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The role of services of general interest in the promotion of spatial justice

Abstract

The concepts of social and spatial justice attempt to answer the question of how we can manage inequalities in society fairly and equitably while offering equal opportunity for all of its members. How diverse services are delivered to ensure justice in terms of availability, accessibility, price and even quality is a significant aspect of resolving this question. The principles of services of general interest (SGI) are based on a European model of society that strives for equality, social welfare, solidarity and cohesion. These ideas are also crucial for achieving social and spatial justice.

Based on the findings of case studies of the RELOCAL H2020 research project, this study shows that while local challenges related to the provision of SGI (e.g. the improvement of living conditions) can be managed to some extent, development programmes aimed at local SGI can also lead to the reproduction of social and spatial injustices, as well as hierarchical dependencies, due to procedural and distributive deficiencies. The paper argues that the roles and responsibilities of players at various spatial levels, as well as their power relations, are crucial to these processes because they link agreed-upon and intended principles to their actual implementation.

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1. Introduction

One of the main goals of the cohesion policy of the European Union (EU) is the reduction of inequalities in social and economic opportunities between different areas. Inequalities might be interpreted by members of society as signs of injustice. The concept of social justice is largely built on the interrelated notions of fairness, solidarity and cohesion, and expresses the need for equity within society in terms of wealth, opportunities and privileges (Rawls 1971; UN 2006). Social processes and characteristics are always spatial too; thus, spatial features might also contribute to the evolution or development of just and unjust conditions. In this way, spatial justice, by representing the spatial dimension of social justice, is related to the just distribution of resources, opportunities and power relations between social groups and spaces.

An essential question related to social and spatial justice is how members of a given society can access services (of general interest). People living in different territories might face different levels of injustice in terms of availability, physical or temporal accessibility, affordability and quality of services of general interest (SGI) and access thereto. At the same time, the provision of SGI could contribute significantly to the goals of spatial justice by mitigating the effects of these differences. How diverse services could serve as effective instruments in delivering justice is critically dependent on the way they are provided and adapted to local facilities.

This paper aims to assess the role of SGI in delivering spatial justice by reviewing key EU policy documents and academic and grey literature, and by exploring the operational features of services that aim to promote spatial justice and actor groups central to their provision. This task is supported by a review of findings from the case studies of RELOCAL EU Horizon 2020 research, which focus on local (development) actions from the viewpoint of cohesion, territorial development and spatial justice.

2. Theoretical background

2.1. The theory of social and spatial justice

The roots of the concept of justice in social sciences are strongly related to philosophical debates on the morality of social relations. The works of influential thinkers from Plato to Locke, Rousseau and Kant emphasise the role of justice among members of society by theorising moral foundations and standards operating in societies or by advocating the theory of social contract (Madanipour et al. 2017). The idea of social justice stems from the domain of political and moral philosophy and social theory and is essentially based on the Rawlsian theory of justice as fairness. According to Rawls' concept, there is a 'lexical priority' in the order of the principles of liberty, equal opportunities and difference (Rawls 1971):

- The Liberty Principle emphasises the equal rights of individuals to basic liberties.
- Within the Equality Principle,
 - the Fair Equality of Opportunity Principle states that individuals should have the right to opportunities regardless of their background, and
 - the Difference Principle involves regulating inequalities in a way that ensures benefit to the least advantaged.

Through the Equality Principle, the Rawlsian theory of justice establishes the distributive element of justice, which underlines the importance of the equal distribution of goods, services and opportunities (Madanipour et al. 2017). Rawls also raised the issue of how the outcome is connected to the procedure of distribution. In social theory, this established the idea of procedural justice, according to which just institutions and their operational mechanism are needed to achieve a just society (Bell and Davoudi 2016; Madanipour et al. 2017; Young 1990). The opposite is also true: critics of the procedural side of social justice point out that unjust institutions and procedures in society contribute to the reproduction of inequalities. Distributive justice is also often questioned concerning whether a fair distribution alone can lead to more just societies. Amartya Sen (2009) emphasised the importance of what people can do with the resources distributed. His capabilities approach highlighted the question of social choice concerning

the importance of freedom and capabilities in making choices and being responsible therefor (Madanipour et al. 2017).

Spatial justice is not only related to the distribution or the spatial and geographical aspects of social justice. Explanation of and theorising on spatial justice (and criticism of the distributive view) by Harvey (1996, 2009), Lefebvre (1991) and Soja (2009, 2010) – which relate to social movements, activism and political and governance issues in cities (e.g. ‘right to the city’) – place more emphasis on the role of institutional processes in causing unjust geographies. According to Madanipour et al. (2017), spatial justice covers a complex understanding of the distributive and procedural view (whose differences lie within the theorising space). The distributive side of spatial justice can be understood as the just distribution of resources and opportunities between social groups across space (presence of justice in space). The procedural element of spatial justice is related more to power mechanisms causing injustice between various social groups and spaces.

The levels of spatial justice are related to a multi-scalar understanding, according to which spatial justice simultaneously operates at different spatial levels, from the smallest neighbourhoods to the global scale (Soja 2009). This is valid for both the distributional and procedural elements of spatial justice. Positive overall pictures at the national or regional level on the distribution of resources might hide injustice between smaller areas (Madanipour et al. 2017). As a procedural phenomenon, spatial justice at local levels is highly dependent on processes, institutions, regulations, policies, etc. at national, supra-national or global levels. This again underlines the importance of perspectives in dealing with spatial justice at lower territorial scales (e.g. limitations and capabilities of localities or local actors).

The principles of social and spatial justice are significantly reflected in the goals and operation of the EU cohesion policy, especially territorial cohesion. As aims of the cohesion policy, the promotion of harmonious development and reduction in regional inequalities should serve spatial justice as well. This goal is emphasised repeatedly in declarations about cohesion policy in general and about territorial cohesion as well (Faludi 2007). The 3rd Cohesion Report expresses a basic principle of spatial justice by defining the rationale for territorial cohesion thus: ‘...people should not be disadvantaged by wherever they happen to live or work in the Union’ (EC 2004, p. 27).

