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IN THE INTERPRETATION OF R. PARK «THE MARGINAL PERSON»: EXPERIENCE OF THE MODERN VIEW OF THE CONCEPT

Relevance of the Problem. *The main thesis lies in the notion that according to Park's concept, the marginal individual can stimulate innovative processes in society. The aim of the article is to analyze the «marginal person» in R. Park's concept, which is a natural product of such manifestations of modern society as mobility, rationality, and a high degree of freedom, as well as to identify the phenomenon of cultural marginality in connection with racial and ethnic relations. Research Methods.* *Dialectical principles of objectivity and investigation serve as the methodological basis, allowing to demonstrate the dependence of marginality emergence on the specificity of the context – historical, social, ethnocultural. Scientific novelty* lies in revealing how Park's works explore social mobility and the phenomenon of marginality, carried out in the spirit of the aforementioned orientations: conceptualization, response to processes of social change, attention to specific facts, and pressing issues of one's country. **Results and Conclusions.** *The radical transformation of personality towards overcoming superstitions and prejudices towards individuals from other social groups is possible only under the influence of close and specific contacts. The new embodiment of the «melting pot» is the marginal personality. It can serve as a connecting link between different racial and ethnic groups and contribute to mutual understanding among them. Being bilingual, the marginal personality is capable of assimilating the values of two different cultures and transferring cultural patterns from one group to another, thus playing a positive role in reducing social distance between indigenous populations and immigrants. Their personality irreversibly transforms under the influence of various cultural patterns, thus being able to play a leading role in assimilation processes. With their internal freedom and breadth of worldview, the marginal personality can become an active participant in positive transformations in society and culture. Through careful reading of Park's works, material can be found that describes the adaptation of incoming peoples to new social conditions, reminiscent of the situation of individuals from social niches in society.*

Key words: *marginality, marginal person, social space, social distance, migration, adaptation, assimilation.*

Introduction. The name of R. E. Park (1864-1944) symbolizes the process of the formation of sociology in the United States and the establishment of the Chicago School of Sociology – one of the leading academic institutions in sociology of the 20th century. E. Tiryakian refers to the Chicago School as one of the three «successful schools in the development of sociology». Dating the emergence of «new sociology» to 1890 (the year of academic institutionalization of sociology), E. Tiryakian speaks of the Durkheim school, the Chicago School, and the Parsons school as dominant. Park's role in the development of ideas within the Chicago School of Sociology is difficult to overestimate. Using Durkheim's terminology, Tiryakian characterizes the Chicago Department of Sociology as a «community» distinguished by «organic solidarity» under Park's leadership [3, p. 224-226]. Park stimulated numerous areas of social research, and he had the ability to elevate any student to seemingly unattainable heights.

The aim of the article is to analyze the «marginal person» in R. Park's concept, which is a natural product of contemporary societal manifestations such as mobility, rationality, and a high degree of freedom, as well as to identify the phenomenon of cultural marginality in connection with racial and ethnic relations.

The purpose of the study. The main thesis is that according to Park's concept, the marginal person can stimulate innovative processes in society. Despite the commonly accepted identification of the methodological orientation of the Chicago School of Sociology with empirical orientation, some researchers note that Park saw his contribution to social science in the development of a system of concepts that allow for the classification and analysis of acquired data. The scholar stated: «The problem I was interested in was always more theoretical than practical» [2, p. 274]. According to E. Hughes, «Park did not want to form a system, but he was first and foremost a systematic sociologist» [1, p. 357]. As for the empirical orientation of research by Chicago scholars, it manifested primarily in the rejection of abstract evolutionary and individual-psychological schemes in explaining societal and individual life. As noted by R. Turner, this approach focused on phenomena that were concrete enough and required reliable methods of study [4, p. XVII]. Working with facts rather than assumptions is one of the principles of Park's and his followers' scientific creativity. Two leading sociologists at the University of Chicago – W. Thomas and R. Park – aimed to create a theory with a conceptual apparatus that could be directly used in empirical research (the idea of «middle-range theory» as formulated by R. Merton would emerge in American sociology much later).

