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EDITORIAL

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Solidarity in Diversity: Overcoming Marginalisation in Society

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Abstract

This introduction situates the thematic issue within the discourse on solidarity, exploring its transformative role in addressing marginalisation and fostering social cohesion. The 13 articles in this issue are organised into four themes: (a) solidarity's response to exclusion, (b) its dynamic nature in contested contexts, (c) innovative frameworks, and (d) its role in tackling economic inequalities. Through case studies of migrant communities, Roma graduates, neurodivergent artists, and trans women, the contributions highlight solidarity's potential to counter exclusion, navigate tensions, and inspire collective action. Bridging theory and practice, this thematic issue advances understanding and informs policies to address systemic inequality, diversity, and injustice.

Keywords

diversity; marginalisation; polorisation; solidarity

1. Introduction

In this thematic issue, we bring together interdisciplinary scholarship to examine solidarity as a critical mechanism to address societal marginalisation. In an era of growing social divisions and complex challenges, we aim to create a space for scholars and policymakers to engage in meaningful dialogue. Building on Bauböck and Scholten's 2016 special issue on solidarity in diverse societies (Bauböck & Scholten, 2016) and Robert Mordacci's 2024 special issue on the challenges of solidarity in a critical age (Mordacci, 2024), we respond to the shifting social landscape from 2016 to 2024. While earlier work offered valuable insights, the unprecedented complexity of recent challenges requires fresh analysis to examine dimensions of solidarity previously overlooked. Our objective is to deepen scholarly understanding, raise critical awareness, and inform policy interventions.

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We found it necessary to revisit the topic of solidarity, given the proliferation of divisive issues in recent years. Although the earlier focus on immigration in Western societies was foundational, contemporary developments—spanning global inequality, migration, populism, and intersectional oppression—demand broader engagement. In this thematic issue, we address emerging concerns and fill gaps left by prior studies, broadening the analytical framework for understanding solidarity and its role in fostering social cohesion. By advancing knowledge and raising awareness of these pressing issues, we aim to generate actionable insights that shape inclusive policies and practices.

This thematic issue features articles that collectively map the contours of solidarity and diversity. In the next section, we provide an overview of these concepts, establishing the foundation for the broader discussion. Subsequent sections summarise the contributing authors' key arguments, offering theoretical and empirical insights into fostering solidarity which are geographically and thematically diverse. These articles capture unique narratives, engage with diverse theories, and address a salient topic of public and scholarly interest. Through this collection, we aim to demonstrate solidarity's transformative potential, its challenges, and its role in advancing a more inclusive society.

2. Solidarity as an Antidote to Overcoming Marginalisation in Society

Solidarity, broadly conceived as a unifying bond based on mutual support or shared interests, has long been a subject of scholarly inquiry (Jones, 2013; Miller, 2002). As Tiryakian (2005, p. 307) describes, it represents "a rich network of social ties" voluntarily entered into, providing both fulfillment and obligations. Despite decades of exploration, solidarity remains vital to addressing the ongoing marginalisation, oppression, and exclusion of vulnerable groups. Yet, the complexities surrounding who or what to support in solidarity persist, revealing inherent tensions in its application. These debates often revolve around distinctions of belonging, as illustrated by Kymlicka (2015, 2020), who critiques the contradictions between national solidarity and the support for multiculturalism. Such dilemmas reduce solidarity to an "us versus them" binary, complicating its transformative potential.

Diversity, an inherent feature of all societies, further underscores the importance of solidarity. While diversity brings numerous societal benefits (Banks et al., 2001; Smith & Schonfeld, 2000), it can also become a source of tension if poorly managed (Smelser & Alexander, 1999). Recent trends, such as the banning of books on race, gender, and sexuality in the United States (Tylenda, 2024) and the divisive discourse surrounding Australia's "Voice" referendum (Birrell & Betts, 2023; Ch'ng et al., 2024; Windschuttle, 2023), exemplify efforts to suppress diverse perspectives under the guise of unity. These actions highlight the challenges posed by attempts to silence marginalised voices, reinforcing the need for solidarity to counter such exclusionary practices.

Solidarity plays a critical role in amplifying the perspectives of marginalised individuals and groups, fostering awareness, and driving structural change. When grounded in moral conviction, solidarity transcends differences, uniting individuals and groups in their efforts to challenge marginalisation and inequality. Its contested nature, however, reflects broader societal divisions, with growing inequality and nationalist populism undermining its effectiveness. Despite this, solidarity has historically demonstrated its power in mobilising support to address critical issues such as the abolition of slavery, decolonisation, and the fight against apartheid. More recently, global protests following George Floyd's murder exemplified solidarity's

potential to unite people across the world while simultaneously exposing persistent racism and its varied manifestations.