Further, concerning territorial cohesion policy, modes of development might need to be reconsidered from the viewpoint of spatial justice. The resource redistributive development of disadvantaged areas is not equal to the promotion of spatial justice (Connelly and Bradley 2004). The distribution of resources does not necessarily eliminate the causes of injustice and territorial inequalities between and within regions. It is also important to understand the role of local participation in actions constructing spatial (in)justice – access to or exclusion from actions. As an agenda for a reformed cohesion policy, the Barca Report refers to Sen (1999), who promotes the role of individuals ‘...as active agents of change, rather than passive recipients of dispensed benefits’ (Barca 2009, p. 22). According to the Barca Report, a place-based approach could be regarded as a tool for promoting efficiency in local development and delivering spatial justice by allowing places to use their potential.

2.2. The concept and key principles of services of general interest

SGI are widely acknowledged within the EU, and their role is underlined by several policy documents from the Treaty of Rome in 1957 to the Lisbon Treaty in 2007. According to a European Commission communication in 1996, SGI represent a key element in the European model of society by expressing the commitment to mutual assistance (solidarity), social cohesion and market mechanisms (EC 1996).

At the same time, elements of these principles of operation of services do not necessarily converge but might counteract each other. European integration is based on a market-based operation of the economy with the key feature of free flow of services, which does not promote solidarity and social cohesion, since economic actors are interested in the exploitation and sustenance of socio-economic differences within the Community (Czirfusz 2021).

The definition of SGI by the Commission is rather tautological in stating that it ‘covers both market and non-market services which the public authorities class as being of general interest and subject to specific public service obligations’ (EC 2003, p. 7). However, in the ESPON SeGI project (on indicators and perspectives for SGI in territorial cohesion and development) the method of providing SGI is emphasised. Thus, SGI are

identified by being delivered to inhabitants and businesses through other than 'normal' market channels due to their status as 'necessary services' (ESPON 2013a). Some explanations underline that SGI are related to the special interest of the 'public' in certain services that used to belong to the public domain or still belong there (Muscar Bensayag 2007 cited by Noguera and Ferrandis 2014).

As a key element in the European model of society, the principles related to the provision of SGI are similar to the values represented by the European Social Model. The Green (1993) and White (1994) Papers on European Social Policy by the European Commission introduced a social model based on the shared values of democracy and individual rights, free collective bargaining, the market economy, equality of opportunity for all, social welfare and solidarity (Faludi 2007; Vaughan-Whitehead 2015). This indirectly reflects the role of SGI since these services play an '...important role as a social cement over and above simple practical considerations,' and they have '...symbolic value, reflecting a sense of community that people can identify with' (EC 1996, p. 4). This is an important link for understanding the relationship between SGI and the concept of justice since the European Social Model expresses the interests of the EU in social justice, though not effectively in spatial justice (Madanipour et al. 2017).

Madanipour and others also note, concerning the European Social Model, that it provides soft measures in areas where the EU has no formal competencies (for moderating the EU's economic growth agenda). Such functionality as a secondary, soft law can also be recognised in the operating principles of SGI (Neergard et al. 2013). It also results in SGI having no fixed meaning at the EU level and different national models and variations among welfare regimes (Andreotti, Mingione, Polizzi 2012; Esping-Andersen 1989; Nadin and Stead 2008). These differences can appear as variations in the organisation of SGI in terms of production, financing, level of responsibility and territorial organisation. According to Humer and others, in this sense, there is a basic difference between a Mediterranean (higher public responsibility, important role for familial involvement, weaker territorial organisation) and Continental and Nordic (and UK) model (public responsibility mainly at the local and regional levels and high public involvement in the production and financing of SGI), while the differentiation is not clear-cut in several cases (Humer, Rauhut and Marques Da Costa 2013). These organisational variations also lead to

significant differences in the minimum level of service provision among European countries (ESPON 2013a; Littke and Rauhut 2013). According to Noguera and Ferrandis (2014), the looser Community regulations on SGI indicate the cautious attitude of the European Commission since these are primarily the responsibility of national, regional and local legislation, and the Commission does not intend to trespass on their competencies by offering policy statements on SGI.

The social models, political cultures and values reflected by SGI have special connotations in each European country, and these are related to the historical evolution of their identity construction (Calleja 2015; Noguera and Ferrandis 2014). This latter process determines the principles of operation of a state, and within the EU, it provides a distinctive feature for defining Europe (Calleja 2015). While the foundations of the provision of SGI are based on that identity construction, this also makes it difficult to reach a consensus at the community level on what services should be included in SGI (Noguera and Ferrandis 2014).

Thus, individual EU member states define what is included in and excluded from the definition of SGI, according to the national context. This definition may refer to what is public and what is private in the production and provision of services but can also relate to questions of financing (public, market), as well as rules of competition.

SGI cover a wide array of diverse services. The main categories are services of general economic interest (SGEI) and social services of general interest (SSGI). The importance of SGEI was already mentioned in the Treaty of Rome in 1957. SGEI are 'market services which the Member States subject to specific public service obligations by virtue of a general interest criterion' (EC 1996, p. 3). SGEI usually cover transport (road, rail or air), energy (gas water, electricity) and communication (electronic communication, ICT and postal services) networks. However, waste management, for example, could also be included in this group. Besides these 'classic' types of services, in their broadest meaning, SGEI could cover any activity regulated by the state (EAPN Services Group 2007).

SSGI are also provided in the public interest. Such SGI are essentially 'social' and they are often linked to national social welfare and social protection rights and arrangements (EAPN Services Group 2007). The European Commission differentiates between the so-called statutory and complementary services and other essential services. The first group of

social security schemes is linked to the main risks in life, related to health, ageing, occupational accidents, unemployment, retirement and disability (EC 2006). The group of other essential services plays a preventive and social cohesion role; these services are directly provided to individuals and often targeted at vulnerable social groups (EAPN Services Group 2007). Concerning both types, SSGI can cover different activities related to health care, social security, employment and training services, social housing, childcare, long-term care and social assistance services.