Another characteristic feature of the activities of Chicago sociologists was the dominance of a focus on studying social processes rather than social structures in their research. Such orientation was typical of the American, rather than European, tradition. Social changes received not only institutional but also personal dimensions in the works of Chicago scholars: thousands of biographies, diaries, and letters were analyzed by them to study the modification of attitudes and behaviors of individuals in a changing world. In his work «American Practices», E. D. Rucker noted that Chicago scholars focused on social action and human activity. He wrote: «The University of Chicago provided an atmosphere of energy and rupture with the past, which corresponded to American thinking traditions, different from European heritage» [8, p. 36].

A lively response to the dynamics of contemporary American society, attention to urbanization issues, adaptation of numerous immigrants, and social control in turbulent social conditions translated into active social work and unprecedented social reform. Chicago became the most sociologically studied city, with its development and organization of life being carried out based on the research of University of Chicago scholars.

Research methods. The methodological foundation is based on dialectical principles of objectivity and investigation, which allow for demonstrating the dependence of the emergence of marginality on the specificity of the context – historical, social, and ethnocultural.

Dialectical principles of objectivity entail approaching the study of marginality with a commitment to impartiality and accuracy, aiming to understand the phenomenon as it exists in reality, without bias or subjective interpretation. This involves recognizing the multifaceted nature of marginality and avoiding reductionist or oversimplified explanations

Furthermore, the principle of investigation involves systematic and rigorous examination of various factors contributing to the emergence of marginality. Researchers must delve into historical, social, and ethnocultural contexts to uncover the complex interplay of forces shaping individuals' experiences of marginalization. This entails considering historical legacies, societal structures, cultural norms, and power dynamics that influence the positioning of individuals and groups on the margins of society.

By applying dialectical principles of objectivity and investigation, researchers can provide a comprehensive analysis of marginality, revealing its interconnectedness with broader societal processes and contextual factors. This approach facilitates a deeper understanding of the complexities of marginalization and informs more effective strategies for addressing social inequalities and injustices

Scientific novelty lies in revealing how Park's works explore social mobility and the phenomenon of marginality, carried out in the spirit of the aforementioned orientations: conceptualization, response to processes of social change, attention to specific facts, and pressing issues of one's country.

Results and discussion. Park's study of social mobility and the phenomenon of marginality is conducted in line with the aforementioned orientations: conceptualization, response to processes of

social change, attention to specific facts, and pressing issues of one's country. Anticipating the idea of forming a global society, Park noted that the social science of his time used the concept of society to describe «that worldwide network of social relations within which in our modern world all nations and all institutions are evidently interrelated and are increasingly being drawn together» [5, p. 14]. Referring to Graham Wallas, Park applies the term «Great Society» introduced by this author to the contemporary social system, showing its fundamental difference from social systems of the past.

The Great Society has several distinctive characteristics. It has a size that constantly expands with the development of trade and industry. It gives rise to a civilization that «embraces the whole world». Inheriting the cultural traditions of ancient civilizations, it forms the cultural resources of this new, truly cosmopolitan society, including numerous racial minorities and local cultures.

The new emerging civilization has reached a convergence of its borders with the geographical boundaries of the human environment. According to Park, «further expansion of the Great Society will be in the direction of greater complexity rather than territorial expansion» [5, p. 15].

Complexity is another characteristic feature of the new civilization. Park associates it with the «extraordinary variety and interdependence in modern industry». Speaking of the interconnectedness of all parts of the world community, Park writes about a situation where «the price of raw rubber in the London market comes to have a profound effect on the lives of natives in Central Africa and in the headwaters of the Amazon» [5, p. 16].

Another striking feature of modern society is the speed of development. Although civilization, according to Park, most likely emerged from the development of settled peoples, Park, citing Karl Bücher, notes that each new progress in culture usually begins with a new period of migration. Mobility, often associated precisely with migration, has always been considered an indicator (or even a cause) of social change. Migration is not synonymous with mobility. In the modern world, migration, according to Park, has almost ceased (except for refugee migration), but the mobility of the world's population has reached incredible proportions. Mobility is multidimensional: at different times it has been identified with migration and change of residence (Park distinguishes these concepts), and with changes in profession and status in the social hierarchy.

Any improvement in communication (primarily the development of transportation) has contributed to increased mobility in the world, as it provided for crossing vast distances in short periods of time. Park vividly describes the contemporary society in his precise figurative language. The scholar writes that «... the airplane has almost annihilated distances which once separated nations and peoples, and the radio has turned the world into one vast whispering gallery» [5, p. 18]. If we add modern Internet to these examples, the picture becomes even more impressive. Any achievements in the field of communication increase the speed of social change. Mobility in the modern world is developing at a much faster pace than in other periods of history.