The Covid-19 pandemic further tested solidarity by exacerbating existing inequalities and exposing the vulnerabilities of marginalised groups. Social contracts between governments and citizens fractured, and the pandemic revealed a profound lack of structural support for those most in need. This crisis underscores the urgent need to reimagine solidarity as a mechanism for addressing societal challenges, fostering inclusivity, and reducing marginalisation.

In academia and public discourse, solidarity has also become a focal point, particularly in debates over decolonising knowledge production and amplifying minority voices. While these efforts have brought attention to systemic inequities, their tangible impact remains uncertain. These ongoing dialectical debates highlight the evolving nature of solidarity and its potential to shape inclusive societies. By integrating solidarity with an appreciation of diversity, we can better address the systemic injustices that continue to define contemporary societies.

3. Emergent Themes From the Contributing Articles

This thematic issue examines the multi-faceted dimensions of solidarity, exploring its transformative potential across diverse contexts and challenges. The articles are organized around four key themes. The first focuses on solidarity as a response to systemic marginalization, highlighting how collective efforts address exclusion and foster inclusivity. The second theme investigates the complexities of solidarity within multicultural and politically charged environments, unpacking how it evolves and adapts in contested spaces. The third explores innovative theoretical frameworks that expand our understanding of solidarity, proposing new ways of conceptualizing and operationalizing it. Finally, the fourth theme delves into economic marginalization, demonstrating how solidarity-driven policies and practices can address entrenched inequalities and create pathways for empowerment. Together, these articles provide a comprehensive exploration of solidarity's role in fostering social justice and collective transformation, while offering insights into its theoretical, practical, and policy implications.

Several articles emphasize solidarity's transformative role in addressing systemic marginalization. Tebeje Molla explores the potential of engaged scholarship to drive societal transformation by fostering inclusive narratives and practices. While highlighting its potential, Molla identifies key challenges, such as ethical dilemmas, scholar burnout, and polarized knowledge systems, that hinder these efforts. Building supportive ecosystems for scholars and prioritizing the co-creation of knowledge is critical to overcoming these barriers and sustaining engaged scholarship. Similarly, Tamara Hernández Araya examines how migrant organizations in Chile redefine solidarity as an ethical project grounded in care. By constructing alternative citizenship narratives, these organizations foster collective identity, illustrating how solidarity can challenge exclusionary practices and create inclusive communities. In the Chinese context, Qian Xue and Bo Chen reveal how ableist recruitment practices within government agencies perpetuate the exclusion of disabled individuals. Their analysis demonstrates that judicial efforts to enforce diversity face systemic barriers, highlighting the need to eliminate political obstacles to workplace diversity and equity.

The complexities of solidarity in multicultural and politically charged contexts are another focus. Violetta Zentai and Margit Feischmidt investigate how civic actors in Hungary navigate solidarity dilemmas under an

authoritarian regime. These actors move beyond humanitarianism, adopting anti-discriminatory and interdependent approaches to support displaced Ukrainians. The study illustrates how solidarity can evolve in restrictive political environments to challenge systemic injustices. Judit Durst, Margit Feischmidt, and Zsanna Nyírő focus on the supportive networks enabling Roma social mobility in Hungary. Their work highlights how solidarity fosters upward mobility and empowers marginalized individuals to become agents of social change. Franka Vaughan examines the experiences of Liberian diaspora communities negotiating dual citizenship. By seeking legal recognition in both host and home countries, these communities address dual marginalization and highlight the complex intersections of identity, belonging, and citizenship.

Expanding the conceptual boundaries of solidarity, several authors propose innovative theoretical frameworks. Óscar García Agustín and Martin Bak Jørgensen introduce "commoning cosmopolitanism," a sociospatial framework that links solidarity with class struggle, spatial inclusion, and diverse communities. This framework challenges exclusionary practices by promoting solidarity as a universal principle grounded in local action. Anna Püschel focuses on neurodivergent individuals in the art world, redefining stimming behaviors as radical acts of self-care and inclusion. Her work advocates for structural changes that accommodate neurodivergent needs, demonstrating how solidarity can challenge traditional norms and create more inclusive spaces. Jolita Vveinhardt and Mykolas Deikus explore bystander behavior in workplace bullying through the lens of synderesis, examining three response types: constructive active support for victims, destructive active support for perpetrators, and destructive passive non-intervention. Their analysis draws on consequentialist, utilitarian, and synderetic ethical frameworks to understand these behavioral choices. Matthew Mabefam, Kennedy Mbeva, and Issah Wumbla examine the potential of solidarity to address global challenges amidst resistance and dissent. They argue that solidarity, despite its challenges, remains a viable concept for addressing today's most pressing issues.