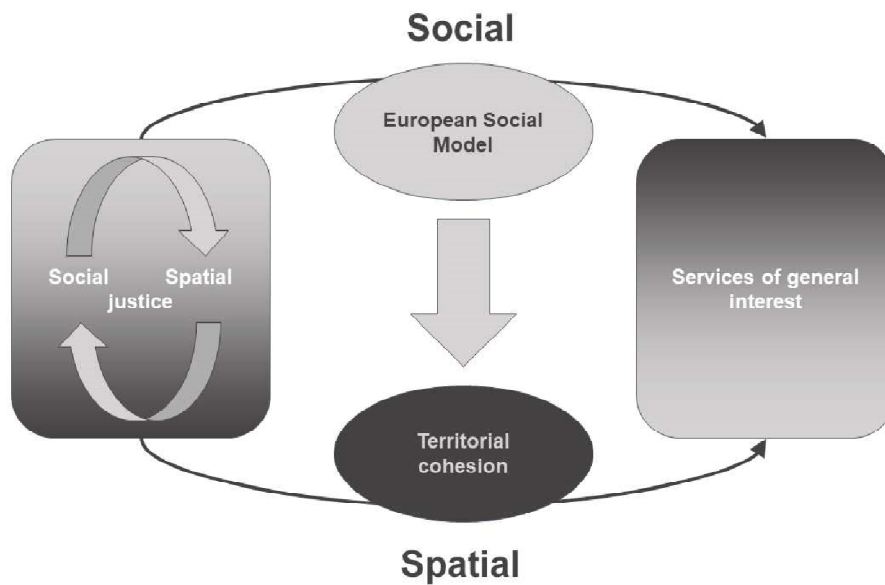
The differentiation between SGEI and SSGI is not crystal clear. On the one hand, the European diversity in the understanding of SGI enables similar services to belong to different domains (SSGI or SGEI) in different EU member states. Moreover, this assignment can change from time to time even in individual countries. On the other hand, the broad definitions of SGEI allow social services to be generally classified as having economic interest if they are paid for (not necessarily by the beneficiary) since they serve economic activities (EAPN Services Group 2007).

2.3. Social and spatial justice and the provision of services of general interest

To understand the role of SGI in the promotion of social and spatial justice, the introduced conceptual framework uses the notions of both the European Social Model and territorial cohesion (Figure I). The European Social Model reflects the values shared by the concept of social justice and presents a European model of society, which is at the heart of the idea of SGI. While (territorial) cohesion is based on the principles of spatial justice, it aims at the provision of SGI.

Another aspect of this relationship concerns the definition of the role of SGI built on the concept of serving the public. This covers the consideration of public needs that should be met, such as environmental protection, economic and social cohesion, responsible land-use planning, and promotion of consumer interests (EC 1996). What is the most important from the viewpoint of social and spatial justice is obtaining high-quality services at affordable prices (which is also a particular concern for consumers). The declared operating principles for SGI include continuity, equal access, universality and openness (EC 1996), which are all in line with the basic values promoted by social and spatial justice.

Figure 1. The relationship between social and spatial justice and services of general interest



Source: Author's construction

Mainly SSGI, and to a lesser extent, SGEI might fit into this concept. The principles establishing SGEI, while related to the operation of market economies and thus capable of counteracting social cohesion, can also partly express an aim to be just through the (state, regional or local) regulation of adequate delivery to the public (EAPN Services Group 2007). In the case of SSGI, the goal of being 'socially just' is more apparent. In a Communication from the European Commission on SSGI in the EU from 2006, the organisational characteristics of SSGI are described, *inter alia*, as an operation based on the solidarity principle. SSGI are also said to be 'comprehensive and personalised integrating the response to different needs to guarantee fundamental human rights and protect the most vulnerable' (EC 2006, p. 4). Other important elements of these operational modes are their non-profit character, the expression of citizenship capacity and the asymmetric (not normal supplier–consumer) relationship between providers and beneficiaries.

Concerning SGI, the provision of these services through other than regular market channels might be because reliance on the market alone cannot ensure the sufficient delivery of socially desirable objectives (Calleja 2015). According to Calleja, this is due to the inherent nature of market forces, which are not directed at dealing with health issues, poverty, unemployment or other social problems. Through these social aspects, the provision of SGI has an impact on the members of society at the individual level. In the Opinion of the European Economic and Social Committee on the above-cited Communication of the EC on SSGI, this impact is expressed in the manner of effective exercise of citizenship since SSGI 'underpin human dignity and guarantee the universal right to social justice and full respect of fundamental rights' (Calleja 2015; EESC 2007, p. 81).

Besides these principles, SGI not only play a role in promoting individual development but are also a key factor in the stabilisation of communities. This role can be interpreted (for instance) by observing the interrelationship between the decline/improvement of services and the tendencies of in-/out-migration from an area, or between the evolution and formation of labour market conditions, etc.

These individual and communal aspects of social sustainability are strongly related to different attributes of SGI, such as availability, accessibility, affordability and quality (or even variety) (Breuer and Milbert 2015; ESPON 2013a; Humer 2014; Opp 2017). These are already proclaimed as principles in the European Commission's communications on SGI (EC 1996, 2003). Nevertheless, the non-functioning or non-fulfilment of these principles (SGI attributes) may play an important role in generating social problems (social exclusion, poverty, etc.) and spatial injustices between (and within) different territories or in contributing to their reproduction.

Comprehensive studies related to the European spatial characteristics of SGI have explored different aspects of the above-mentioned attributes (e.g. ESPON 2011, 2013a 2017; Humer and Palma 2013). Patterns of inequalities related to SGI (illustrated by these studies) represent various spatial levels of injustice across Europe. Differences between older and newer (post-socialist) member states of the EU, and inequalities between urban centres and rural areas are probably the main features of the diversity of availability, accessibility, affordability or quality of services (Czyżewski and Polcyn 2016; ESPON 2013b; Milbert et al. 2013; Noguera and Ferrandis 2014; Noguera et al. 2009; Świątek, Komornicki and Siłka 2013).

