

**The Gordian Knots in the European Regional Scene  
The Experiences and Prospects of  
Southern Italy, Eastern Germany, and Eastern Poland**

**Introduction**

The present paper has been conceived as a part of the new trajectory of the Regio Futures Programme that has been outlined by Antoni Kukliński in his programmatic paper “Gordian Knots – A New Trajectory of the Regio Futures Programme” (cf. Kukliński, 2008a). The paper’s scope is delimited by focusing on the phenomenon of some of the most persistent “lagging behind” regions of Europe as an object of policy intervention and social science research. The cases featuring in the paper include Southern Italy, Eastern Germany and Eastern Poland – jointly labeled by Antoni Kukliński as the “Triple European Mezzogiorno”, whereby the southern Italian region of Mezzogiorno is taken to constitute an emblematic example of failed regional development policy and the continued failures by policy experts and social scientists to tackle this problem.

**The Triple European Mezzogiorno –  
a challenge to social scientists, policy experts and decision-makers**

The so called non-development of Mezzogiorno has for long puzzled social scientists, policy analysts and decision-makers in Europe and the United States.<sup>1</sup> The region has been

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<sup>1</sup> The literature on Mezzogiorno is too extensive to be exhaustively cited in the paper. References to selected publications will appear further in the paper. At this point I would only like to draw attention to three authors whose contributions might be seen as breakthroughs in social science interpretations of the socio-economic, cultural and political profile of Southern Italy. These are Edward Banfield (1958), who articulated the problem of collective action in a backward region governed by the logic of zero-sum social games developed in the context of historically reproduced deficit of economic and social resources framed by traditionalist hierarchies; Diego Gambetta (1988, 1993), who revealed structural mechanisms leading in backward regions, ill-equipped in weak and untrustworthy public institutions to the emergence of informal, substitute institutions, out of which in the Italian South the key role is played by the Mafia as an alternative (in relation to the state and territorial self-government) guardian of trust and norms of reciprocity and as a source of public and private security; and Robert Putnam (1993), who emphasized the significance of deep historical roots and social embeddedness of regional

frequently presented in the relevant literature and the policy papers as a nexus of historically (re)produced economic, social, cultural, and political problems that require an external, large-scale intervention by supra-regional authorities. Until the 1980s such an intervention was authored by the Italian state. Subsequently, following the invention of the Common Regional Policy by the European Communities, the objectives, procedures and measures of the public intervention to trigger development in Mezzogiorno have combined traditions and resources stemming from the two sources.

Despite the decades' long massive intervention, accompanied by an exponentially growing body of ex-ante and ex-post policy evaluation and the related social science analyses, at the beginning of the XXI century Mezzogiorno has not managed to cease to be the emblem of regional backwardness, economic inefficiency, and political ineffectiveness. Only relatively recently there has started to appear a stream of studies, analyses and manifestos that have attempted to depart from this firmly established discourse and deconstruct the image of Mezzogiorno as a uniform, permanent, and inexplicable regional problem-area (cf. Cassano, 2002; Meldolesi, 2004; Rossi, 2004; cf. also Gašior-Niemiec, 2008d). Their impact on the dominant views has, however, been quite modest so far. Nonetheless, in the future this impact may be reinforced by another, incipient stream of social science studies and interpretations which have explicitly called for making an analytical linkage between the *sustained backwardness* of Mezzogiorno and the *logic of the prolonged external policy intervention* in the region. The present study should be situated in this context.

The apparently intractable problem of non-development in the Italian Mezzogiorno, the related public policy failures, and the concurrent deficit of holistic, plausible and future-oriented (i.e. sensitive to potentially significant micro-processes and developmental weak signals) social science accounts of the problematic should necessarily command a heightened interest on part of decision-makers, policy analysts and social scientists in other countries where there occur cases of manifest regional imbalances. This necessity seems all the more pronounced in those European countries where the regional imbalances have already congealed into a dualistic developmental pattern whereby significant shares of their respective regional spaces are classified as “less favoured”, “underdeveloped”, “lagging behind”, and/or – straightforwardly – as “backward”. In some of those countries large-scale, massive external policy intervention programmes have also been designed and have, at least partially, been

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institutions as well as devising a thought-provoking – albeit in many respects controversial – conception of social capital and civic virtues as crucial factors of regional development.

already implemented. Post-unification Germany and post-accession Poland are most conspicuous examples of such European countries.

In the circumstances, the present appeal to reconsider the experiences of the Italian Mezzogiorno and to juxtapose them to the situation in eastern Germany and Poland seems urgent. Noteworthy, the appeal emphasizes the need to make use of research frameworks deviating from established socio-economic paradigms and mainstream methodologies as a necessary complement to the former (cf. Kukliński, 2008a, b). This emphasis is related *inter alia* to the current German evidence which shows that even seemingly perfectly designed and lavishly funded policy programmes such as the *Aufbau Ost* (Rebuilding the East) programme – which has been already running for ten years basing on top expert analyses and recommendations – have proved to be disappointing and are provoking intensifying criticism and frustration both on part of the policy-makers, analysts, and the regional populations involved (cf. Lentz, 2007; Assman, 2006; Röpke, 2006). In the meantime, in Poland another large scale operational programme, labelled *Polska Wschodnia* (Eastern Poland), has just been approved for implementation.

Doubtlessly, in both of the two countries top experts and specialists were commissioned to prepare analyses on which the planned policy intervention is based. The respective objectives, procedures and instruments included in the East development policies in Germany and Poland were thus designed basing on certainly valuable scientific reviews and recommendations. Moreover, the necessity to embark on those large scale public interventions in the eastern regions of the two countries has been recognized and approved by experts affiliated by the European Commission. However, the Italian (and so far German) case suggests that the design and implementation of such large scale pro-developmental programmes is an extremely difficult and risky enterprise which requires constant monitoring and flexible rules allowing for their on-going evaluation and re-adjustment.

This is evidenced by the fact that apparently, despite considerable financial and institutional means involved in such programmes, they do not succeed in reaching their major objectives. By contrast, they are liable to trigger and/or reinforce many (both undesirable and desirable) side-effects, which more often than not are not captured timely by mainstream analyses focusing on macro-level factors and utilizing aggregate, primarily quantitative data. It thus turns out that even highest quality mainstream analyses and recommendations underpinning scientific and political frameworks of such large scale public intervention programmes may not be sufficient to recognize and identify, take into account, explicate, and foresee all of the mechanisms and factors which could contribute to sustaining/breaking

patterns of regional (non-)development in the regions labeled as persistently backward. This partial analytical blindness should be openly discussed and progressively eliminated.

On the one hand, this partial analytical blindness is obviously related to the macro orientation of such analyses, which makes them operate at a level of abstract generalizations – the result being their concentration on mostly already shaped, mass trends and tendencies. On the other hand, it has to be attributed to the very nature of social science research, especially to features such as self-reflexivity and intentionality of social actors, which generally makes social science analyses vulnerable to unforeseen phenomena and processes triggered by (intentional and unintentional) changes in behaviour of social actors who have the capacity to react to (real and imagined) stimuli, discourses and practices appearing in their environment. These features certainly make the predictive power of social science analyses rather limited (cf. Mokrzycki, 1991).

On the other hand, however, this partial analytical blindness might be also related to what has elsewhere been labeled as a paradigm trap (cf. Kukliński, 2008b; Myrdal, 1967). Namely, too rigid and strict following of established scientific paradigms makes researchers and analysts stick to pre-defined and foreclosed sets of assumptions, concepts and hypotheses, which necessarily limits their cognitive horizon to only such processes, phenomena and objects that are perceivable, measurable and explainable by those conceptual paradigms and analytical toolkits. Research questions that exceed the limits of the given paradigms are simply not asked while phenomena and processes not fitting the given conceptual and operational grids are not recognized.<sup>2</sup> Thirdly, there is a problem of political correctness and/or lack of political courage affecting policy-related analyses, which again might make analysts not consider certain issues at all and not ask certain policy-related questions.

