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THE PRODUCTION OF SPACE: A BALKAN PERSPECTIVE*

Abstract: The article describes the approach to and condenses some of the main arguments presented in the author's book *Beyond Balkanism: The Scholarly Politics of Region Making*. It charts the main phases in the scholarly conceptualization of the Balkans and its characteristics and, against this background, tackles the question: What can we learn from the Balkan case about the actual production of regions?

Keywords: the Balkans, historical region, symbolic geography, regionalization, 'balkanism'.

1. Introduction

As a paradigmatic historical region, the Balkans has of late been exerting a pull for not only its students, but increasingly for humanities scholars and social scientists trying to make sense of their spatial units of analysis. The response to this seduction can be, and has been, rightly read as an undisguised riposte to the 'balkanist' take on the notion of the Balkans, in that it juxtaposes 'western Balkanism' with understandings of the Balkans that have emerged from within the region, and especially from academically embedded discursive practices and political usages.¹ The insistence on the importance of scientific knowledge in the construction of the Balkans springs not simply from its omission in discussions of the western balkanist discourse. We can, of course, easily recognize that—in comparison to media, travelogues, and fiction, which are the main production sites of public 'balkanism'—scholarship plays a lesser role as a channel of disseminating images. We might also concede that scholarly discourse obeys rules that restrict overt political or ideological implication. And yet, it is that discourse which performs the critical function of providing the resources for legitimization and 'empowering' political discourses. After all, knowledge as power is taken to be a natural consequence of the inability of the Orient, or the Balkans, to create its own self-representation.

Ideally, then, one should consider in parallel and interaction both extra-regional and

* By editorial invitation, this article was derived and adapted from the author's book *Beyond Balkanism. The Scholarly Politics of Region Making*, Abingdon: Routledge, 2018.

¹ On the 'western Balkanism' see, most prominently, Todorova 1997 (2nd ed. 2009).

intra-regional expert conceptualizations of the Balkans. This I had tried to do in a recently published book.² For the sake of this paper, I shall only briefly sketch some aspects of the external expert or academic engagement with the region and, in the course of the subsequent exposé, detect certain connections or disjunctions with the local conceptualizations.

2. Incipient external drives towards regionalization

Scholarly interest in the Balkans as a distinct geographical and cultural area, and even its perception and naming as a single region, does not predate the early nineteenth century. The geographical notions of the ‘Balkan peninsula’, ‘the Balkans’, and ‘Southeastern Europe’ were late coinages of non-local origin, whereas the dominant appellation until almost the end of the nineteenth century was a political one—‘Turkey in Europe’ or ‘European Turkey’—associated not so much with a fixed territory as with the geopolitical implications of the so-called Eastern question.

The institutionalization of the study of the Balkans came about in the late nineteenth and early twentieth centuries along with the ultimate disintegration of the Ottoman Empire. Up until World War II, the tendency to treat the Balkan or Southeastern European states en bloc had, as a rule, political and economic incentives. Discrete foreign academes, however, participated with varying weight and proficiency in the regional conceptualizations. On the whole, while proximity and imperial expansion ensured the almost uninterrupted German political and economic involvement in the area, German-language scholarship—Austrian and German—contributed most to the extensive and painstaking study of the area and the stabilizing of the Balkans or Southeastern Europe as a historical region. For the better part of the pre–World War II period, the British interest in the area was aligned with the framework of the ‘Near East’, which put the whole Balkan *problématique* in a specific light. The French academic approach to *les Balkans* was shaped mainly by fears of the ‘pan-German’ economic and political thrust in the area. This explains the French preoccupation with the South Slavs, who were portrayed as the moral, political, and racial opposite—and the strategic counterforce—to the Germans. For Russia, on the other hand, studying the Balkan religious and ethnic brethren—*edinovertsy i edinoplemenniki*—meant not only extending Russian influence in the region but also bolstering Russia’s historical consciousness, Slavic identity, and imperial status.

That being said, the relationship between imperialism (or strategic interest) and academic engagement was not necessarily a straightforward one. While the larger German, British, French, and (later) American geopolitical stakes determined to a great extent the scale of academic investment, Italian imperialist pursuits in the region in the interwar period failed to engender academic interest, while Russian imperial cartography operated with various configurations: the Slavic world, the Balkans, or a satellite Eastern Europe.