At the same time, other territorial features (e.g. mountainous, remote or sparsely populated character), as well as historical factors or the operation of national political systems, may also influence this diversity. Disparities in SGI within separate member states of the EU might be affected mainly by national policies framing and providing systems of social transfers, education, healthcare, etc. (ESPON 2013b). The shortcomings of these institutions could trigger the process of evolution of spatial injustices. Nonetheless, the provision of public goods and services to structurally disadvantaged territories might also be considered a form of redistribution (Madanipour et al. 2017), and as such, a tool in the delivery of spatial justice.

Concerning the relationship between spatial justice and the significance of SGI, when considering service provision, spatial justice is often subordinated to economic growth (Gruber and Rauhut 2016). For instance, during crises, budget cuts and other austerity measures seriously affect both SGEI (e.g. transport) and SSGI (healthcare, education, etc.). These public expenditure cuts will also have an impact on the future provision and maintenance of SGI (ESPON 2013b).

The level of public service provision can contribute critically to socio-economic sustainability, especially in the case of rural areas, in the maintenance of their role as part of an integrated urban-rural system (ESPON 2013b). This, for example, can strengthen the creation of economic opportunities if the embeddedness of SGI is sufficient. The provision of SGI may also be linked to the solidarity side of spatial justice, by being an effective instrument for keeping such differences within and across European states and localities within manageable limits. This also contributes to the cohesion goals of the EU, which concern not only inclusion and solidarity but also eliminating inefficiencies in social institutions (Barca 2009).

In service provision, the focus on local levels is especially important. This principle was already expressed by the Barca Report: 'The goods and services concerned need to be tailored to places by eliciting and aggregating local preferences and knowledge and by taking account of linkages with other places' (Barca 2009, p. XI). From this viewpoint, place-based policies for enhancing social justice and inclusion can have a significant impact since they aspire to guarantee socially agreed essential standards and improve the well-being of the least advantaged through service provision (Barca 2009; Madanipour et al. 2017). Place-based policies and locally tailored services need to have a broad understanding of the role of local actors in

the development and provision of SGI to adequately position them in the promotion of spatial justice.

3. Methodology

The aim of establishing a theoretical linkage between (social and) spatial justice and SGI is driven by the intention of assessing the role of the provision and development of SGI in eliminating unjust situations and procedural practices, or even in the perpetuation of socio-spatial inequalities. The empirical part of this paper analyses this question by building on the findings of the case study work of the RELOCAL EU Horizon 2020 research project.

This research aimed to identify factors of access to European policies, explore local abilities essential to articulate needs and equality claims and assess local capacities for exploiting European opportunity structures (www.relocal.eu). Hence, local development initiatives were analysed through case studies. During this task, 33 case studies were implemented in 13 European countries. While they represented different policy environments, institutional contexts and welfare regimes, their common central question was: how are spatial justice and fairness defined and pursued at the level of local communities? This question was related to environmental sustainability, the strengthening of labour market integration, the struggle against stigmatisation and isolation, issues concerning urban rehabilitation and the development of governance practices; however, the emphasis has varied along with the analytical focus of the case studies.

The basic qualitative methods applied during the empirical work were analysis of policy documents, interviews and focus groups with stakeholders from different fields relating to the analysed actions (administrative, non-governmental and economic actors, authorities from different spatial levels, etc.). Due to context-sensitivity, national case study teams had a certain level of flexibility in translating the focal points of the issues to be studied (which served as guiding questions), by adjusting them to the respective cases (Weck and Kamuf 2020). Anthropological approaches were also applied during fieldwork, ranging from individual and group discussions to participant observation, to establish contact with members of the local communities and draw their aspects into the research.

The theoretical framework of the current study follows the understanding of RELOCAL research on spatial justice (Madanipour et al. 2017), and its analytical approach is based on the comparative logic of case studies setting up key categories and analytical and synthesising dimensions issued from the thematic focus of case studies (Weck and Kamuf 2020; Weck, Kamuf and Matzke 2020). Besides the thematic focal points mentioned, many actions studied in the RELOCAL EU H2020 project strongly relate to the development and provision of SGI at local levels or societal challenges arising from deficiencies in SGI (e.g. access to adequate housing, educational or childcare services, health care, etc.). The current analysis selected (and attempts to compare) six of them that study the relationship between spatial justice and the provision of SGI in East Central Europe (in the case study countries of Hungary, Poland and Romania). These states are among the main targets of European cohesion policies (from the RELOCAL case study sample), and are exposed to spatial injustices in the delivery of SGI due to their semi-peripheral position in Europe, as well as the still-varying policy context (shifts between centralisation and local autonomy), which defines procedural elements of service provision.

The comparison of the six cases by qualitative text analysis is based on three main questions as analytical dimensions. The first focuses on the introduction of case studies by identifying local characteristics and challenges of SGI. The second focal point emphasises the role of local, institutional, and governmental actors in the process of development and provision of these services. The main function of the third analytical focal point is to raise questions about how development actions of the presented SGI contribute to the promotion of spatial justice. While similarities among the cases in terms of the analysed phenomena are often emphasised, particularities are also highlighted.

4. Results

4.1. Characteristics and challenges of SGI from the viewpoint of analysed development actions

The presented RELOCAL case studies examined development actions related to SGI formulated based on local social needs and demands for equality. These development initiatives are primarily related to SSGI. At

the same time, the examined local characteristics of public services often form an interwoven set of problems of physical infrastructural elements, institutional deficiencies and social disadvantages, which led to the growth of territorial inequalities and the reproduction of socially unjust situations in the given place.