To exemplify, I will mention here three issues which – because of the aforementioned causes of partial analytical blindness – have hardly appeared in the Polish discourse of social sciences that describes the on-going transformation of the regions in Eastern Poland after the systemic breakthrough of 1989. These issues include: 1) the logic and effects of the policy of forceful, top-down “modernization” of those largely agrarian regions by means of structural mechanisms to lead to a rapid collapse of both large state farms and – in particular – small private farms which produced mainly for internal needs of countryside and small town families inhabiting the regions; 2) the lack of policy to support accumulation and conversion

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<sup>2</sup> A new methodology, developing on the basis of the concept of weak signals, could be pointed out as one of the potential ways to escape the trap of abstract generalizations, foreclosed paradigmatic reasoning, and concentration on already strongly established trends (cf. Gaşior-Niemiec, 2007b; Hiltunen, 2005).

of the capital gathered during mass labour migration of the inhabitants of those regions abroad – which, by the way, for years has proved to be the only viable strategy of survival and growth for the majority of the population in Eastern Poland, otherwise tellingly classified by social scientists as “losers” of the transformation; and 3) the logic and effects of the policy to “modernize” civil society in Poland after the collapse of the system of real socialism.

In the first example, it goes almost unnoticed that this “modernization” – implemented for about 20 years already – has led not so much to multi-functional restructuring of the Polish countryside, greater and improved professional involvement of its inhabitants in the regional labour markets or an increase in the quality of their lives. Rather, it has resulted in transforming considerable shares of the rural and small town populations – who earlier earned their living (and personal dignity) by working in the small family farms and/or shared the work on the farms with working in local factories – into permanently unemployed (“parasitic”) clients of local social assistance centers.

This transformation has, in turn, brought about negative consequences not only in the overall structure of income in the rural areas – which has been now dependent on unemployment, retirement and social benefits<sup>3</sup>, but also in the sphere of interpersonal relationships, collective and individual survival strategies prevailing now in the countryside and small town in Eastern Poland. Employment in the shadow economy, shuttle migration, involvement in illegal activities and organized crime has become “normal” strategies of survival and growth, while a dramatic surge in social pathologies, disrupting neighbourhood and family bonds and progressive devastation of public space and public goods have further reinforced the already strong trend towards stigmatization of those regions and people inhabiting them.

This policy of “modernization” has been also paralleled with intensifying drainage of economic and social resources of those poor and “backward” regions in eastern Poland. In the social dimension, the continuing mass scale emigration of the younger and better educated inhabitants (to big cities in Poland and mostly abroad) means continuing depreciation of the local and regional human resources. In the economic dimension, the scarce financial resources of the regional populations are drained because of the (intentionally accelerated by the state) collapse of the local production systems and the ensuing colonization of the sphere of local production, commerce and consumption by actors external to the region. These actors import to those depleted eastern regions goods and services produced outside of the regions selling

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<sup>3</sup> Apart from remittances sent by emigrants, that is.

them for *prices much higher* than those quoted in much richer metropolises (I do not enter here a discussion of the issue of usually much lower quality of the goods and services sold in those regions).<sup>4</sup>

In the second example, neither public authorities nor independent experts recognized a “developmental opportunity” into which the aforementioned mass labour migration abroad could be turned in those regions. In consequence, no mechanisms have been triggered and no measures implemented by public administration, banking system, business support institutions, educational system etc. to stimulate and facilitate systematic accumulation and strategic investment of considerable remittances flowing from the migrants to their families in the Eastern Poland. No mechanisms have been devised either to facilitate optimal conversion of other types of capitals and assets – qualifications, skills, contacts, habits, coded and tacit knowledge, attitudes – acquired by the shuttle migrants abroad. Those potentially huge resources have thus been wasted in a collective dimension. In the individual dimension, they were also underutilized because – out of the lack of other growth options – they were converted into spiraling consumption, exemplified for instance by (shocking for experts) dynamics in private car sales or private home construction in those poor regions. In addition, the spiraling consumption trajectory has negatively affected value hierarchies and social interactions in those still “traditionalist” regions.

In the third example, systematic and from 2003 systemic<sup>5</sup> action by the public authorities who privileged and finally enforced a – both! – market and bureaucratic logic in the sphere of civil society have contributed to a significant weakening of traditional grassroots organizations and self-help initiatives, especially in the countryside and small towns. The grassroots were not able to face the imposed on them requirements demanding for instance that they employ professional layers and accountants to follow the same fiscal-administrative regulations as private businesses. Neither they were able to fulfill fiscal and administrative criteria set in competitions for public funding (from the local government, central government and the EU budget) streamlined into support for providers of social services, soft

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<sup>4</sup> To make the point more vivid: the inhabitants of those rural regions – who were systemically forced to give up the production of agricultural produce utilized by themselves and were not offered instead any real systemic support to push them into more modern employment and entrepreneurship – are now forced to buy the subsistence produce on the market supplied by industrialized farms and imports, paying e.g. for potatoes, tomatoes, apples, eggs, meat and the like much higher prices than those paid by inhabitants of big cities, for example Warsaw!

<sup>5</sup> 2003 was the year when the law on public benefit and volunteering was adopted in Poland, which led to an unprecedented bureaucratisation of larger civil society organizations and collapse of many small grass roots, unable to bear the financial and administrative costs incurred by criteria of their “modernization” inherent in the law (cf. Gąsior-Niemiec, Gliński, 2007; Nicholson, 2008).

developmental factors etc. They were even more discouraged by the regulations that burdened self-help initiatives – for instance traditional rural committees or ad hoc neighbourhood groups to assist victims of natural catastrophes – with taxes imposed on private donations. Thus, the policy of “modernization” of civil society has brought about a collapse or far-reaching depletion of traditional norms of reciprocity, solidarity, self-help and co-operation in those regions.<sup>6</sup> This strategy of “modernization” must be seen as quite striking if compared with the simultaneous, quite lavishly funded, calls for the building of social capital and increasing local potential for collective action as major factors of development issued by top authorities in Poland and the EU.

It follows that continuous attempts to design cutting edge, interdisciplinary, comparative, less “loyal” to dominant paradigms and less sensitive to political correctness research initiatives should be promoted and supported in order to complement mainstream research accounts and policy analyses. Such complementary research initiatives are recommendable both at the outset of policy programmes and on an on-going basis throughout the programmes’ implementation and evaluation stages. Often, by asking non-conventional questions, using less established methodologies, focusing on the micro- or meso- instead of macro-level, registering various developmental “weak signals” as well as making use of multiple case studies and putting them in the framework of international comparisons, such initiatives are able to pre-identify at least some of the missing factors which impact on socio-economic processes. They are likely to produce valuable insights both into the causes of regional (non-)development and failures/successes of pro-developmental policies which are complementary to the mainstream analyses and recommendations (cf. POR, 2006).

Such a broadening of the research approach seems particularly needed in the case of regions whose trajectories resemble a trajectory of the Italian Mezzogiorno – “a classic example of a region where processes of the ‘vicious circle’ known from Gunnar Myrdal’s theory are constantly reinforced” (Grosse, 2004: 144; cf. Szlachta, 2007:5). Efforts to identify mechanisms responsible for the replication of such vicious circles require using a much greater variety of research approaches than practiced today if they are to succeed.<sup>7</sup> The

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<sup>6</sup> This is not to say, that there have been no merits in this policy. Rather, it is again to stress that top down administration of any kind of modernization might bring quite perverse results unless it is supported by sufficient knowledge of local circumstances and adequately adapted to them.

<sup>7</sup> These include both the more anthropological case study approaches emphasized above as well as more structural long duration approaches advocated by Kukliński (2008a,b) and exemplified e.g. by Zarycki (2008a). Combined, they may shed light on the underlying developmental barriers and emerging – often produced by systemic action – Gordian Knots as well as – making also use of collective tacit knowledge resources in the studied regions – point to feasible and rational ways of (at least partial) solving of the problems.

research initiative “Gordian Knots – The Triple Mezzogiorno. A New Trajectory of the Regio Futures Programme”, of which the present paper is part, should be considered in this context.

### **The methodological framework of the Triple Mezzogiorno research trajectory**

The proposed research trajectory will be developed taking as its starting point the methodological framework discussed during a series of conferences dedicated to the Regio Futures Programme (cf. reports by Gąsior-Niemiec, 2007a, 2007b, 2008a). The main conceptual structure of the framework has been presented in a paper by Kukliński (2008b; cf. also Jakubowska, Kukliński, Żuber, 2008a), reviewed and developed in papers by Arnaldi (2008), Amoroso (2008), Galar (2008), and Zarycki (2008a), whereas some of its elements have been empirically illustrated in analyses conducted by Domański *et al.* (2008), Ietri and Rota (2008), Rončević *et al.* (2008), and Rybiński, Opala and Hołda (2008). This basic methodological frame is constituted by an analytical matrix resulting from an interplay of four perspectives and four leading concepts, that is diagnoses, prognoses, visions, strategies and long duration, barriers to development, Gordian knots, Alexandrian solutions.