3. Regionalizing the Balkans from within

Within the region, we can analytically distinguish four periods of academic regionalization:

² Mishkova 2018; see also the book symposium in Franzinetti *et al.* 2020.

1. It is quite significant that the first regional self-representations emerged as parallel identity projects amidst the dynamic phase of European nation-state building. The period of the ultimate dismantling of ‘Turkey in Europe’ at the beginning of the twentieth century, marked as it was by radicalization of national discourses, also saw the inception of an encompassing Balkan and Southeastern European entity. Nation-state building and the construction of an overarching regional unity at that time went hand in hand and were compatible.

Different disciplines participated with varying weight in creating Balkan regionality and in defining its attributes. In the origin of the Balkans as a unitary notion, the then vanguard comparative linguistics played a key role. Today, the ‘Balkan linguistic area’ or ‘linguistic league’ is considered as ‘the first area of contact-induced language change to be identified as such’ and the model prototype for language interaction and convergence. Linguists were the first to use the term ‘balkanism’ to indicate, contrary to the present-day resignification of the term, the opposite of fragmentation: a lexical and, more importantly, grammatical feature shared among the unrelated or only distantly related languages of the Balkans—Slavic, Romance, Albanian, Greek, and Turkish. Such morphological similarities among the Balkan languages, which were first observed by the Habsburg philologists Jernej Kopitar and Franz Miklosich, came to be increasingly interpreted as testimony to ‘centuries of multilingualism and interethnic contact at the most intimate levels’.³ ‘The commonality of grammatical features and developments among Balkan languages’, Raymond Detrez argues, ‘can be taken as a reasonable indication of the presence of social and cultural modes of convergence... An intensive process of mutual exchange of material and spiritual goods, characterized by ‘contamination’, ‘hybridization’ or—to use a less connotative term—‘osmosis’ must have taken place along channels paralleling those of linguistic contact’.⁴

At the time, the linguistic approach to the Balkans stirred other academic fields to turn their attention to phenomena like contact, interaction, and convergence. According to Nicolae Iorga, Romania’s foremost historian before World War II, regional history revealed a number of similarities strikingly reminiscent of the Balkan linguistic union. Iorga postulated the existence of a ‘fundamental unity resting on archaic traditions’, a particular culture and heritage common to the whole European southeast. He claimed that this unity was drawing upon the great Thraco-Illyrian-Roman tradition, had been epitomized by Byzantium and later the Ottoman Empire, and was enshrined in a wide range of common institutions.⁵ On their part, literary scholars like the Bulgarians Ivan Shishmanov and Boyan Penev or the Romanian Ioan Bogdan charted massive ethnographic, folkloric, and literary borrowings that undermined the romantic notion of national uniqueness and shaped a space of cultural osmosis ensuing from long-standing coexistence and interaction.

The commonalities on the level of grammar, syntax, belief, and popular lore, in turn, seemed to imply an underlying primeval unity in the way of thinking, mentality, and the unconscious. This trend was contemporaneous with the upsurge of psychological discourses and disciplines of comparative folk psychology and national characterology across Europe at the beginning of the twentieth century. One of the outcomes of such studies was the notion

³ Lindstedt 2000: 231–246; Friedman 1994–1995: 89.

⁴ Detrez 2013: 16.

⁵ Iorga 1929; 1940.

of a 'Balkan mentality'. Its diffusion, however, was not due—as is commonly claimed—to dubious academic fashions external to the region that tended to portray the Balkan cultures as a sanctuary of patriarchal practices and lifestyles long extinct elsewhere in Europe. In fact, it was the Serbian anthropogeographer Jovan Cvijić, who for the first time implemented this 'scientific/psychological' approach to the Balkans—by the way, to be later taken aboard by Fernand Braudel—elaborating on the link between the mental constitution of populations and geographic factors.⁶

2. The interwar period saw the rise of new paradigms promoting ontological and cultural-morphological models for explaining spatial similarities and differences. They were less concerned with interaction and diffusion between nations, which were so characteristic of the previous period, than with devising some common cradle and shared structures for these societies. That was the aim of the 'new science of balkanology', driven by several Yugoslav and Romanian scholars. 'The time has come', wrote the editors of the Belgrade-based new journal *Revue internationale des études balkaniques*, to contemplate the coordinating of national academic Balkan studies, giving them cohesion and, above all, orienting them towards the study of a Balkan organism that constituted one whole since the most distant times⁷ and elucidating 'the elements of Balkan interdependence and unity'.