The high speed of transformation of modern society is associated, in addition to communication development (in the sense of this term), with the emergence of financial economy. As an American scholar writes, «nothing has contributed so much to the mobilization and secularization of modern society as the all-pervasive use of money as a measure of value and a means of exchange» [5, p. 17]. This perspective on describing modern society was the result of Park's acquaintance with the work of Georg Simmel, whose exceptional lectures became the only systematic course on sociology that Park attended. In his widely known work «The Philosophy of Money» [1, p. 354], the German thinker writes that the emergence of money contributed to the development of pragmatism and rationality in the social world. The latter led to depersonalization of human contacts and the appearance of cynicism in human relations (everything is for sale), contributed to the relativization of all human existence. It was Simmel who first showed that the money economy promotes the prevalence of intellectualism over feelings and determines the «refined essence of the new time». Following the views of his teacher, Park notes that in the Great Society there has been a widespread replacement of personal and moral ties with impersonal and rational connections among its members. These reflections of the American scholar can be compared with Max Weber's teachings on rationality, for whom social progress was primarily manifested in the growing rationalization of social life.

The fourth characteristic of modern society, according to Park, is mechanization as a consequence of the development of human reason. The machine is one of the manifestations of rationality. This was accompanied by technological development, which reached its peak in cities, «where it completely transformed the human environment» [5, p. 19]. Before our eyes, the idea of the American scientist is fulfilled by new realities. In the arguments presented by Park, one can again feel the influence of Simmel, although the views of the American sociologist differ in greater neutrality in the interpretation of the contemporary intellectual and technical achievements of humanity.

Rational science and technology have penetrated all spheres of society. As Park writes, they have led to the replacement of understanding methods in politics, education, and business with methods of manipulation. This idea by Park is very interesting and requires further development. Every aspect of modern society is becoming mechanized and rationalized, inevitably leading, as mentioned above, to the widespread displacement of close and personal relationships by impersonal and formal relationships. This especially occurs in cities.

The fifth characteristic of modern society is freedom. It has numerous dimensions: freedom of movement, which takes on gigantic proportions, freedom to compete for occupations in the society's economy, place and status in the social hierarchy, freedom of self-expression, freedom from moral prohibitions, and so on.

The enumerated characteristics of modern society find their personal embodiment in the marginal person. The concept of «marginality» was introduced by Park in 1928 and became a refinement of Simmel's concept of «stranger». In the famous sociology textbook written by Park and his closest associate E. Burgess, Simmel's text describing the sociological content of the term «stranger» is cited. The social type of the «stranger» is distinguished by characteristics such as mobility, objectivity, confidence, freedom from conventions, and detachment.

Park examines the problems of the marginal person in the context of an extremely intense cultural conflict. Certain groups of people (American mulattos, European Jews, Asian half-breeds, Chinese traders of South Asia) have emerged in society deeply involved in two distinct societies, in neither of which they can be fully integrated. These groups are a significant problem for both society and themselves. The marginal person is doomed to live in two societies and two cultures, which are antagonistic. Living in two worlds, they are cosmopolitan and alien in each. Nevertheless, in relation to their primary environment, they become individuals with a broader outlook.

The Chicagoan scholar, with his vividly expressed reformist fervor, could not help but be concerned about the issues of regulating the relations between migrants (cultural marginals) and the local population. In his article «Beyond Our Masks», using the example of immigrants from China and Japan who settled in America, Park impartially analyzes the reasons for the emergence of social distance between them and the local population. According to the scholar, this is more of a communication problem than inherent fundamental differences between representatives of different races and cultures. As indigenous peoples get to know each other, «behavior that shocked us with its unfamiliarity becomes familiar and understandable». People who seemed impenetrable «become expressive and humane». Personal relationships and friendly preferences are «great moral solvents». These expressions found their conceptual expression in Park's teachings on social distance and racial consciousness, as will be discussed further.

The marginal type of personality, which is formed in the modern urban environment, gradually becomes dominant. Its principles are at the foundation of modern rational civilization. Having a broader horizon, a more subtle intellect, greater independence, rationality, and civilization, the marginal person simultaneously embodies a number of unattractive traits: the possibility of turning rationality into cynicism, freedom from superstitions and stereotypes into a complete loss of moral compass. Thus, the contrast between Chinese born in America and their parents is very striking. «The sons born here are most often familiar and familiar» [7, p. 216]. Park also emphasized that the inner freedom of the marginal person often turns into loneliness. Ultimately, the marginal person demands the establishment of new, previously unknown forms of social control over their behavior, the effectiveness of which is difficult to guarantee.