The aim of the social urban regeneration interventions in György-telep in Pécs starting in 2007 was to renovate the apartments (mostly without comfort) of the former mining colony and initiate the establishment of various social services (Table I). In this segregated area far from the city centre, investments and renovations of these municipally-owned social rental housing stock were rare, and not only were the housing conditions of the residents unfavourable but also their social status. Among the local Roma population, the rates of people with low educational attainment and unemployment are high. They also have to cope with disadvantages arising from isolation from the city centre and the stigmatisation associated with the area. Consequent to the social-urban rehabilitation actions, almost a hundred apartments in the area were renovated, with several residents getting better housing conditions by moving to integrated living environments within the city. Besides these housing initiatives, in the community centres established as part of the programmes, social assistance and education, and training services became available (Jelinek and Virág 2019).

The 'Give Kids a Chance' programme, which ran (until 2022) in several localities in Hungary, including the Encs district, was aimed at reducing inequalities in access to services by locally introducing and developing (mainly) services related to early childhood care, which might also improve the living conditions of those affected. In the case of Encs, Hernádvécse, and Csenyété, the three settlements examined in more detail within the Encs district, besides the revealed deficiencies in services (including healthcare and social care), the often-inadequate housing conditions or the integration of the population into the labour market (low educational attainment) are also regarded as challenges. Childcare and social assistance services were primarily expanded during the Give Kids a Chance programme but the action also included elements related to employment and training services, and social housing. At the same time, the initiative also contributed to the deepening of inequalities in some respects, as the regional centre (Encs) was primarily able to benefit from the available resources, compared to settlements in a more marginalised position (Keller and Virág 2019).

Table I. Development actions in focus – socio-economic challenges and deficiencies of local services

	Focus of the action	Deficiencies of services and their societal consequences	Range of services covered by the development action	Position of the locality
Urban regeneration programme (Pécs – György-telep)	Renovation of low-comfort housing units, operation of a range of social services	High ratio of low-comfort housing units, residents with low qualifications, disadvantaged labour market conditions, isolation from the city centre, stigmatisation	Social housing, social care, education and training services	Segregated neighbourhood in the area of a former mining colony, far from the city centre
Give Kids a Chance programme (Encs district)	Development of early childhood care and the improvement of residents' living conditions	Deficiencies in health and social care, low qualification, disadvantaged housing conditions	Childcare, social care, labour market and training services, social housing, ICT	Disadvantaged location, spatial inequalities within the district (centre vs. marginalised settlements)
Participatory budget (Łódź)	Involvement of the residents in city development decision-making processes through the participatory budget	Low quality of educational, cultural and health infrastructure, disadvantaged living conditions, negative demographic trends, poor health conditions, high unemployment	Education, health care, ICT	Metropolitan area with the accumulation of societal problems both in certain inner and peripheral districts

Table I. Development actions in focus – socio-economic challenges and deficiencies of local services

	Focus of the action	Deficiencies of services and their societal consequences	Range of services covered by the development action	Position of the locality
Social cooperative (Brzeziny)	The operation of a social cooperative dealing with public cleaning and maintenance work with the involvement of local inhabitants	Ageing housing stock, high unemployment, dependence on social care, selective emigration, negative perception of public spaces	Waste processing, public space maintenance, construction, and repair work	Disadvantaged small town in the shadow of a metropolitan area (Łódź)
Desegregation programme (Cluj-Napoca – Pata-Rât)	Promoting the social inclusion of inhabitants by providing housing and education services	Housing deprivation, low access to adequate education, healthcare and working opportunities, environmental pollution	Social housing, health care and educational services	Segregated neighbourhood within a city, located in the vicinity of a landfill
Legalisation of an informal settlement (Codlea – Mălin)	Legalisation of unorganised housing and ownership conditions	Poor residential environment and settlement infrastructure, low qualification, high drop-out rates of students	Social housing	Low-status neighbourhood in a small town, mainly with informal residents

Source: RELOCAL case studies

An initiative of participatory budget in Łódź, Poland, which has been operative since the beginning of 2010, started with the intention of involving the residents in the city development decision-making processes. In recent decades, several unfavourable social processes have been operating in the Polish metropolis, which has now led to negative demographic trends, low quality of life, and the concentration of health problems and unemployment in both some inner and peripheral districts of Łódź. The impact of these processes was also amplified by the shortcomings of the educational, cultural and health infrastructure. Through the participatory budgeting programme, the city has made residents interested in taking part in public life. Residents can thus offer proposals for the use of a certain share of the city's development resources and decide on the initiatives to be implemented. Since the beginning of this initiative, several educational and health programme elements have been implemented through this action (Dmochowska-Dudek et al. 2019).

The social cooperative, initiated in 2010 by a group of local unemployed in Brzeziny, Poland, and operated by the town's government since 2012, primarily performs public cleaning and maintenance work in the town with the involvement of local residents. The disadvantaged small town in the neighbourhood of Łódź faces many social challenges, such as selective emigration, high unemployment or dependence on social care. In addition, the city's ageing housing stock and the negative perception regarding public spaces are also crucial challenges for the settlement. The examined social cooperative primarily aims to contribute to the development of services related to public spaces, by carrying out waste processing, public space maintenance, construction and repair work (Jeziorska-Biel et al. 2019).

One of the target areas of the desegregation programme in Cluj-Napoca, which ran between 2014 and 2017, was the Pata-Rât segregated neighbourhood, next to one of the city's landfills. The development action aimed to promote the social inclusion of the residents (predominantly Roma), to enable more favourable access to housing and education services. In the case of the Pata-Rât neighbourhood, evictions from other parts of Cluj contributed to the worsening of housing problems in the area, which were further aggravated by budget cuts that narrowed the range of social services, greatly affecting the local community's socio-economic situation (Bădiță and Vincze 2019). These disadvantages (which are also signs of institutional racism) led to the accelerated stigmatisation of the affected

areas and, by mutually reinforcing social and economic disadvantages (insufficient access to adequate education, healthcare and jobs), led to ghettoization. At the same time, the desegregation programme was narrowly tailored and has not only failed to contribute to the improvement of local living conditions but has also led to the further relocation of a few dozen families to other settlements (in the Cluj-Napoca area). In addition, the range of available educational and cultural services, as well as the possibility of social and healthcare, have expanded only to a limited extent (Bădiță and Vincze 2019).