It is in this sense significant that, at a time when the national historiographies were busy eliminating the Ottoman features from the national cultures, scholars of the Balkans endeavored to reverse the notion of the region as the Ottoman legacy in Europe. They did so not by asserting an inherent difference from the Ottomans, but by praising the Ottoman 'primitiveness' and the segregation of the Christians under Ottoman rule, which they saw as prerequisites for the preservation and development of the unique Balkan virtues and potential. The implication of this kind of argument was that—had the Turks been more advanced, that is, more like the West—the culture and identity of the Balkan Christians would not have survived.

This reading differed substantially from the contemporary western view, which continued to describe the Ottoman rule as an aberration and unmitigated disaster—a black 'yoke' that was held responsible for all the ills that plagued the development of the Balkan states. In this regard, the western scholars of the Balkans found themselves in the same camp with the Balkan nationalists, not the Balkan regionalists.

Even more remarkably, Balkan regional scholars considered the (western idea of) nationhood as a misplaced importation that brought about the disruption of an organic society. 'The principle of nationality, and later the right to self-determination', Romanian medievalist and founder of the 'Institute for Balkan Research' in Bucharest Victor Papacostea wrote, 'has not found in our area the right time and the right solution. Created in the West and for the West, the idea of national states was borrowed by or enforced on the Balkans ...; no attempt was made to adapt this idea to the conditions of our region It is hard to find another example in world history that reveals more clearly the catastrophic consequences of the blind application of an idea in disregard for the major natural realities'. Against the tendency of framing the Balkans in terms of nationalist discord, Balkan regionalists stressed

⁶ Cvijić 1918; Braudel 1995: 776–780.

⁷ Budimir and Skok 1934: 2–3.

the ‘unnaturalness’ of nationalism and the difficulties it encountered in the region.⁸ Such a view, predictably, was unpopular outside the region. Arnold Toynbee was one of the very few western scholars who shared the view that the application of the utterly exceptional western formula of making language the basis for political demarcation to the intermixed populations of the Balkans and the whole Near East had resulted in huge human suffering and massacre and, as he put it, ‘diminishing returns in happiness and prosperity’.⁹

From such positions, Balkan regionalists developed the theoretical and methodological parameters of the new science of balkanology. Its domains outline a truly interdisciplinary field of study: from history, linguistics, and folklore to anthropology, demography, statistics, and human geography to economic development, law, the arts, architecture, and literature.¹⁰ It is indeed remarkable that a genuine blueprint for what would come to be called ‘area studies’ after World War II, aimed at ‘total knowledge’ by combining the humanities and social sciences, originated in the 1930s in the region itself.

On the symbolic level, the shift was no less stunning. Precisely at the time when the western discourse of balkanism reached its peak and when the Balkans became increasingly recreated as the ultimate internal European ‘Other’, in the local regional context the term ‘Balkans’ and, being Balkan underwent systematic rehabilitation and veritable thriving as both a political and cultural concept. The movement toward a ‘Balkan Conference’ and ‘Balkan Pact’, the founding of ‘Balkan institutes’ to conduct ‘Balkan research’, and the appeals for a ‘Balkan fatherland’, ‘Balkan consciousness’, and ‘Balkan patriotism’ converged in the slogan ‘the Balkans for the Balkan peoples’. Accordingly, this new political concept was in explicit opposition to Southeastern Europe, which was found to be an artificial and ‘faceless’ coinage.