The construction, specification and filling out of such a matrix necessitates the use of a genuinely interdisciplinary social science toolkit aided by insights derived from still budding, new disciplines of knowledge production such as, for example, social foresight, regional foresight, and futures studies. Such a broadly conceived methodological machinery to expand the existing hermeneutic horizon delimiting knowledge building processes in region-focused research and policy analyses may eventually contribute to a much needed paradigm change in the field of regional studies (Kukliński, 2008b; cf. Wierzbicki, 2008; cf. also Gąsior-Niemiec, 2004; 2008b). This tentative promise is also suggested by an emphasis put on the one hand on exceeding the barriers of academic self-satisfaction, conventional wisdom and political correctness and on the other – on an increased application of self-reflection, theoretical imagination and political courage (cf. Kukliński, 2007).

The application of this new approach is to be visible both in a constructive critique of the existing approaches and the formulation of a new, long-term, policy-conscious, interdisciplinary, comparative research programme focused on future trajectories of regional development. In brief, the proposed methodological approach is hoped to go not only beyond mainstream social science analyses but also to reinvigorate the field of policy analyses and policy-making related to the problematic of regional development. Such a methodological breakthrough seems particularly needed in the case of regions labeled as persistently



backward and analyses underpinning large scale policy intervention programmes already implemented or envisaged with a view to triggering development in those regions. As mentioned in the previous part of the paper, the existing approach to such regions has not been fully successful which is evidenced by frequent incidence of both research and policy failures.

### **The case of Mezzogiorno – preliminary insights and research issues**

The case of Mezzogiorno has become one of the recurrent topics of the continuing debate over the conditions, factors and measures, causes and effects of the implementation of subsequent models and strategies of socio-economic development in Europe (cf. Gaşior-Niemiec, 2003a; Grosse, 2004). This southern part of Italy has been consistently, over decades, cited as a classic example of failed modernization, a paradigmatic instance of a peripheral trajectory of development or parasitic non-development. It has been pointed out as a most glaring instance of a region which is unable to take advantage of subsequently appearing developmental opportunities – which are probably best described by borrowing the concept of policy windows (cf. Keim, 2007) – offering a chance to actively “join in” the developmental mainstream, to “catch up”, to “move” from a periphery to the developmental core. At different times different reasons have been singled out to account for this persistent state of affairs. Ultimately, vaguely defined “initial historical conditions”, recently largely transformed into theses of lacking trust, depleted social capital and institutional underdevelopment as well as late and incomplete industrialization have dominated the discourse explaining non-development of Mezzogiorno.

Late modernization was put forward as *the* factor to establish and freeze a dual structure of the modern Italian state supposedly clearly divided into progressive and developed (i.e. industrialized) North and backward, underdeveloped (i.e. agricultural) South – the Mezzogiorno. Within the framework of a developmental paradigm equating the notion of development with the notion of modernization, the notion of modernization with the notion of industrialization, and industrialization with dominance of heavy industry, big factories and the Fordist mode of production, the Italian South almost “naturally” – according to “objective” statistical data measuring growth – constituted the flipside of the postwar Italian economic miracle. It was defined as backward and lacking, pictured as a developmental desert to be cultivated and civilized by the Italian state (and then the European Union).

The policy of *trasformismo* inscribed in the idea of exceptional state interventionism entailing direct (industrial) investment subsidies, tax wavers and so called social transfers

were the main instruments used in the strategy to modernize Mezzogiorno. Strikingly enough, this strategy – recording failure after failure – remained unchanged for several decades, to be finally incorporated as the main instrument of regional policy by the European Union implemented in Italy until mid-1990s (cf. Cersosimo, 2000 – cited in Gąsior-Niemiec, 2003a). A closer look at the history of this period of public interventionism in the Italian macro-region may yield many relevant insights to be incorporated in the processes of programming, implementation and evaluation of large scale public intervention programmes in other countries.

While it is beyond doubt that the current socio-economic problems of Mezzogiorno have deep historical roots dating back to early feudal modernization which by the XIII century made the then Norman southern kingdom one of the most efficient and productive machineries of agricultural exploitation in Europe<sup>8</sup>, the modern era state of non-development in the region was really institutionalized after the first and especially after the second world war. The basis of this institutionalization was constituted by a tacit agreement concluded between industrialists of the North and landowners of the South with an active inducement and in the interest of the nascent Italian political elites (LaPalombara, 1978: 73-74 – cited in Gąsior-Niemiec, 2003a).

The compromise involved opting for a model of a centralized but weak state which, on the one hand, facilitated or even sponsored the accelerated industrialization of the northern regions, while enabling the survival of agrarian feudalism in its southern provinces. As a result the North developed its production and consumption bases while its growing middle and working classes participated in the postwar prosperity, democratization and emancipation. In the meantime, in the South the so far existing semi-feudal structures entailing immense socio-economic disparities, asymmetric patronage relations and survival rather than growth oriented individual living strategies were frozen and/or specifically “modernized” to exploit opportunities offered by the modern Italian state. The compromise was guarded in the North by powerful economic lobbies and tacit agreement of the labour unions, while in the South it was secured by a system of tight interdependencies between landowners, the clergy, bureaucrats, and last but not least local mafiosi.

The establishment and operation of the so called *Cassa per il Mezzogiorno* constituted an epitome of the system. The notorious *Cassa* functioned as an institutional nexus for the

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<sup>8</sup> This case actually invites a comparison with the case of the Polish-Lithuanian Commonwealth’s economic miracle of the XVI and XVII centuries, the subsequent “freezing” of the agrarian and exploitative social and economic structures in Eastern Poland and the role played by that legacy in today’s backwardness of the Polish eastern regions.

financial transfers flowing from the state budget (and then the EU's budget) to the Italian South. It remained in operation for more than half a century despite several devastating evaluations of its ineffectiveness, widely publicized cases of fraud, nepotism and corruption, and exorbitant costs of its functioning. The existence of the *Cassa* was a direct consequence of the interventionist model adopted in Italy initially. Serving powerful interests it was never really questioned before its collapse in the 1990s. On the level of political declarations and policy recommendations the huge direct budgetary transfers distributed by the *Cassa* were justified by a developmental doctrine promising to cause a gradual transformation of the socio-economic relations in the South leading to establishing there a replica of the Northern model of development<sup>9</sup>.

Due to the share of area and population covered by the policy, the bulk of the state interventions ultimately financed welfare substitute transfers, i.e. artificial compensation to the inhabitants of Southern Italy, which took shape of various social benefits – unemployment, housing, social assistance, health, disability, retirement etc. *Notably, when measured on the level of individual beneficiaries those benefits would seem quite symbolic and as such could not really contribute to pushing the individuals out of the vicious circle of poverty, dependency and backwardness.* Another lion's share of the transfers was constituted by expenditure covering public investments privileging hard infrastructure, the so called public works as well as direct investment grants. The latter would often lead to erratic and short-lived greenfield industrialization of the South. Evidenced by the direction of end financial flows, this public assistance was mostly consumed by experts from the North advising public institutions as well as Northern industrialists and entrepreneurs who partly (and often temporarily) relocated their basic production units to the South in exchange for grants and tax wavers. The so called social transfers benefited the North indirectly as well by artificially increasing purchasing power of the Southerners who could buy and consume more and more goods imported from the North.

Therefore, despite some unquestioned positive (albeit excessively slow and costly) effects of the policy model, such as the progressive development of transportation infrastructure, educational infrastructure, tourist infrastructure, a general civilizational advancement and gradual alleviation of absolute poverty in many localities of the South,

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<sup>9</sup> Notably, the same type of justification to legitimize quite different policies was pronounced in Poland during the first years of post-communist transformation under the label of “transition to democracy and market economy”. Revised by the growing bulk of mainly off-mainstream social science research, today the notion and doctrine of “transition” must be seen as totally compromised. Nonetheless, the shadow of the same logic of justification may be noticed behind the German *Aufbau Ost* action – see the second part of the present paper.

several of its long-term negative consequences could be pointed out. Apart from the systematic drainage of the resources formally allocated to Mezzogiorno, the negative consequences involved *inter alia* the colonization of the pro-developmental institutions and resources by political parties and an increasing overgrowth of corrupt *catenas* fed by the funds flowing through the *Cassa per il Mezzogiorno*. The *catenas* took advantage of the funds distributed quite arbitrarily, while the clientelist relationships on which this distribution was hinged reached from the local to the national level.