Economic marginalization is explored through various lenses. Siyanda Buyile Shabalala and Megan Campbell examine the structural exclusions faced by trans women in South Africa, exposing how binary gender norms perpetuate economic inequities. They call for intersectional policies that explicitly address trans positions within labor systems, underscoring the need for solidarity-driven reform. Charles Gyan and Jacob Kwakye explore how Ghanaian women leverage solidarity and familial networks to overcome economic barriers. Their study emphasizes the role of community-level support systems in fostering resilience and enabling economic empowerment. Neeltje Spit, Evelien Tonkens, and Margo Trappenburg highlight the emotional labor of volunteers supporting refugee integration in the Netherlands. Their research demonstrates how solidarity is deeply shaped by emotional struggles and triumphs, urging policymakers to consider these dynamics in creating inclusive systems.

Collectively, these contributions deepen our understanding of solidarity across diverse contexts, addressing marginalization, contested political spaces, theoretical innovation, and economic justice. Each article demonstrates solidarity's dual role as a tool for empowerment and a response to systemic injustices, offering valuable insights for future research and practical interventions.

4. Conclusion

This thematic issue underscores the transformative potential of solidarity in addressing marginalisation, navigating contested spaces, and fostering inclusion. The contributions highlight solidarity's capacity to

inspire societal change, from supporting marginalised groups like Roma graduates, trans women, and disabled individuals to reimagining citizenship and community through care ethics and sociospatial frameworks. They also reveal its complexities, such as navigating dilemmas within authoritarian regimes, addressing cultural hybridity, and countering economic and systemic inequalities.

Future research could expand and deepen the exploration of solidarity's dual nature—its ability to unite and its potential to exacerbate divisions—while examining how it functions in digitally mediated, transnational, and intersectional contexts. Investigating aspects like engaged scholarship, neurodivergent inclusion, and cosmopolitan commoning could provide new pathways for understanding and operationalising solidarity. Finally, research could focus on how solidarity-driven policies can tackle entrenched economic disparities and systemic marginalisation, offering practical strategies for fostering more equitable and inclusive societies.

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Conflict of Interests

The authors declare no conflict of interests.

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ARTICLE

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Engaged Scholarship and Its Discontents

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Abstract

Engaged scholarship plays a crucial role in shaping collective narratives and fostering inclusive societies. This article explores the concept of engaged scholarship, highlighting both its transformative potential and the discontents that accompany it. Informed by existing literature and personal reflections, the discussion is divided into three key sections. The first section provides a concise overview of engaged scholarship and outlines the conditions that enable its practice. The second section delves into the main discontents of engaged scholarship: narrow definitions of academic work, polarised views on knowledge and truth, restrictive professional guidelines, the potential for backlash, and the risk of burnout. These pitfalls create an environment where scholars may hesitate to engage fully, despite the pressing need for their contributions to public discourse. In the third and final section, the article emphasises the moral imperative of using research for social change and advocates for the creation of supportive ecosystems to help scholars navigate the challenges of public engagement.

Keywords

backlash; Bourdieu; burnout; crisis; critical theory; engaged scholarship

1. Introduction

I am a sociologist of education. My research focuses on disadvantages and policy responses in education. For the last six years, I have investigated educational opportunities, experiences, and outcomes of African-heritage youth in Australia. I regularly find myself contemplating avenues for translating my findings beyond conventional scholarly channels and communications. I explore ways to translate my knowledge of disadvantage, discrimination, and domination into actionable initiatives that address the root causes of these social ills. I use alternative dissemination mechanisms to reach the wider public and make a positive

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difference in the lives of young people experiencing vulnerabilities. This fervent desire to go beyond the confines of academia has propelled me into the realm of engaged scholarship.