Park noted that «large cities, where people were united more by symbiotic than social ties, have not yet developed traditions or moral solidarity sufficient to guarantee the reproduction of existing social institutions» [7, p. 356]. However, in reflections on the absence of new, timely forms of social control, the scholar finds signs in society of the development of «friendliness and interest in each other among different nations». «Unbiased examination of the facts should at least restrain passions and clarify the situation from some of the bitterness trapped in it» [7, p. 367].

The problems of marginality were considered by Park in their close connection with the scholar's reflections on the social distances between different social groups. The concept of social distance was borrowed by Park from Simmel. As L. Coser writes, it was of great importance for understanding modern racial relations. Being an unbiased scholar, Park believed that a true researcher should not curse some and pray for others. He studied the social distance between representatives of different social groups as a natural phenomenon of societal life. Park viewed this phenomenon as something that should not be studied from the perspective of moralizing and evaluative judgments.

Park defined social distance as the degree of closeness between groups and individuals. «The degree of closeness measures the influence each has on the other» [6, p. 257]. Social distance is directly related to concepts such as racial consciousness and class consciousness. They describe the worldview in which «we perceive the distances that separate us from classes and races we little understand» [6, p. 257]. According to Park, the confrontation between representatives of different social groups can be softened by each group and each individual being aware of their place in the social structure and their own distance. The scholar writes: «Clearly, anyone can get along with anyone else if both keep a proper distance» [6, p. 258].

At the same time, Park analyzes the presence of prejudices and superstitions in racial and class consciousness. He considered superstition as «more or less instinctive and spontaneous disposition to maintain distance» [Park, 1950, p. 259]. The American sociologist made a very bold statement: superstitions are absent only in individuals without convictions and character. Friendliness and hostility are correlated concepts. Moreover, superstition and social distance are inherent aspects of human association [6, p. 230]. Racial superstition can be regarded as a «status phenomenon». Park writes: «Every individual we encounter inevitably finds a place in our consciousness in a certain existing category» [6, p. 232]. Each personality is defined and evaluated according to the status attributed to it in the established order of things.

Park's teachings on social distance were picked up by E. Bogardus, who created the well-known «social distance scale». Although the measurement results did not reflect the objective social status of ethnic groups, they helped in studying national stereotypes and human superstitions. The scale items included questions about establishing kinship through marriage, membership in the same club, common employment in a profession, common citizenship in a country, etc.

Racial conflicts show that when the traditional order weakens, customary accommodation is no longer effective, and social distance cannot be maintained. Racial conflicts are harbingers of changes in racial status order. They lay the groundwork for new accommodation.

In 1928, Park wrote: «In America, perhaps there are fewer racial superstitions than elsewhere, but there is more racial conflict and more antagonism» [6, p. 233]. This situation is associated with the presence in American society of greater change and progress. Thus, with his characteristic breadth and objectivity, Park considers the presence of racial conflicts and racial superstitions as a consequence of turbulent changes that require comprehensive study and the development of new forms of social control to establish a stable social order.

From Park's perspective, the cycle of racial relations from accommodation to conflict and new accommodation, and perhaps assimilation, is a separate case of the general process of social change.

In his early works, Park linked racial and ethnic superstitions with the fear of economic competition. The fear of losing economic status turns into hatred for members of other (more active or hardworking) racial and ethnic groups. This superstition is not dispelled by understanding the situation and familiarity. In later research, in light of the above idea of social distance (the inter-

pretation of which excluded unhealthy feelings and antagonism, but simply meant a degree of closeness), Park identified unreliability (unpredictability) in relations with strangers as the main cause of superstition. Predictability was recognized by him as an essential condition for human interaction. Gradually, Park began to interpret superstition as a phase in intergroup processes, and social distance as a communication problem. Thus, the American scholar's view progressed from equating superstition with a direct response to economic competition to describing a more complex disposition, which can persist as an ideology and be preserved through social structure [4, p. XX-VII]. «Superstitions are generally not an aggressive but a conservative force; they are a kind of spontaneous conservation aimed at preserving the social order and the social distances at which this order is maintained» [6, p. 238].