Driven by particularistic interests<sup>10</sup>, not coordinated, not adapted to local conditions, and poorly prepared investments such as production plants, infrastructure projects, technology parks etc. – often initiated without preceding economic or just logistic feasibility studies – would often turn into “cathedrals on the desert”. Like never-ending “pharaoh” public works, such industrial cathedrals frequently proved unsustainable, of poor quality and/or just botched. In addition, their contribution to the prosperity, welfare, professional inclusion and personal advancement of the local population was of marginal importance, which only reinforced the dominance of the local patronage system and emigration in the survival strategies of the Southerners. Finally, despite its length, scale and resources the state (and then also EC) pro-developmental intervention in the South has not contributed to strengthening of local, regional or central state institutions. Neither has it induced an improvement in their image. Public trust in those institutions has not increased – the perception of inflated, biased, weak and corruption-prone public institutions has prevailed. The stigmatized image of the Italian South has not been changed either.

It could be thus concluded that the inflated and weak Italian state had in fact cultivated with the use of its administrative-fiscal apparatus one of the most striking developmental disparities in Europe (cf. Partridge, 1998 – cited in Gąsior-Niemiec, 2003a). The social disembeddedness and unreliability of the Italian state and regional institutions, the parasitic political class, shady arrangements linking politicians not only with businessmen but also with criminals, widespread remnants of strong feudal and patriarchal relationships in economy, administration and society, omnipresent organized crime (mafia, camorra, n’Dranghetta etc.), and weak civil society could be named as major factors facilitating and contributing to the reproduction of the vicious circle of backwardness in the South.

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<sup>10</sup> This is best illustrated by the overgrowth of so called *leggine* – short-term legal changes introduced to satisfy particularistic interests of narrow lobby groups. Another example is constituted by the practice of so called *interventi a pioggia* whereby – to at least partly satisfy expectations of their political supporters – decision makers would distribute a “shower” of odd small grants and benefits in areas politically loyal to them. In this regard, one could find more than superficial similarities between the Italian and the Polish case.

A persistently negative public image of the region might also be mentioned as an additional factor feeding the vicious circle and amplifying contemptuous attitudes to the South and Southerners. The potential of the South and Southerners to stand on their own has been repeatedly undermined in the public discourse by voicing quasi-racist tensions existing between Northerners and Southerners in Italy. In this discourse, most clearly registered first in the 1950s-1970s and then in mid-1990s, first individual *meridionali* (*terroni*) migrating to the North in search for jobs and better living and then the South, its people and institutions as a whole, have been discursively constructed not only as backward but also as by nature lazy, stupid, parasitic, disorderly, corrupt, primitive, and therefore unable to modernize.<sup>11</sup>

Given the role of those factors, the overall failure of the systemic modernization of Mezzogiorno must, however, be attributed to the main doctrinal assumption underlying the historical compromise of the post-war Italian elites. Namely, and quite apart from the aforementioned particularistic interests of the major parties involved, the compromise was based on an apparently false assumption that a model of modernization (development) tested in the North could be top down administered and mechanically grafted in the South. In other words, an external model of socio-economic processes was assumed to be universally applicable and ultimately enforceable by administrative measures. The idea of the top-down enforcement of the model was then not only undermined by the aforementioned institutional and societal vices but ill conceived in the first place (cf. Kockel, 1998, 2002; Gore, 2005).

Its conception did not recognize for instance the problem of lacking symmetry between the existing and postulated institutional (economic, social and cultural) goals and structures in the South, ignored the problem of shortage of adequate local developmental resources, especially the absence of local agents of change<sup>12</sup> as well as underrated the strength of vested interests and traditional loyalties to sustain the semi-colonial status and semi-feudal order in the South. The extraordinary pro-developmental measures sustained rather than

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<sup>11</sup> Noteworthy, similarly constructed discourses have been produced also to stigmatize Eastern Germany and Eastern Poland – the German Ossi and the Poland B discourses, respectively. Cf. Buchowski (2006) who – using the model of Orientalist discourse – demonstrated how dominant discourses in Poland constructed the losers of transformation in the country as illegitimate actors who are denied the right to articulate their interests and implement rational strategies of survival because *these seem incongruent* with the dominant views on transformation.

<sup>12</sup> Indeed, in the South neither of the potential agents of North-like change (modernization) existed: working classes and industrialists were not numerous and weak while intellectuals largely followed the traditionalist heritage – the progressive ones emigrated to the North, just as Gramsci did. Civil society has remained weak and fragmented, unable to develop independently of political patrons and to substitute for the traditional structures of dependencies and linkages – of feudal, Church and mafia origin. Moreover, the implemented policy did not provide sufficient incentives and/or resources to trigger either large scale structural changes in the socio-demographic profile of the South or at least to stimulate/enable a breakthrough in individual living strategies available to the Southerners and to initiate seeping transformation in this way.

eradicated the traditional culture of dependency and paternalism in the South, “enriching” it with modern political fraud, corruption and crime. They did not succeed either at the macro- or at the micro-level: the logic behind economic and social structures in the South as well as the logic animating living strategies of the Southerners have practically remained unaffected (cf. Banfield, 1958; Gambetta, 1988; cf. also Gaşior-Niemiec, 2003b; cf. also Zarycki, 2008). The system of extraordinary measures devised for Mezzogiorno led thus to an institutionalization of non-development propelled by alienated administrative institutions, non-civic (“pre-modern”) social relations, exploitative economic structures, and politically “customized” administrative-legal regulations, all embedded in the logic of an imitative approach to development.

Enormous benefits obtained both by powerful interests groups, local politicians, and other “smart” beneficiaries of the public assistance system would legitimize this model of counter-effective interventionism for decades. Territorial self-governments, kept legally and financially over-dependent on the state administration, would fell prey to the aforementioned *catenas* using their budgets and jobs to safeguard political support for the governing parties (most notably the Christian Democrats as long as the party existed). Moreover, their activities were often either subordinated or substituted by private “governments” of local patrons (cf. Varese, 2001). The public sphere was marginalized and to a significant degree colonized by organized crime (cf. *ibid.*; Partridge, 1998; Cersosimo, 2000; Donolo, 2001 – cited in Gaşior-Niemiec, 2003a). Poor economic performance, expanding informal economy, emigration as an individual, future-oriented survival strategy, and very low trust in people and institutions continued to characterize the South.

A deeper motivation to change the state of affairs was lacking both inside and outside of the macro-region until mid-1990s when the Italian state experienced a dramatic political and fiscal crisis and the system of extraordinary intervention in the South, including the notorious *Cassa per il Mezzogiorno*, was partially abandoned by political successors of the utterly compromised Christian Democrats. The reforms were forced by several, partly independent factors, such as the challenge of financial discipline imposed by the EU with the prospect of Italy joining the European Monetary Union, negative evaluations of the EU-financed pro-developmental programmes in the South, demands by the Northern regionalist party<sup>13</sup>, the dissolution of the Christian Democrats as the stronghold of the local-to-central

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<sup>13</sup> This was *Lega Nord* which entered the Italian Parliament, formed the governing coalition with populist Berlusconi’s *Forza Italia* urging for more competencies for the territorial self-government and demanding so called fiscal federalism.

*catenas*, and last but not least, the independent *mani pulite* movement which resulted not only in several direct blows to the mafia but also in at least temporary and partial purging of the Italian politics and administration of many corrupt individuals, including the ones connected with the South.

The curbing of the system of extraordinary intervention in the South did not, of course, resolve the very real problem of poor developmental performance of the macro-region. Rather, it has initially led to a stalemate caused by a clash between two opposing discourses and public policy lines underpinned by two antagonistic discourses: the discourse of the North which pictured the South as parasitic and doomed to backwardness, and the discourse of the South – produced by new intellectual (cultural and economic) elites which pictured Mezzogiorno as a victim of colonial exploitation by the North (cf. Cassano, 2002; Gašior-Niemiec, 2003a, 2008d). Simultaneously, at the level of politics and policy-making, a trend towards further territorial-administrative decentralization and the ensuing segmentation of pro-developmental measures could have been noticed in accordance with the overall tenor of a paradigm change underpinning the reforms of the EU structural policy from the end of the 1990s onwards.