Another investigated intervention in Romania implemented in the Mălin residential area of Codlea town focused on a possible solution to the issue of informal housing. The legalisation of the housing situation of Roma residents living in unorganised housing and ownership conditions in this low-status part of the settlement arose because, on the one hand, according to Romanian regulations, legal housing is a condition for ensuring involvement in the social security network and formal labour market participation. On the other hand, this informal situation strengthens the uncertainty of ownership rights and the impact of unfavourable housing conditions, apart from hindering the population's access to development resources. From the viewpoint of SGI, besides the poor condition of the residential environment and settlement infrastructure, difficulties in accessing educational services might be highlighted in this segregated area. Social problems in this neighbourhood are reinforced by the population's low education level and high school dropout rates among youth. Through the implementation of the project, only 10% of the intended number of beneficiaries (fifteen families) were able to resolve their housing situation (Hossu and Vincze 2019).

4.2. The role of local, institutional and governmental actors

From the viewpoint of a given type of service, the activity of actors involved in its provision is determined by their position in territorial scales (local, national and supra-national) and social sectors (public or private institutions, NGOs), even by their institutional role, and regulations determine their margin in actions (e.g. compulsory tasks of local governments).

Among actors from higher territorial scales (national and supranational), the role of the EU and governmental institutions should be highlighted

(Table II). Development actions aimed at the improvement of diverse SGI represented by the cited RELOCAL case studies have adopted different forms of financing opportunities provided by EU Structural Funds (ERDF, ESF) or other international funding schemes and donor organisations, such as the Norway Grant, or UNDP, which also had a managerial role in the desegregation programme in Cluj-Napoca (Bădiță and Vincze 2019). This also means that the EU has a key role in the definition of priorities and regulations relating to SGI development. In other words, it is possible to realise local development ideas in line with EU directives (Jelinek and Virág 2019; Hossu and Vincze 2019; Virág and Jelinek 2019).

EU priorities are usually translated into local initiatives by institutions of national governments (Tésits, Alpek and Hoványi 2019). Governmental actors not only have a role in forming the institutional and policy background for SGI but also directly participate in actions focusing on the local development of services. For instance, in the Give Kids a Chance programme in Hungary, the government had a coordinating role through background institutions (due to its position as a funder), which contributed to the strengthening of the central state's position in local public service provision (Keller and Virág 2019b). In other cases, these initiatives were also often supported by the state budget, or, as the project of legalisation of informal housing in Codlea shows, the action itself was initiated by a governmental body (Hossu and Vincze 2019).

Local authorities play various roles in SGI provision and development, and this is often defined by national laws. At the same time, municipalities often represent the local voice in the planning and implementation of development programmes aimed at SGI. This could mean that they manifest political will with a broad mandate during different phases of SGI development (financing, brokerage, coordination, technical role, bureaucracy, administrative management, dissemination, etc.), as in the case of social housing projects in György-telep, Pécs (Jelinek and Virág 2019) or the Málin-Codlea project (Hossu and Vincze 2019). Besides the activity of different municipal authority units during these processes – partly arising from their compulsory tasks, the mayor of a municipality also has a dominant (supportive, promoter, etc.) role, as in the case of the social cooperative in Brzeziny, initiated by the local mayor (Jeziorska-Biel et al. 2019).

Examples of the attempts to develop childcare services in the Encs district show that the influence of local governments in the maintenance and development of local institutions can also decrease over time due to the increased centralisation efforts by the national government (Keller and Virág 2019a). The example of the Give Kids a Chance programme shows that the voice of local authorities may also represent an asymmetric appearance of local aspirations in place-based SGI development if interests of the local civil society (e.g. residents, NGOs, marginalised social groups) are missing during the process. On the other hand, the participatory budget project from Lodz represents an example of a bottom-up action, in which residents expended a part of the city budget to address local community needs based on a social contract among them, the mayor and the city council (Dmochowska-Dudek, et al. 2019).

For the cited case studies, a significant part of the local provision of SGI and the implementation of development programmes belong to local public institutions, NGOs and other organisations, which can therefore be considered key actors in service delivery (Jelinek and Virág 2019; Keller and Virág 2019a; Virág and Jelinek 2019). In the Polish case of Brzeziny, the social cooperative is simultaneously the subject of the development action and the service provider, with its activity in waste management, cleaning, construction and repair works (Jeziorska-Biel et al. 2019). Currently, the main member of the cooperative is the city itself, which provides several indispensable urban services and employment opportunities through this organisation.

In other cases, due to the high level of embeddedness and lobby activity, local public institutions and NGOs (with local representation and government support) also have a key role in planning, managing, coordinating, brokerage, and promotion activities during the implementation of SGI development (Jelinek and Virág 2019). Organisations such as the Give Kids a Chance Office within the Multi-Purpose Micro-Regional Association of Encs, or the Hungarian Charity Service of the Order of Malta (often referred to simply as 'Málta' in Hungary) also participate in actual service activities, such as the provision of social care services and social work assisting families (Jelinek and Virág 2019; Keller and Virág 2019b).