This forceful rearticulation was aimed not at eluding the western balkanism but at directly confronting and emasculating it. Next to laying the grounds for a new study field, interwar balkanologists sought to resignify the Balkans and turn its Orientalist semantics on its head. They did so through a series of para-historical accounts about a primeval Balkan soul, regenerated Balkan culture, a proper cultural orientation and global mission, and regional self-reliance and self-sufficiency. The Balkans they tried to promote was not just a cultural-historical and socioeconomic entity but an axiological category—one that embodied a peculiar value system underlain by cultural and moral elements.¹¹

All this went beyond coping with stigma and overturning self-stigmatization. Interwar academic balkanism strived to supply the conceptual toolkit and the scholarly basis for the construction of a Balkan identification. While not denying the still persisting power of the nation-state, this balkanism pursued a more encompassing, regionally anchored collective identity. In the process, the Balkans gelled into a discrete civilizational sphere, occasionally underpinned by overt racism and couched in moralizing oratory or metaphysical, even mystic references. Ironically, this representation borrowed heavily from the then fashionable ethno-ontological discourse praising ethnic authenticity, organicity, and autarchy.

In essence, the interwar ‘Balkan idea’ was an emancipatory one. It was an attempt at

⁸ Papacostea 1996.

⁹ Toynbee 1922: 16–18.

¹⁰ Budimir and Skok 1934: 14–19.

¹¹ See, in particular, Skok and Budimir 1936: 601–613; *Balkan i Balkanci* 1937.

offsetting the impotence of small statehood in the geopolitical environment of the 1930s. ‘To protect the Balkans as one entity, to preserve it for the Balkan peoples themselves’, wrote one of the founders of the *Balkanski institut* in Belgrade, ‘this today is the only true and the greatest national idea. Our patriotism, if it wants to be real, should be a Balkan patriotism’.¹² Furthermore, the Balkan idea, as conceived at that time, removed the compulsion to choose and define the identity of the Balkans between the poles of Europe and Asia. It asserted the existence of a ‘strong and irreducible Balkan individuality’, which valorized in-betweenness, liminality, and complexity. It sought to subvert the western notion of progress, where different communities trod towards the pinnacle of history occupied by ‘the West’. It professed a proper, Balkan time axis, leading from the deepest past to the present and future, where universal ancient virtues—the bedrock of European civilization—were continuously re-enacted. Accordingly, ‘The Balkan Other [was] re-imagined as the West’s anthropological Utopia, as the Westerner’s alternative, or possible self’; he (or she) appeared as ‘considerably more gifted, more admirable, and even more appealing than the average, banal Westerner’.¹³

It is worth noting that such self-representation tallied with a conspicuous strain in Central European and western literature at that time that estheticized Balkan underdevelopment, spontaneity, and artlessness. Arguably, this convergence of perspectives was the outcome not of imitation, but of a flow of ideas and concepts between east and west. Thinkers as different in other respects as the German Slavist Gerhard Gesemann, British historian Robert William Seton-Watson, and Spanish philosopher José Ortega y Gasset, saw in the ‘pristine Balkans’ a way of exploring the contemporary challenges to the self-assurance of ‘the West’ and of expressing the widely shared feeling of estrangement from modern life.¹⁴ From this perspective, engagement with the Balkans, both inside and outside the region, was a way of engaging with wider domestic and transnational debates about the fate of western modernity and progress.

3. After World War II, the Balkans as a politically or economically relevant notion all but disappeared. It survived as a cultural-historical space plowed by a cluster of historically oriented human sciences and as a terrain for exercising the soft power of cultural diplomacy. The proliferation of regionalist organizations and the consolidation of Balkan studies as an autonomous field in the 1960s brought together cultural politics, geopolitics, and national propaganda and marked a new wave of politicization of Balkan research.

The major themes organizing the balkanist academic discourse during those years were ethnogenesis and ethnocultural continuity, the impact of empires, the sources of backwardness and modernization, and relations with ‘Europe’. These themes were approached from strongly normativist positions, marked by evolutionism, Eurocentrism, and teleological thinking. Unlike their predecessors, the postwar balkanists showed no enthusiasm for devising a ‘Balkan’ road to modernity. The neo-Marxist ‘dependency’, ‘world-economy’, and ‘core-periphery’ paradigms did not produce visible resonance in the region in contrast to other parts of eastern Europe. The same applied to contemporary nationalism studies. The dominant approach to modernization favored comparisons of the local ‘stages of development’ with those in the west rather than with neighbors or other peripheries.

¹² Parežanin and Spanačević 1936: 321; *Knjiga o Balkanu*, vol. 1, vii–ix.

¹³ Antohi 2002.

¹⁴ Gesemann 1943; Seton-Watson 1917; Radica 1940: 221.