At the level of politics, a series of reforms justified by requirements of decentralization, empowerment of local leadership, and finally federalization of the state was thus initiated<sup>14</sup>. Institutional and organizational arrangements typical of so called new modes of governance started to be proliferated as well (cf. Gašior-Niemiec, Gliński, 2007; Gašior-Niemiec, 2009). At the level of pro-developmental policy measures, a range of instruments to support and trigger growth of small and medium enterprises, their clusters, so called knowledge milieus, business environment and civil society organizations have started to be implemented in all regions. Building networks, trust and social capital – elevated now to key factors of growth and development – have featured in most of the new generation public programmes to support development in regions, including Mezzogiorno (cf. Gašior-Niemiec, 2008c).

These political trends have continued into the 2000s, having at least at the level of analyses produced a significantly changed map of regional development in Italy. Noteworthy, this has led to progressive analytical fragmentation of the so far holistic picture of the Italian macro-region, while in the public discourse trends have meandered. The Northern quasi-racist

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<sup>14</sup> Interestingly, all this happened during the period when the political pendulum swayed in Italy visibly towards the populist political right – a comparison with Poland (and to a lesser extent with Germany) could be quite enlightening in this respect.

discourse became subdued once the political power of the *Lega Nord* was wasted by its leader, its undertones, however, including emphasis on the civilizational strengths of the North and weaknesses of the South – now articulated in terms of entrepreneurship, meritocracy and territorial civil society, have found their way into the public discourse in Italy and sedimented in the public sphere of the country. The Southern discourse of martyrdom has in turn slowly evolved into a discourse of cultural specificity of Mezzogiorno, including for instance both attempts to elaborate a new holistic (positive) image of the mega-region rooted in its multi-cultural past and maritime heritage (cf. Cassano, 2002; Fofi, 2001 – cited in Gaşior-Niemiec, 2003a), and attempts to reinterpret the South's institutional heritage, including the *latifondo* (cf. Petrusiewicz, 1989 – cited in Gaşior-Niemiec, 2003a) and the mafia (cf. Gambetta, 1988, 1993). The former started to be often presented in terms of rediscovered economic assets, while the latter as endogenously produced social institutions, quite functional in the existing circumstances.

Overall, the new political measures and the new academic discourse (cf. Putnam, 1993; Trigilia, 1995; Crouch, Trigilia, 2002 – cited in Gaşior-Niemiec, 2003a), focused on local entrepreneurship, innovation and social capital, have strengthened the discourse in which Mezzogiorno falls apart into several regions and sub-regions whose characteristics – couched in the jargon of “competitiveness” – vary. This progressing fragmentation may, on the one hand, be seen as a breakthrough in the so far one-sided and pessimist perception of the Southern pattern of non-development. On the other hand, it might, however, be interpreted with more caution as a sign of uncovering (and legitimizing) an uneven, archipelago-like pattern of effects produced by the new policy measures typical of post-fordism and postmodernization. Moreover, in view of the related increased internal competition and rivalry between the different sub-regions for the new public support measures, fears may be voiced that the new model of fragmented policy support might actually further contribute to a reproduction and/or reinforcement of an older pattern of *localismo* which historically blocked attempts at supra-local collective action in the South, facilitated its subjugation to the central state bureaucracy and exploitation by external economic actors (cf. Gaşior-Niemiec, 2003: 132; Romanelli, 1988; Levy, 1996 – cited in Gaşior-Niemiec, 2003a; cf. also Aniello, 2002).

As mentioned, on the one hand this discursive, political-analytical and socio-economic fragmentation of Mezzogiorno is certainly linked to the change of the developmental model promulgated now in the South.<sup>15</sup> The macro-industrial Northern model has now been

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<sup>15</sup> On the other hand this discursive, political-analytical and socio-economic fragmentation of Mezzogiorno could also be related to the aforementioned, slowly intensifying effects of the independent and off-mainstream research



substituted with the SME-focused developmental model (nurturing clusters and networks of local production systems), which is, this time, imported from the so called *Terza Italia* – Third Italy (cf. Gašior-Niemiec, 2003: 133-135; Bagnasco, 1977 – cited in Gašior-Niemiec, 2003a; cf. also Porter, 1990). The new model – being focused on the local and not so much regional structures and processes as well as emphasizing a positive role of traditional ties, linkages and localized patterns of interaction and co-operation – might seem much better suited to the endogenous conditions prevailing in the South. However, on the margin, the problem of continuing interception and exploitation of the new policy window and the new measures supporting development by traditional networks (systems of patronage, *catenas*) has also been noticed. In the context, the problem of institutional underdevelopment and poor social capital has been strongly voiced, pointing to a supposedly crucial difference between the Third Italy and the South concerning the features of institutional milieus and socio-economic resources needed for the success of the SME-focused model of growth.

In a comprehensive analysis of the South's institutional capacity, Donolo (2001) has for instance identified several of dysfunctional characteristics which in the long run may undermine the efforts of the new policy of development. Donolo's list includes the continuing strong influence of national political parties on regional and local territorial administrations, the cult of administrative jobs as a life-long career, the overgrowth of local and regional bureaucracies, a low level of their technical skills, predominance of case-by-case proceedings over systemic procedures, non-transparent decision-making and poor accountability of territorial administrations, widespread corruption, a preference towards adaptation rather than innovation, lacking overall visions of development and non-existent strategic discourse to facilitate concerted collective action (cf. Gašior-Niemiec, 2003b; Rončević, 2008). The resulting state, which he dubbed *non-governo*, translates into a dispersion of pro-developmental measures, lacking synergies and sustainability, depletion of public goods, erosion of trust, instability of regulations and priorities, and – as already mentioned – the reinforcement of old clientelist patterns of interaction (Donolo, 2001: 35 ff).

Summing up, at the end of the decades' long policy of the large scale public intervention programme and *after and despite* the change of the developmental paradigm underpinning the policy, the Italian Mezzogiorno, occupying about one third of the territory of Italy and inhabited by more than 36% of the Italian population, is still said to contribute on average only about 25% of the Italian GDP, 8% of the Italian exports, 14% of the revenue

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and studies which are case by case uncovering the living diversity of socio-economic and cultural micro-processes occurring in the particular sub-regions of the South.

from tourism, and 22% of the revenue from industrial production (Grosse, 2004: 145-146). It is characterized by about 60% of the Italian GDP per capita, the highest rate of population depending for survival on retirement and social benefits. It houses more than 60% of the total Italian unemployment, whose level in some areas exceeds 25% (e.g. in Calabria), despite the fact that the demand for several categories of employees has for years been not satisfied in the regional labour market. Moreover, it is hypothesized that the still high share of agriculture in the employment structure, nearing 10% (ibid.), is indicative of further hidden unemployment.

The South does not produce any recognizable trade marks and consumes mostly goods, services and money imported from the outside of the macro-region (cf. Levy, 1996: 21 ff; Davis, 1996; Paniccia, 1998; Donolo, 2001 – all cited in Gąsior-Niemiec, 2003a). In the meantime, the stream of investments in Mezzogiorno, *which has actually never exceeded 10% of the overall investment allocation in Italy*, has been systematically dwindling (Grosse, 2004: 147). On the other hand, the shadow economy is systematically expanding in the South, its territory and structures receive and make use of repeated waves of illegal immigration both from Central and Eastern European (post-communist) countries and from Africa, socio-economic differentiation and life style differences grow striking, mafia-like organizations thrive, public sector (and political party) employment is on an increase while the quality of public services and public goods is by and large declining.

Politically, apart from marginally important Sicilian separatist movement, the South remains colonized by national political-administrative apparatuses and has not been able to speak in one voice in support for its authentic interests. In the circumstances, with a bit of an exaggeration, it might be stated that apart from the widely publicized cases of notorious corruption, mismanagement, and misplaced, short-lived investments, the subsequent policies entailing large scale public intervention in Mezzogiorno have little, if at all, contributed to triggering development there. They have certainly not managed to establish in the macro-region conditions that could facilitate endogenous growth *even after the change of the developmental paradigm and the related change of the policy objectives and instruments*. As noticed by some recent analyses:

„A scientific and R&D basis is missing here, while a majority of innovations in production or organization originates outside of the region. About 70 % of overall costs related to the implementation of innovations is consumed by buying licenses, importing necessary equipment and adapting the imported solutions. In this way the firms from Mezzogiorno are technologically dependent on the other parts of Italy or foreign countries (Evangelista *et.al.*, 2002). As a result, the overwhelming majority of private enterprises in the

South is constituted by units of firms located in other regions of Italy. These units are dependent on access to external investment capital and external technologies; they are not independent in terms of decision-making or in terms of their strategies of development; they only insignificantly contribute to the development of local cooperatives (Giunta *et al.*, 1995)” (Grosse, 2004:148-9).