The example of 'Málta' shows that the role of non-governmental actors on occasion goes beyond competence relating to service provision. In the case of social housing projects in György-telep (Pécs), 'Málta' (which also

Table II. The role of different actors in the analysed SGI development initiatives

	EU and other supra-national organisations	National government and authorities	Local authorities and government	Other actors (public institutions, settlement associations, NGOs, inhabitants)
Urban regeneration programme (Pécs – György-telep)	Funding (EU – ERDF, ESF)		Funding, coordination, brokerage, technical role	Coordination, social care, social work (Málta) Representation of local interests, training (Roma NGO) Participation in the implementation of the project (inhabitants)
Give Kids a Chance programme (Encs district)	Funding (EU – ESF, Norway Grant)	Coordination (by background institutions)	Representation of the local voice in planning and implementation	Management, local coordination, social care (regional association of settlements) Programme design (Málta)
Participatory budget (Łódź)			Funding, initiation, coordination	Participation in making proposals and decisions on development actions (inhabitants)
Social cooperative (Brzeziny)	Funding (EU – ESF)		Funding, initiation, and maintenance of operation	Service provision (social cooperative)
Desegregation programme (Cluj-Napoca – Pata-Rât)	Funding (Norway Grant), management (UNDP)		Coordination, planning, administration (local government), social work (city hall department)	Representation of local interests, brokerage (Roma NGO) Consultation role (other NGOs)
Legalisation of an informal settlement (Codlea – Mălin)		Funding	Funding, coordination, administration, dissemination	Initiation, coordination (Roma NGO)

Source: RELOCAL case studies

has a coordinating role in the implementation of the national strategy for the integration of Roma in Hungary) gained an expanded authority, a kind of shadow governmental role, by informally taking over supposedly municipal tasks from the local government (Jelinek and Virág 2019; Keller and Virág 2021; Virág and Jelinek 2019). In the Give Kids a Chance child-care development programmes, 'Málta,' by having a key role again, had the mandate to define the local programme design, which worked against the operation of place-based solutions (Keller and Virág 2019a, b).

These asymmetric power relations also lead to deficiencies in cooperation, as in Pécs, where a Roma NGO with a bottom-up organisation played an important role in local development by running educational and cultural programmes and representing the local Roma aspects (interests); however, due to its small institutional capacity, it was later side-lined in decision making on social development (housing and assistance) projects (Jelinek and Virág 2019, Virág and Jelinek 2019). Similar asymmetries are also reflected in the analysed Romanian cases focusing on actions relating to housing challenges. Here, the participating NGOs usually have a mediatory role between the beneficiaries and other actors of the projects, but their activity does not ensure that members of the communities are the real participants instead of the collateral stakeholders. In Cluj-Napoca, a Roma association from Pata-Rât was part of the residential desegregation programme (mostly for credibility with local people) but was able to participate in few contexts and represented only a part of the community (Bădiță and Vincze 2019), while in Codlea, a Roma NGO (from another nearby locality) was the initiator of the action, which poses the question of the legitimacy of its activity (Hossu and Vincze 2019).

5. Discussion – Development and provision of SGI concerning the promotion of spatial justice

Policy documents and communications on SGI provision (e.g. EC 1996, 2003) provide only principles on their role in aiming at cohesion goals and the promotion of spatial justice. On the other hand, they provide empirical feedback if the analysed cases in the study are also examined from the viewpoint of the actual contribution of the implemented service-focused developments to the advancement of spatial justice in the given place, and

what could have caused it if a given intervention was more in the direction of the reproduction of inequalities.

It generally applies to the service-related and infrastructural developments that, although these interventions have achieved many direct, short-term results in reducing inequalities and social integration, their long-term effect can be questioned by interpreting the temporal and spatial context of the developments (the issue of maintenance after the end of the project, dilemmas of regional embeddedness, etc.). From this aspect, the success seems to be persistent in Brzeziny, where the launch of the social cooperative – which is not only operated in a fixed-term form – induced favourable changes (new functions and access to public spaces of the municipality) and helped the reintegration of socially-excluded persons through employment opportunities (Jeziorska-Biel et al. 2019). Social housing projects in György-telep (Pécs) contributed to the significant improvement of living conditions in the area (Jelinek and Virág 2019; Virág and Jelinek 2019). Nonetheless, the local development focus on large-scale city projects, postponed development and the impact of the economic crisis have resulted in growing spatial and social inequalities compared to the city of Pécs itself and, thus, the systematic reproduction of injustice (Keller and Virág 2021). The results of the analysed actions relating to housing issues in Romania are also ambiguous. The proportion of beneficiaries in these marginalised communities was low (about 10%) due to financial constraints (of either the project or the residents), and no real and wide-ranging improvement of living conditions was achieved by the development actions (Vincze, Bădiță and Hossu 2019).

The Give Kids a Chance programme too led only to a temporary and partial improvement in the distribution and quality of child welfare services, with low success in mitigating spatial inequalities in the micro-region and the absence of institutional change (Keller and Virág 2019b). As a direct result of the analysed actions, the usually temporarily supplemented services (e.g. social care, education, healthcare) and employment opportunities have often struggled or ceased after the end of the programme since projects were dependent on external resources (EU funds, Norway Grant, etc.), and no resources were available to sustain the services. However, the analysed actions were also regarded as steps in a learning process for later activities in local development and service provision (Vincze, Bădiță and Hossu 2019).

Besides financial reasons, both local practices in service provision and the method of implementation are also responsible for failures in the promotion of spatial justice. Among these factors, several cases suffered from a lack of transparency and effective coordination related to how the developments were implemented, but controversial institutional practices also occurred in the investigated initiatives, affecting the population groups that are the target of the developments and the circle of partners participating in the implementation. In György-telep (Pécs), the unaccountable and non-transparent social housing provision and management represented such a constraint to the effectiveness of the urban rehabilitation interventions.

Deficiencies in implementation and the lack of transparency (poor communication between parties, low level of residential participation, lack of efficient coordination, financial demands towards beneficiaries, etc.) were also problematic from the viewpoint of the process of legalisation of informal housing in Codlea, and the action led to the creation of new forms of inequalities among community members (Hossu and Vincze 2019). Coordination issues and institutional practices (overlapping roles, the exclusion of local communities from decision-making, delayed housing components of the action, etc.) also hindered the desegregation project in Pata-Rât, Cluj-Napoca from being effective in ameliorating spatial injustices (Bădiță and Vincze 2019).