At the core of public-facing engagement lies the conviction that conducting social research merely for knowledge acquisition holds limited significance. We cannot presume that our scholarly publications alone can bring about the positive societal changes we desire. While scholarly publications and communications are vital vehicles for disseminating research insights, the transformative potential of our expertise lies in its application beyond the academic realm—when we intervene in the political field where groups contend for power, influence, and control over institutions, political narratives, and policy discourses. As social researchers, we should ask if our ideas work for society. Importantly, echoing Bourdieu (2003), I would argue that if a certain group in society is unjustly treated or disadvantaged, those who think we know about this issue in advance have a moral duty to publicise the problem, advocate for change, and demand public action.

In this respect, engaged scholarship emerges as a pivotal avenue through which we can bridge the gap between academic knowledge and demand for change in the real world. In other words, engaged scholarship represents a crucial facet of academic labour that involves collaborating with communities and aims to help identify and transform pressing needs among individuals and groups facing challenges that may otherwise be overlooked (Hoffman, 2021). The argument is straightforward: Rather than confining ourselves to the boundaries of our social location, as committed scholars, we must actively seek avenues to collaborate with communities, policymakers, and advocacy groups—to engage in "public reasoning" (Sen, 2009). Engaged scholarship may take different forms: directing research attention to overlooked public issues, working in partnership with communities to generate accessible and relevant knowledge, using research findings to publicise critical problems and call for public action, and/or publicly expressing solidarity with the disadvantaged (Boyer, 1996; Cann & Demeulenaere, 2020; Collins, 2013; Doyle, 2018; Hoffman, 2021; Kajner & Shultz, 2013; Molla, 2024a). In terms of publicising overlooked public issues, engaged scholars may deliver public lectures, actively engage with the media, take advisory roles within government departments, develop policy briefs, write public submissions, and volunteer for community services.

However, from my own experiences and in the literature, it is clear that engaged scholarship is not without its discontents. Engaged scholars face numerous challenges as they navigate the boundaries between the academic and public spheres. This article aims to unmask internal and external challenges that make scholars hesitant to engage with the public. The following research question guides the article: What constrains the practice of engaged scholarship?

Understanding the challenges faced by engaged scholars is crucial for institutions to address the systemic issues that limit the broader impact of research. By identifying these obstacles, universities, and other academic bodies can develop effective support structures that empower scholars to engage more freely with public discourse and societal challenges. This recognition, in turn, ensures that research becomes more socially relevant, aligning with the pressing needs of communities and policy debates. Eventually fostering a supportive environment for engaged scholarship helps bridge the gap between academia and society, enhancing the role of scholarship in driving meaningful change.

The remaining discussion is organised into three sections. The first section briefly discusses the meaning of engaged scholarship. The second section outlines six drivers of engaged scholarship. The third section covers the challenges of public-facing academic engagement. The article closes with concluding remarks.

2. What Do We Mean by Engaged Scholarship?

The idea of engaged scholarship underscores the importance of being responsive to pressing societal issues and leveraging one's expertise to instigate positive societal transformations. Engaged scholarship is a form of academic labour that blends intellectual questions and assets with public issues and priorities (Holland, 2005). Put simply, engaged scholarship refers to a commitment to intervening in "the political field" while adhering to scientific norms (Bourdieu, 2003, 2008). It is about translating scientifically generated knowledge into practical use in the public domain. In going beyond the confines of academia, engaged scholarship combines clear methodological orientations, deep theoretical understanding, robust reflexive knowledge, and rich empirical evidence with a strong commitment to causing "the right change" in society.

When it comes to theorising engaged scholarship, two eminent figures stand out: Ernest Boyer and Pierre Bourdieu. In his influential work titled *Scholarship Reconsidered* (1990), Ernest Boyer (former Chancellor of the State University of New York) introduced the concept of the "scholarship of engagement." He argued that the traditional view of scholarship, which focuses solely on research and publishing in academic journals, is too narrow and limiting. Boyer (1996) stressed that true scholarship should entail "stepping back from one's investigation, looking for connections, building bridges between theory and practice, and communicating one's knowledge effectively" (p. 16). In his vision of scholarship of engagement, Boyer (1996) stressed "the academy must become a more vigorous partner in the search for answers to our most pressing social, civic, economic and moral problems, and must affirm its historic commitment" (p. 18). Engaged scholarship aims to raise awareness about tangible problems, empower people experiencing vulnerabilities, and influence policy processes. Scholars committed to causing the right change are "comfortable with a worldview that sees objectivity and activism as linked—to be intellectual and activist is to be knowledgeable, critical, passionate, and caring, all at the same time" (Collins, 2013, p. 260). They embrace advocacy as an instrument for gainful change that benefits those on the margin of society.