In consequence, it might be hypothesized that it is still predominantly external economic actors who benefit from the investment grants, tax privileges, and technology transfer support instruments available in Mezzogiorno. Similarly, the human capital support measures – such as provisions for professional and vocational training *and* dwindling but as yet continuing social transfers to subsidize labour costs – are directly or indirectly taken advantage of by external and not indigenous actors. We could still add to the listing of the unintended beneficiaries the whole external political-administrative machinery which is endowed with responsibility for the running of the public policy programmes. Adding rampant mass consumption of imported and smuggled goods, out of the major beneficiaries located in Mezzogiorno, we might single out political-administrative networks attached to public institutions and criminal networks operating both in the formal and shadow economy.

In the meantime researchers tracing local and regional clusters and poles of growth in the analyzed macro-region on the one hand highlight cases like this of Abruzzo, where unprecedented economic growth has been attributed to the dominance (“chieftain rule”) of a political charisma and client-patron influences exercised by a regional leader (cf. Grosse, 2004: 161). On the other hand, several other local endogenous growth centers, which have so far been identified across the particular sub-regions included in the collective of Mezzogiorno, struck analysts as surprising and inexplicable, i.e. often emerged without any connection to the public policy measures implemented in Mezzogiorno over the decades.<sup>16</sup> In conclusion, wherever – within the perimeter of the formal economy and outside the perimeter of political patronage – isles of growth and innovation have been identified in Mezzogiorno, they seem to have developed without much formally operating external assistance.<sup>17</sup> Incidentally, this phenomenon is to an extent reminiscent of the initial circumstances in which an unexpected

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<sup>16</sup> Compare conclusions of the analysis of the Eastern German case below.

<sup>17</sup> Compare the radical theoretical claims concerning autopoietic regional systems expressed for instance by Röpke (2006) and Assman (2006) as part of their critique aimed at the theoretical and doctrinal foundations of the Eastern German *Aufbau Ost* programme.

socio-economic boom occurred in the regions of Third Italy (*Terza Italia*) which had been for long completely overlooked by the Italian machinery of state interventionism.<sup>18</sup>

Just as more research is needed to identify factors stimulating this unassisted endogenous growth in the South, on the other hand, more research is still necessary to look into the causes of the unruffled dominance of patronage which still seems to characterize the majority of the Mezzogiorno sub-regions, propelling the phenomenon of ever expanding shadow economy there. A fair degree of moral courage and political incorrectness is needed to investigate deeper their potential relations with the system of public interventionism. With a reference to those issues, despite moral contempt expressed by the majority of mainstream analysts, it must be stated that the informal and shadow socio-economic processes occurring in the South of Italy appear to be characterized not only by powerful reproduction mechanisms but also by high rates of growth and innovation (cf. Kockel, 1998, 2002; cf. also Aniello, 2002). Therefore, it seems clear that as long as roots, operational logics and social viability of those mechanisms and processes remain under-researched and overlooked, public intervention programmes are likely to miss their objectives and fail, even if the aforementioned problem of the (unintended) external beneficiaries of such programmes is mitigated.

This threat seems especially pronounced in the case of the new generation policy of development whereby a lot of measures are devised to stimulate and reinforce so called soft social and institutional developmental factors and resources related to the former (cf. Adam *et al.*, 2005; Pezzini, 2008). Therefore, before such measures are implemented in regions like Mezzogiorno, definitions and measurements of the factors, resources and instruments to support them need to be refined basing on new insights into the persistent puzzle with which researchers are faced in such “backward” regions: whereas it is claimed by policy analysts that adequate soft (socio-cultural and institutional) resources are missing in the formal

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<sup>18</sup> Instead, analysts have devised the role of local political and social institutions as *the* factor behind the unexpected growth in the regions of Third Italy: „The activity of local self-governments in the economic field and especially dense networks of cooperation with associations of entrepreneurs constitutes an example of social capital in the regions of Third Italy. What is, however, unusually important is the fact that this capital is localized on the level of local communities, and not regional ones. Such an arrangement of social relations seems in agreement with the theoretical assumptions of the industrial district and the related conceptions of flexible specialization. On this basis it should be concluded that the role of local authorities in local economic development is fundamental. A whole system of local institutions seems equally important, such as associations of entrepreneurs, R&D centers and financial institutions. They form an infrastructure which is crucial for development. They are an example of social capital indispensable for the development of local and regional economies” (Grosse, 2004: 160). Interestingly, the formal weakness of local self-governments in the flowering period of the Third Italy as well as the presence of both clientelism, exploitation and shadow economy in its sub-regions is only rarely mentioned in the context – a good example of partial analytical blindness described in the introductory part of the present paper.

systems of Mezzogiorno and thus the growth of the macro-region is blocked, at the same time it is quite clear that informal socio-economic systems of the macro-region manage to survive and even thrive exactly because of the abundance and availability of this kind of soft resources.

The challenge resides here especially in posing and answering the question what mechanisms are responsible for keeping the resources in the informal rather than formal economic and social networks. In other words, the challenge involves, *inter alia*, looking into factors contributing both to the prevalence of zero-sum games in “backward” regional contexts, including their civil society and institutional milieus, and the related specificity of the logic of social capital formation, reproduction and circulation as well as its conversion into other types of capital there (cf. Gašior-Niemiec, 2004; cf. also Zarycki, 2008b). Notably, apart from the inspiring Bourdiean theoretical apparatus (cf. *ibid.*; Bourdieu, 2001), Olsonian (1965) rather than Putnamesque (1993) theoretical framework to study collective action would seem much more applicable in policy-related analyses carried out in such regional contexts for the purpose of an improved design of pro-developmental policies aimed at socio-cultural infrastructures to enable economic development (cf. also Banfield, 1958; Gambetta, 1988, 1993).

Finally, analyses broader than conclusions based on conventional surveys are required to further the line of enquiry focusing on potential linkages between politics and economy, exemplified for instance by the relation between so coveted within the current developmental paradigm good as an interpersonal trust as a factor determining cooperative behaviour, networking, knowledge sharing and building, and innovations. This line of research is also particularly needed with a view to the on-going promotion of new modes of governance and the role these are supposed to play in new regional development policy models (cf. Gašior-Niemiec, 2008c, 2009). In particular, basing on preliminary research (*ibid.*; cf. also Fidrmuc, Gerxhani, 2006 and Varese, 2001) a hypothesis stating that the perception of strong, trustworthy, and fair public (state) institutions is a bottom-line prerequisite for an emergence of interpersonal trust, norms of reciprocity and, generally, social capital contributing to collective development of a given society should be tested.

Results produced by this stream of research could for instance bring at least some answers related to the aforementioned puzzle of the persistent reproduction and prevalence of corrupt/criminal personal and institutional arrangements in the sphere of socio-economic processes occurring in so called backward regions. New research is also certainly needed to focus on survival and growth strategies available to inhabitants of such regions and their

relation to premises, objectives and instruments inherent in public pro-developmental programmes implemented there. Lastly, new insights could be gained by investigating more thoroughly the already mentioned issues such as the role of strategic discourse in strategies of regional development (cf. Gašior-Niemiec, 2003b, 2004; POR, 2006; Rončević, 2008) and the weight that the regional image – stigmatized or attractive – may play in bringing in a developmental breakthrough (cf. Gašior-Niemiec, 2003b, 2004; Gašior-Niemiec, Szomburg, Zarycki, 2008).

### **The case of Eastern Germany – preliminary insights and research issues**

Although less prolonged in time and so far less publicized than the case of the developmental policy failure in the Italian Mezzogiorno, the case of Eastern Germany seems no less striking or dramatic. On the contrary, from the vantage point of the Polish programme to support development of Eastern Poland to be implemented in the five most “backward” regions of the country, the fate of the German *Aufbau Ost* programme should be all the more instructive. Although the Eastern German regions cannot be directly compared to the eastern Polish regions in terms of their starting economic conditions, the scale of public intervention implemented there or the habitus of the regional population (cf. Gašior-Niemiec, 2004), there are several structural similarities between the two cases.