As the American scholar notes, racial and class consciousness «often complicates and weakens personal relationships that could otherwise become the closest and involve complete understanding» [6, p. 239]. When people's relationships are built more on a personal rather than group basis, superstitions are undermined.

Conclusions. Thus, the radical transformation of the personality in the direction of overcoming superstitions and prejudices against a person from another social group is possible only under the influence of close and specific contacts.

Social distance is a barrier to communication (along with differences in language and traditions). The problem of racial prejudice has always been very acute in front of American society. It became even more acute because of the «aliens» from China and Japan. Park gives examples of the difference in etiquette and worldview of people of Eastern and Western cultures and emphasizes that the «more striking the racial differences, the more intense the racial self-consciousness and the greater the social distance that separates the new peoples from the natives» [4, p. XXXVI]. However, when we carefully study the characteristics of each people and penetrate «into the motives behind customs and behavior that seemed to us at first strange, foreign and repulsive», we inevitably find that similar motives could be the driving force for us under similar circumstances.

The new incarnation of the «melting pot» is the marginal individual. It is she who can become a connecting link between different racial and ethnic groups and promote mutual understanding between them. Being bilingual, a marginal individual is capable of assimilating the values of two different cultures and transferring cultural patterns from one group to another, and therefore can play a positive role in reducing the social distance between natives and immigrants. Her personality is irreversibly transformed under the influence of different cultural patterns, and therefore she is able to play a leading role in the assimilation processes. A marginal individual with his inner freedom and breadth of outlook can become a living participant in positive transformations in society and culture.

However, if you carefully read Park's works, you can find material that describes such a way of adaptation of the new peoples to new social conditions, which resembles the position in society of individuals from social niches. Thus, Park notes that, under certain conditions, «people of different races can live side by side in symbiotic relationships, each playing its own role in the common economy, but not interbreeding to any significant extent; at the same time, each group more or less completely preserves its own society» [5, p. 21].

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«МАРГІНАЛЬНА ЛЮДИНА» У ТРАКТУВАННІ Р. ПАРКА: ДОСВІД СУЧАСНОГО ПРОЧИТАННЯ КОНЦЕПЦІЇ

Актуальність проблеми. Головна теза полягає в тому, що згідно з концепцією Парка, маргінальна людина може стимулювати інноваційні процеси у суспільстві. **Метою** статті є аналіз «маргінальної людини» у концепції Р. Парка, що є природним продуктом таких проявів сучасного суспільства як мобільність, раціональність та висока ступінь свободи, а також виявлення феномену культурної маргінальності у зв'язку з расовими та етнічними відносинами. **Методи дослідження.** Як методологічна основа виступають діалектичні принципи об'єктивності, дослідження, які дозволяють показати залежність виникнення маргінальності від специфіки контексту – історичного, соціального, етнокультурного. **Наукова новизна** полягає у виявленні того, як у творах Парка відбувається вивчення соціальної мобільності і феномена маргінальності, виконано в дусі вищезазначених орієнтацій: концептуальності, відгуку на процеси соціальної зміни, уваги до конкретних фактів та животрепетних проблем своєї країни. **Результати та висновки.** Таким чином, радикальна трансформація особистості у бік подолання забобонів та упереджень щодо людини з іншої соціальної групи, можлива лише під впливом близьких та конкретних контактів. Новим втіленням «плавильного котла» є маргінальна особистість. Саме вона може стати сполучною ланкою між різними расовими та етнічними групами та сприяти взаєморозумінню між ними. Будучи двомовною, маргінальна особистість здатна до засвоєння цінностей двох різних культур і перенесення культурних патернів від однієї групи до іншої, а

тому може зіграти позитивну роль у зменшенні соціальної дистанції між представниками корінного населення та іммігрантами. Її особистість незворотно трансформується під впливом різних культурних патернів, а тому вона здатна грати лідируючу роль у процесах асиміляції. Маргінальна особистість з її внутрішньою свободою та широтою світогляду може стати живим учасником позитивних перетворень у суспільстві та культурі. При уважному прочитанні робіт Парка можна виявити матеріал, який описує такий спосіб адаптації прийшлих народів до нових соціальних умов, що нагадує становище у суспільстві індивідів із соціальних ніш.

Ключові слова: маргінальність, маргінальна людина, соціальний простір, соціальна дистанція, міграція, адаптація, асиміляція.