As a general rule, regional scholars tended to stress particular aspects of the 'common Balkanness' where 'their' nation could claim a special contribution. The periods that, in theory, featured as crucial for Balkan historical unity were partitioned in similar national chunks. It was common to offer selective Greek, Bulgarian, or Serbian perspectives to the Byzantine Empire or to parcel the study of the Ottoman Empire into 'Greek', 'Bulgarian', or 'Serbian' lands within teleological national narratives. Balkan studies were, in this sense, a virtual playground of 'methodological nationalism'. Not surprisingly, such a 'regional approach' did not affect the writing of national history, which remained a self-contained, didactic, and parochial field.

Remarkably, communication across the Iron Curtain was made possible precisely by the consensually shared national framework of history writing and by neither side subjecting the national paradigm to any critical scrutiny. The US journal *Southeastern Europe* regularly published thematic issues devoted to key national anniversaries featuring the diehards of the Balkan national historiographies. The same was true of the German journal *Südost-Forschungen*. The 'historical Balkans' thus came to be understood as a mosaic of national spaces validated by immutable ethnic or national communities fully conscious of their distinct character. Unlike interwar balkanology, its postwar continuation never went as far as to interrogate the basic theoretical premise of the discipline: the construction of boundaries per se. Overall, Balkan studies remained isolated from the theoretical and methodological debates taking place since the 1970s in general history and the social sciences, especially in political economy and nationalism studies, in both western and eastern Europe.

4. Finally, the post-1989 period has been characterized by a theoretical clash over the meaning of the Balkans. In reaction to the resurrected ghost of 'balkanism' in the wake of the Yugoslav wars of succession, some scholars, coming mainly from literary and cultural studies, sought to argue for the Balkans not as a product of geography, history, or culture but as 'a place' in a discourse-geography'. A great deal of the research after the mid-1990s has centered around the nature of this discourse as well as how it was established, its characteristics, and its critique. But there are also those who have continued the search for the historical or cultural 'reality' of the Balkans, variously defined in terms of a cluster of structural and cultural characteristics or historical legacies. The theoretical discussions the Balkans gave rise to placed the area at the center of the debates on the meaning of regions and the mechanisms for the production of space that has led to interrogating definitions, traits, and boundaries.

4. A quintessential historical region?

So, what can we actually learn from the Balkan case about the production of regions itself?

The entanglement of politics with scholarship appears as a major propeller of region making. The politicization of scholarly regionalisms related to, on the one hand, the great European states' economic and political interests in this area and, on the other, various local nationalist or federalist schemes typically conceived in response to external or domestic political pressure. Balkan regionalist projects were steeped in diametrically opposed value

systems: conservative, national-liberal, Marxist, social constructivist, etc. When we talk about supranational frameworks, we tend to believe that we are referring to politically 'progressive' projects. Many regional schemes, however, spoke on behalf of far more ambiguous political stances. Consequently, the Balkans could be referred to as the root of European civilization or be envisaged as the driver of an alternative, anti-European value system; it could signify a younger Europe that would revitalize the old one or represent a stigmatizing notion denoting deficiency in civilizational terms to be overcome by consistent efforts at Europeanization.

Yet the most enduring source of politicization of scholarly regional terminology is the fusion of regionalist and nationalist designs in the fields of politics, economy, or culture. The academic notion of the Balkans was construed in dialogue with national autarchy and nation-centered scholarly paradigms. The outcome was patently ambivalent: Balkan regionalism could at one time erode and at another reinforce national differences. The drive for methodological rescaling beyond the national often originated from essentially nationalist agendas. There is, indeed, no clear-cut difference; rather, there is a complex relationship between the conceptualizations of the national and the regional: Nationalist arguments may be adduced to buttress a regionalist framework, and a regional definition may serve to bolster a nationalist project.

