Social Geography, and the latter, as a recorder of the materialized social successes. In the conditions of predetermined globalization connected with the global mobility and the common world market, may be this question is not of primary importance. A deep delusion!

We refer to it as a basic one, because the perception of man as a social individual, his identification with particular social and ethnic group, influences not only his socio-psychological behavior. It unlocks this recess of his spirituality, which makes him significant in his own circle. In this way he recognizes it, gets to

love it, defends it more and more, and stands up for its right of social and territorial community. And such an act of self-expression and defense is a significant factor for change of Geography.

New socio-economic conditions give innovation economy a key role – to preserve and stimulate the demographic (and in a broader sense human) capital as a basic resource for achieving prosperity. Here, at first sight, Social Geography enters a scientific conflict with social policy. However, this is the apparent part of the question. There is no way a conflict between form and content could exist. And more important – there is no being without these two indications, which gives Geography an everlasting presence in social processes.

The other question has to do with the desire of social communities to become integrated, to form unified (?) social space. It presumes that the natural social instinct of the content would put on “new robes”, that is to say to change its form. And the process of “happening” is within the competence and the leading role of Social Geography. In this respect, there are already such attempts in Europe. We should not forget that, according to the numerous normative documents, the social policy of the European Union includes removal of linguistic barriers, organization of a system for social security, introduction of new technologies in education and management of knowledge (virtual, technologically-informational and others).

We understand that the unity of the social aspect of the European continent is a hope. Maybe a goal, and maybe a chimera? However, what is most important is the way in which it is achieved.

As the great Chinese wise man Confucius says: “There is nothing sadder for a hope, than to be fulfilled”. We are clear that in this respect Europe would hardly ever sadden the hope. But, the way to that goal...

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