The most important sources of injustice during the development of SGI-related projects in the analysed cases were the hierarchical dependencies between a variety of local actors and the dominant role of certain actors that created asymmetrical power relations and caused injustice between both social groups and spaces (Madanipour et al. 2017). The tensions resulting from unequal power relations caused the exclusion of some areas, partner groups and, above all, the population most affected by the service developments during the implementation of the initiatives; hence, they had little impact on influencing the developments. Regarding the provision of childcare services in the district of Encs, smaller villages are disadvantaged compared to micro-regional centres, while these centres are highly dependent on the central state (Keller and Virág 2019a, b). Moreover, the dominant role of local governments in local development led to the absence of competing visions, resulting in a lack of representation of marginalised groups in the planning and definition of goals (even if they were consulted). This practice hinders members of these communities

from actively employing their capabilities to strive for a more just society, not just remaining passive beneficiaries (Calleja 2015; Madanipour et al, 2017; Sen 1999, 2009). This was a problem in the Romanian cases too (Bădiță and Vincze 2019; Hossu and Vincze 2019). In the case of the social cooperative in Brzeziny, strong ties with local authorities and the leadership of the municipality are interpreted as advantages (Jeziorska-Biel et al. 2019), but the 'local hero' narratives relating to the mayor and the head of the cooperative, and multiple dependencies on the activity of the local government, make this relationship ambiguous.

The residential desegregation programme in Cluj-Napoca was especially exposed to asymmetric power relations. Here, the local government has not provided real access to social housing for marginalised residents of Pata-Rât but has externalised this problem towards projects financed by international donors. Further, the municipality per se was not a direct member of the project team, but only through a municipal association in which it had the dominant role, and which implemented the relocation of inhabitants from the segregated area of Pata-Rât in neighbouring settlements (Bădiță and Vincze 2019). The social housing development programme in György-telep (Pécs) was more successful in this sense since the housing projects were able to build on local capacities, through the participation of local inhabitants (trained and employed by the programme), the collective definition of goals, and the use of local resources or voluntary work (Jelinek and Virág 2019; Virág and Jelinek 2019).

Both in György-telep and in the case of the Pata-Cluj residential desegregation project, the mode of relocation of dwellers from segregated areas to an integrated environment in social housing programmes was a key element of reproducing injustices (Bădiță and Vincze 2019; Jelinek and Virág 2019). While the practice of relocations partly followed the preferences of families (e.g. to preserve kinship networks), the will of the key stakeholders (Pécs municipality or the implementing organisations in Cluj-Napoca) was more dominant in determining relocations. Consequently, besides growing living costs, relocations have not solved individual social problems.

While the importance of place-based logic building on local needs and preferences in the provision of services is emphasised in EU cohesion policy recommendations, e.g. in the Barca report (Barca 2009), the frameworks of the SGI development programmes, lacking these aspects, can themselves

lead to the increase of unfair solutions in the reviewed cases. From this viewpoint, in particular, the unequal or too narrow aspects of the selection of beneficiaries, and the inflexibility of the individual components in project-based developments can be identified as factors limiting the fair implementation of the initiatives in the cases examined. The distribution of funds within the participatory budget action in Lodz mostly uses normative criteria (number of inhabitants, allocation differences among city units) (Dmochowska-Dudek et al. 2019), which does not necessarily meet the softer aspects of local needs. Housing-related actions that had different programme rounds followed different logic, becoming a source of selective and unjust practices through, for example, narrow targeting (Hossu and Vincze 2019; Jelinek and Virág 2019). In these circumstances, flexibility in implementation is crucial. For instance, in the case of the residential desegregation programme in Cluj-Napoca, changes in project goals and elements were allowed based on ground realities (Bădiță and Vincze 2019). By contrast, mandatory components, regulations, bureaucratic elements and limited flexibility during implementation representing e.g. central state control in the definition of goals and means of local elements of the development of SGI led to significant procedural and distributive unfairness during implementation, by also weakening the effective application of place-based logics (Hossu and Vincze 2019; Keller and Virág 2019a).

6. Conclusions

This study presents how the principles of justice in social sciences and the values expressed by the idea of SGI meet, by sharing the interests of the EU along with key elements of a European model of society and (territorial) cohesion. Aspirations for the just delivery of SGI support social sustainability and solidarity and can contribute to the amelioration of socio-spatial inequalities in the provision of services through distributive elements or the procedural practices of service-provider institutions. Nonetheless, there is a chance of this process failing since the mode of development of SGI often plays a bigger role in the reproduction of spatial injustices.

The case studies analysed in this paper identify challenges for SGI relating both to the inadequacy of physical elements of infrastructure and deficiencies in institutional capacities. These disadvantages rarely have

just an isolated impact; they also contribute to the perpetuation of unjust social and economic situations in a broader sense. Shortages in SGI not only reproduce inequalities materially but often lead to the exclusion and stigmatisation of the affected communities.

The position of actors in different territorial structures is a key aspect in assessing their role in service development and provision. International organisations, national governments and local authorities often dispose of financing and development opportunities and frame the procedural practices of service provider institutions. This also shapes power relations between them and other promoter organisations, such as local associations and non-governmental actors. But most importantly, asymmetric power relations most affect the beneficiaries of these actions who are rarely real stakeholders involved in decision-making.

By focusing on these characteristics relating to the problem of SGI development and provision, this research raises questions about how the delivery of SGI contributes to the goals of achieving spatial justice. Development actions analysed in the case studies often reflect an ambiguous picture in terms of the success of these projects. While the accomplishment of housing or educational initiatives, etc. can contribute to an improvement in the beneficiaries' social and living conditions, these achievements are also limited by the framework of the programmes themselves (timing, sustainability, rigid regulations, etc.). The operation of local practices, methods of implementation of development projects and procedural elements in service provision – coordination, accountability, lack of transparency, selectivity, etc. – can also cause unfair situations that act against the promotion of spatial justice. Nevertheless, the investigated cases also represent ongoing actions and are often interpreted as parts of a learning process, with the ambition of making future practices of SGI development and provision more just.

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