Local regionalizations sometimes connected to and other times clashed with the regional discourses produced outside the region. To put it bluntly, as powerful as the post-Enlightenment 'Western discourse' (or rather different national western discourses) of the European east and southeast might have been, it was neither the sole nor, at all times, the dominant 'agent' of regionalization. The flow of ideas, concepts, and narratives were never unidirectional. The ideas of scholars like Shishmanov, Cvijić, Iorga, Papacostea, Budimir, and Skok strongly influenced western conceptualizations. Sometimes they went beyond the understanding of the Balkans: Cvijić's influence is clearly attestable in both Fernand Braudel's conceptualization of the Mediterranean and the paradigm of *histoire des mentalités*. Iorga partook in both Karl Lamprecht's project of *Weltgeschichte* and the 'new cultural history' that prepared the ground for the Annales school. Such cases of knowledge transfer bespeak a movement of concepts and ideas that, although being asymmetrical, breaches the rampant view of a mono-dimensional 'West'-to-'East' pattern.

The Balkan case is also revealing in the way various disciplines are contributing to the production and life cycle of regions. Until World War II, linguistics, folklore, literature, and ethnography were much more important than history proper for the crystallization of the Balkans as a historical region. The upsurge of the social sciences and of divisions based on socioeconomic and political models after 1945, subsumed to a large extent Southeastern Europe under an Eastern European umbrella, undermining the Balkan narrative, which re-emerged with the 'cultural turn' in the 1980s.

The recurrent and currently prevailing notion of the Balkans as based on the continuity of its history springs from the assumption that shared historical experiences within this geographical space necessarily produce a structural entity—a historical region—and even something like a regional identity. However, none of the 'regional' historical experiences and legacies was exclusively a Balkan one, as they typically applied to much bigger political configurations; nor did they affect this geographical space as a whole and

in the same degree. A closer look at individual historical periods suggests that most of the so-called defining characteristics of the region were not incomparable with other regions—in Europe and beyond.

Moreover, social, demographic, religious, cultural, economic or political phenomena draw different lines, shape different zones, and render different regional ‘definitions’. Diverging geographies also result from zooming differences—areas charted by criteria on the micro level (like marriage or hereditary patterns, gender relations, household and work organization, etc.) differ from those drawn on a macro level (state building, industrialization, urbanization, etc.).

There is thus no single ‘shared’ history that scholars can reify, that might be thought to produce a specific cluster of characteristics, or that could legitimately serve to construct a region. Instead, all histories encompass ‘multiple geographies’. Conversely, tailoring academic research to established spatial categories tends to predetermine to a large extent its conclusions. The endless debates about the boundaries of the Balkans have been the result of not only differing political agendas or geographical determinism, but also the scholarly fallacy of projecting a spatial category coined at a particular time and for particular purposes backwards and forwards in time, where it sits uneasily with very different political and social realities.

Such challenges to the meaning of ‘regions’ and the legitimacy of ‘area studies’ feed on postcolonial critique, sensibilities attuned to an increasingly globalized world, and new theories related to the social construction of space. They inevitably raise hard questions about the rationale and future of regional research. The tackling of these issues falls beyond the purview of this paper, but some general observations may be broached here.

Regions have not been overcome or made irrelevant by the demise of traditional ‘area studies’ and the rise of the ‘new transnationalism’. However, sustaining their relevance as a terrain of action and an object of study entails reconfiguring their meaning. A vessel-like concept of a historical region marked by objective criteria and a cluster of structural and cultural traits, or even legacies, should recede before a fuzzier, processual, and open-ended one. This means shifting the focus of discussion to the social, political, and intellectual mechanisms effecting the materialization of space and borders and, most prominently, to human agency. In our time, ‘rage to deconstruct has rather given way to a fuller and richer exploration of the capacity, and its limits, of people (and things) to act’.¹⁵ This most surely concerns academics, whose discourses are a powerful social mechanism for constructing space, whereby heuristic frameworks tend to crystallize into cognitive maps and political realities.

¹⁵ Geyer 2006.

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ПРОИЗВОДЊА ПРОСТОРА: БАЛКАНСКА ПЕРСПЕКТИВА

Резиме

У чланку се дају примери и сумирају се неки од главних тврдњи које су разрађене у ауторкиној књизи *Beyond Balkansim. The Scholarly Politics of Region Making*. Овде се означавају главне фазе у академској/научној концептуализацији Балкана и његових особина, а затим се, узимајући претходно у обзир, поставља и разматра питање: шта можемо да научимо и разумемо о самој конструкцији и производњи регија имајући у виду пример Балкана..

Кључне речи: Балкан, историјска регија, симболичка географија, регионализација, „балканизам“.

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