The similarities include *inter alia* the quality of human resources, institutional legacies of real socialism, depleted infrastructures, and peripheral location of the regions on the maps of their respective national territories. In addition, both eastern German and eastern Polish regions face quite similar socio-economic challenges, such as mutually related processes of depopulation, ageing and pauperization, decline of small and medium urban centers, growing unsustainability of transportation, communal and social infrastructure, and bad public image. Therefore lessons derived from analyses of the Eastern German developmental policy failures ought to be studied with particular attention in Poland.

The more recent analyses of the results produced so far by the German *Aufbau Ost* programme (cf. Lentz, 2007) provide an interesting insight into the experience of more than 150 billion euro annually worth public intervention in an area designated as backward. Notably, just as in the case of the Italian Mezzogiorno, several eastern German Länder have been lumped together into a single region for the sake of the pro-developmental policy without sufficient attention given to their diversity. A uniform “watering can” principle has

been adopted which basically favoured three types of instruments to be applied in the eastern Länder – direct budget transfers to ease the social costs of economic restructuring (basically, to compensate for the soaring unemployment and bring some improvement in health and educational infrastructures); public investments in transportation and tourist infrastructure, and automatic direct investments grants available for private investors in the German East. More recently, a stream of funding has been redirected more towards social and human capital building projects as well as fostering the creation of knowledge and innovation milieus.

Despite gigantic funding, the two principal objectives inscribed in the *Aufbau Ost* programme have not been achieved – the aim of equalizing the quality of living conditions in the West and the East of Germany has already been called not realistic; the aim of triggering sustainable development in the eastern regions has been described as difficult (cf. Lentz, 2007). Uneven, scattered and periodic growth, rapidly growing interregional and intra-regional disparities, continuing outmigration of younger and better educated population, continuing high unemployment, unsustainable subsidized investments and counter-effective subsidized employment, progressing decline of urban centers, ambivalent consequences of upgrading the existing R&D and educational systems, low rates of innovation, lacking consensual collective visions of development, increasing social frustration, and the persistency of bad public image of the regions may be quoted as net results of the grand public policy design (cf. *ibid.*; Assman, 2006; Röpke, 2006).

It is worth adding that the strategy of increasing the attractiveness of the eastern Länder for investors basing on low costs of labour and heavy investments in infrastructure has failed in the face of unceasing competition of yet “cheaper” regions – Polish, Ukrainian, Chinese (cf. Schädlich, Wagner, 2007: 22). Likewise, „the system of automatic investment grants is stimulating massive windfall gains (*Mitnahmeeffekte*), because these grants lead to each firm getting public money for any kind of private investment, with no regard to the impact of the investment on regional economic development, and without regard to the question of whether a firm would also have invested without public support” (Rosenfeld, 2007: 87; Schädlich, Wagner, 2007: 12). Moreover, an appearance of not sufficiently transparent arrangements within the framework of the *Aufbau Ost* as well as an appearance of parasitic actors and networks within its perimeter is noticed.

On the other hand, the more recent strategy basing on the EU fashion to promote the creation of regional systems of innovation is evaluated as equally ill conceived. “Leaving the fiscal problems of Federal Government aside for a moment, a decontextualised innovation initiative like this focusing only on *Learning and Higher Education* would considerably

aggravate the problems this Innovation Resolution proclaims to solve (i.e. to transform Eastern Germany into Innovative Region *in toto*). The reason for this is quite simple to see: the better-educated people from eastern Germany would certainly take advantage of new opportunities in more extended trans-regional labour markets and strive for better jobs. These more challenging and attractive jobs are located mostly in the West. Facit: Outmigration and the loss of human resources would escalate through improvement of the human resource level – leading to a severe *governance* paradox in the field of education and knowledge politics here” (Mathiessen, 2007: 116).

German analysts generally warn against a tendency to invest in the creation of decontextualized, i.e. not emerging from the local milieu, “growth clusters” (ibid., cf. also Röpke, 2006; Assman, 2006). This warning should be also related to plain figures which show that new investors in the eastern Länder neither utilize the existing academic and R&D resources there nor plant their own R&D units alongside the low cost production, low-skill service centers, wholesale and retail units relocated under the schemes of subsidized investment to Eastern Germany (cf. Schädlich, Wagner, 2007: 20 ff). On the other hand, the analysts notice some endogenous regeneration and self-sustained growth in many localities which used to be leaders under the previous (state socialist) regime. This is adduced as an argument supporting the view that in principle public support should only be provided wherever a genuinely endogenous growth potential has already emerged (Kawka, 2007: 53).

A similar in terms of conclusions, albeit much more radical, theoretical line of argumentation is voiced by theorists like Jochem Röpke and Jörg Assman who argue for a need to completely change the paradigm on which the logic of public intervention programmes in backward regions is based (Röpke, 2006; Assman, 2006; cf. also Kukliński, 2008a). The so called *Münchhausen Chance* is a figurative encapsulation of a theory of radical endogenous growth basing on the one hand on the Schumpeterian logic of creative destruction (and emerging from it spontaneous innovation), while on the other – on the Luhmannian theory of autopoietic social systems. According to this theory, external factors can never trigger development of a system if they are imported to it in terms of an input logic, i.e. with a purpose of creating a pre-defined new developmental dynamics within the given system. In other words, patterns of development are strictly specific and system-bound, that is growth can occur solely as a result of autopoietic reconfiguration/creation of developmental factors which are internal to the system. Out of the factors, an emergence of innovators and



innovative entrepreneurs able and willing to implement innovations on a larger scale is claimed to be crucial.<sup>19</sup>

While this approach seems to altogether question the value and purpose of external public intervention measures applied in lagging behind regions so far, the German analysts prove that it might lead to elaborating a less radical and potentially very useful approach to regional development based on identifying, testing and supporting endogenously developed innovations. The main merit of the proposed approach resides in the fact that it allows for simultaneous and relatively cheap experimenting with multiple sets of emerging economic and social innovations before any large scale public policy programme is implemented there. This approach is exemplified by Ulf Mathiessen's concept of spatial pioneers as an instrument to identify and support innovators and innovative entrepreneurs of various sorts who appear in backward areas driven by a will to experiment with novel patterns of socio-economic regeneration (Mathiessen, 2007).

According to the German analyst, one of the measures to test the feasibility of endogenous development in backward regions "can be the attraction and enhancement of spatial pioneers. By this we do not mean intergalactic astronauts but very down-to-earth people from heterogenous competency fields (design, arts, and crafts, bio-farming, high-tech SMUs, alternative tourism, remigrated nobility and peers etc.). They are all connected via micro-networks, they start to trickle into the depopulated regions of eastern German states, trying to expand non-statuary action fields and invent new functions for these de-functionalised spatial areas. For the most part they are working temporarily in project-bound innovation networks. Besides these 'real life' effects, spatial pioneers can have an interesting *heuristic* impact on the regional sciences, for they *invent* and *reconstruct* new functions in structurally feeble regions – mostly on their own account – showing regional science, what works and what does not work within these difficult spatial arrangements and cultural landscapes" (Mathiessen, 2007: 118, emphasis added – A. G.-N.). Resembling in spirit Richard Florida's concept of creative class, the German researcher's concept seems richer, more functional, and – last but not least – much more adaptable to the reality of backward

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<sup>19</sup> In this context one may, however, emphasize the crucial role that availability of financial capital plays for the success of both innovators and innovative entrepreneurs. In the first case, the availability of so called patient capital is vital as it allows creativity to thrive independent of day-to-day pressure. In the second case, the availability of venture capital allows for imaginative experimentation in the sphere of innovative implementation.

East European regions where cosmopolitan metropolises of which Florida writes are far and few between.<sup>20</sup>

### **The case of Eastern Poland – preliminary insights and research issues**

The background for building the case of Eastern Poland within the Triple Mezzogiorno research trajectory has been prepared not only by an impressive volume of mainstream macro-level analyses (cf. *Ekspertyzy* ...) but also by plentiful, often fragmented, directly non-additive (and unfortunately dispersed) exploratory research on particular socio-economic, political and cultural aspects of the five regions which have been compounded into a single entity – the region of Polska Wschodnia for the purpose of the large scale public intervention program (2007-2013). Other valuable background studies, directly relating to some elements of the proposed methodological framework, have also been initiated by Jałowiecki (2008) and Zarycki (2008), both looking into the *longue duree* of the Polish space. Dispersed policy analyses, which have been produced with a reference to earlier, publicly supported pro-developmental programmes in these five target regions, ought to be studied with a renewed interest alongside the analyses and interpretations coming from the other two cases, that is Southern Italy and Eastern Germany. More systematic research motivated by concepts such as the concept of spatial pioneers is also necessary – its design and implementation would be greatly facilitated by support offered to the establishment and operation of independent “regional observatories” (cf. POR, 2006).

All such resources and data need then to be re-examined with a view to the four dimensions and four leading concepts on which the Triple Mezzogiorno research framework is hinged, that is diagnoses, prognoses, visions, strategies; long duration, barriers to development, Gordian knots and Alexandrian solutions. Nonetheless, an adequate amount of time and resources is needed to fully elaborate and refine the promised new, comparative methodology of the Triple Mezzogiorno research programme. This effort requires not only interdisciplinary mobilization of the Polish team of researchers but also a direct involvement

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<sup>20</sup> My exploratory research carried out in the Eastern Poland already seems to confirm the usability of the concept. “Spatial pioneers” found in the Polish regions such as Podlasie, Podkarpacie or Warmia and Mazury include a new generation of entrepreneurial settlers coming from Warsaw, Cracow and other big cities: writers, artists, academicians, children of migrants, representatives of well educated middle classes, former nobility. Examples of “experiments in creative development” that such pioneers have authored are numerous: publishing houses, eco-farms, living theatres, local community schools, social employment cooperatives, banks of free time etc. The category of spatial pioneers there includes also some percentage of recent shuttle migrants who, back in their regions, developed small enterprises basing on knowledge and skills acquired abroad turning e.g. into artistic blacksmiths, pizzeria owners etc.

of analysts representing an interest in the two other two cases – Eastern Germany and the Italian South.

### **The proposed activity map**

The proposed research initiative has three basic aims which act as frames organizing its structure.

First, it is to test and refine the theoretical and methodological capacity of the proposed general framework to analyze regional development which has been outlined in Kukliński's paper (2008) partly in connection with Rybiński, Opala, Hołda's (2008). The core of this analytical framework is captured by a matrix of hypothesized dependencies arising from juxtaposition of the following main concepts:

- long duration,
- barriers for development,
- Gordian Knots,
- and Alexandrian Solutions.

The challenge here resides in testing not only the theoretical soundness and analytical capacity of the proposed definitions of the respective principal concepts, especially as they are to be applied to the regional level of analysis (indicated by the notion of the “Triple European Mezzogiorno”), but also in probing the mutual compatibility of the concepts sustaining the matrix, and the analytical productivity of the matrix as a whole.

Furthermore, the conceptual and matrix analyses should be complemented with broader references to overarching theoretical and political debates on the notion of development and its major inversed correlates: underdevelopment, non-development, and backwardness. Likewise, a discussion of measures of development must be presented. It is assumed that these broader references, constituting a crucial but mostly hidden factor guiding the logic of particular analytical frameworks and studies, need to be brought to light and openly discussed. Otherwise, as it is argued, proposed analytical frameworks as well as policy narratives and pro-developmental programmes, which are today essentially built on research animated by the former, risk obfuscating and/or misnaming developmental goals to which they are (should be) tuned. Moreover, the effectiveness of the policy programmes cannot really be analyzed and evaluated without the articulation of assumed developmental goals – formulated in the short-term, medium-term and long-term horizon. This is particularly

important in the case of the backward regions where most often than not an imitative approach to development is taken.

Second, the planned research initiative is to put the proposed analytical framework to an empirically informed test by using it to analyze and compare some of the available comprehensive “research” and “policy” histories of the three manifest cases of the supposed durable European *regional non-development*, i.e.

- Southern Italy
- Eastern Germany
- Eastern Poland.

The analyzes will include an overview of both statistical data on the “Triple European Mezzogiorno”, which are supposed to measure the degree to which the respective regions have/have not “caught up” with their national and European “developed cores”, and dominant scientific and political discourses informing the policy-making addressed at the regions. An effort will be made at carrying out a critical review of these data not only from the point of view of the three particular “isolated” case studies, but also aimed at identifying some common features of the three cases as they are framed by the dominant discourses. At the same time, at least some of the neglected and missing aspects of the majority of the existing regional development analyses, policy recommendations should be pointed out.<sup>21</sup>

In addition, on the basis of the existing and hypothesized evidence from the “developmental history” of the Italian Mezzogiorno, Eastern Germany and, partly, Eastern Poland, so far, one of the basic questions asked usually on the grounds of the classical Roman law should be put as mandatory in evaluative analyses of any publicly-funded programmes to support regional development. The question reads: “*Cui prodest?*”, or else: “Who benefits?”. An accurate, honest and unbiased answer to this question could in several instances reverse the tenor of policy evaluations, for instance by pointing to the fact that the pro-developmental measures are mainly consumed by actors placed outside of the targeted regions. However, in general a new methodology of measuring costs and benefits generated by public programmes to support development is needed.

This methodology must first of all encompass all three time-horizons (short-, medium- and long-term) as well as enabling identification of a whole chain of beneficiaries of policy programmes, not being satisfied solely with immediate beneficiaries, or so called literal end-users. Also, it ought to be capable of taking into account the fact that costs generated by the

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<sup>21</sup> Cf. the concept of spatial pioneers discussed above.

public development-support programmes are as a rule converted into some actors' gains. Moreover, to overcome the usual quantitative and econometric bias, this new methodology of costs and benefits might need to incorporate at least some of the soft, anthropological techniques and measures, which have already proved its value in research on the pre-accession assistance in Poland (cf. Wedel, 1998; Dunn, 2007). Otherwise it could for instance make a better use of the Bourdiean theory of capitals (cf. Gąsior-Niemiec, 2004; Zarycki, 2004).

Third, the proposed research initiative is to formulate – on the basis of the aforementioned analyses and reviews – a set of recommendations focused on the regions of the so called Polish “Eastern Wall” both as an instance of the “Triple European Mezzogiorno” and a particular case in the framework of the Polish regional scene. The recommendations should in particular entail:

- 1) a call to incorporate the insights flowing from the comparative research on the Triple European Mezzogiorno into the body of assumptions underpinning the long-term regional strategy of development of Eastern Poland;
- 2) a call for initiating an extensive *long-term* comparative research programme on regional development in Poland, which should on an on-going basis inform the policy-making and policy-implementation agendas, especially at the regional and national level.

The former call is justified in Poland in particular by the need to incorporate fresh insights and conclusions derived from novel analyses of conspicuous failures and some unexpected successes of the two major large scale region-development programmes in the European history, that is the Italian Mezzogiorno programme and the German *Aufbau Ost* programme at the moment when a large pro-developmental programme – comparable in relative terms – is about to be started to address regions of Eastern Poland.

The latter call is justified by a striking absence of research initiatives that could produce a long term, dynamic analytical picture of Polish regions and their developmental processes – no Putnamesque or Bourdiean research programme has been implemented so far. This absence translates into a weakness of diagnostic and prognostic capacities of the Polish regional actors (cf. Jakubowska, Kukliński, Żuber, 2007 and 2008) as well as a weakness of

the many currently prevailing research initiatives which are carried out in the context of the policy of regional development.

The main of those weaknesses, whose degrees empirically vary, might be specified as follows:

- a) lacking long-term orientation of the regional research, resulting in incompleteness and fragmentation of the available data on regions, which reinforces the short-term policy perspective;
- b) lacking holistic orientation of the regional research, resulting in one-sidedness (usually “economization” and macro-level perspective) of the interpretations and conclusions based on the research findings, which further reinforces the sectoral and macro-level policy perspective;
- c) lacking multi-level orientation of the regional research, resulting in the ignoring of the impact of global-to-local contexts for regional development, which hinders identification of many of hidden factors and actors contributing to regional development/non-development;
- d) lacking embeddedness of the regional research in the respective regions, resulting in the clash between the exogenous and endogenous developmental diagnoses, prognoses, and methodologies of the implementation of developmental options, which reinforces the colonial paradigm inherent in most of the policy perspectives;
- e) lacking on-going flows between the regional research institutions and regional public and private developmental agents, resulting in dysfunctional lags between diagnoses and actions, which in particular undermines the effectiveness and/or purposefulness of many short- and medium-term policy measures, such as for instance local labour market policies;
- f) lacking public awareness of the problematic of regional development, resulting in the reinforcement of short-term life strategies, both on the level of enterprises and individuals;
- g) lacking institutional trust in Poland, resulting in charges leveled by the public against the regional authorities concerning their supposedly instrumental (occasional) production and use of selective regional data to justify e.g. the allocation of public support.

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