In the early 2000s, on the other side of the Atlantic, sociologist Pierre Bourdieu elaborated on why scholars actively engage with the public. Bourdieu (2002, 2003, 2008) described public-facing scholarly engagement as "scholarship with commitment," expressed in scientific knowledge's use to advance truth, freedom, and justice. For him, genuine intellectuals should "break out of the academic microcosm" and breach the "boundary between *scholarship* and *commitment*" (Bourdieu, 2003, p. 24). Breaking out of the academic microcosm involves transcending the confines of scholarly discourse and applying knowledge to combat societal challenges. For Bourdieu (2008), an engaged scholar is one who:

> Intervenes in the world of politics but without thereby becoming a politician, with the competence and authority associated with their membership of the world of science or literature, as well as in the name of the values inscribed in the exercise of their profession. (p. 387)

The "commitment" aspect of Bourdieu's idea of "scholarship with commitment" foregrounds the scholar's dedication to using their expertise to address overlooked but urgent public issues while adhering to values that govern the scientific field where we contend for recognition and distinction, including fairness and the pursuit of truth. Like Boyer, Bourdieu (2003) believed that engaged scholars should take knowledge "beyond the walls of the Scientific City" (p. 13). Bourdieu (2008) also underscored the nuanced distinction between "axiological neutrality" and "scientific objectivity" (Bourdieu, 2008). The tenet of scientific objectivity

underscores an unwavering commitment to impartial and unbiased scrutiny of facts and evidence in the quest for knowledge. In contrast, axiological neutrality confronts the challenge of preserving impartiality concerning values or ethical judgments. Engaged scholars strive to uphold the rigorous standards of scientific objectivity while cognizant of the inherent difficulty in completely extricating values from the research interpretation process. They acknowledge that values inevitably influence the lens through which research questions are framed, methods are selected, data are generated, and findings are interpreted. In other words, positionality matters.

Engaged scholarship is grounded in scientific norms, characterised by methodological rigour, ethical commitment, and theoretical investment. The scholarship of engagement entails intervening in "the political field" while adhering to the "rules that govern the scientific field" (Bourdieu, 2003, p. 24)—it requires a commitment to systemic inquiry, imagination, courage, and moral judgment. The researcher should "respect social reality and not distort it for short-term partisan purposes" (Bello, 2008, p. 88). In analysing and critiquing social reality, the engaged scholar works in line with the rules of scientific investigation and aims to transform undesirable conditions unmasked in the process (Freire, 1993; Harcourt, 2020; Thompson, 2016, 2024).

To put it differently, engaged scholarship recognises the dialogical interplay within theory, evidence, and argument—*tea* (Molla, 2021). In framing research problems and choosing specific methods of inquiry, we start with assumptions about the world around us and what can be known and hold specific rationales for why we engage in the practices (*theory*). Using a specific theoretical lens, we then generate data to answer research questions and understand the world of our inquiry (*evidence*). Finally, we formulate claims supported by evidence (*argument*), ideally proposing alternative possibilities that replace the undesirable status quo. In short, engaged scholarship entails choosing significant problems for research, mastering how to ask good (practical) questions, adopting empowering and participatory methods of inquiry, considering diverse perspectives to answer the questions, and putting the findings in service to pressing societal problems, such as poverty, racism, sexism, and environmental crisis.

Like other forms of advocacy work, engaged scholarship is attentive to overlooked public issues. Universities play a vital role in fulfilling their civic duty by cultivating responsible citizens and involving scholars in collaborative endeavours with the public to generate knowledge that holds significance for both them and society (Glass & Fitzgerald, 2010). Research is not conducted for its own sake but to positively impact society. Beyond documenting the lived experiences of the disadvantaged, engaged scholarship boldly ventures into the realm of questioning social imaginaries, as manifested in public policies, political programs, and collective narratives. Here to be disadvantaged is to lack genuine opportunities to achieve what one has reason to value (Sen, 2009). Scholarly advocacy work is guided by the idea that once sufficiently robust evidence is available, it can be used to advocate for change in policy and practice (Bourdieu, 2003; Burawoy, 2019; Herzog, 2024; Unger, 2024). Activist scholars produce knowledge with social action and its possibilities at the centre of attention. They press for changes in legislation and institutional practices. The aim is to raise awareness about unjust inequalities in society, empower people who live with disadvantages, and influence social imaginaries and policy actions. In essence, the emancipatory intent of engaged scholarship echoes Marx's famous 11th thesis on Feuerbach: "Philosophers have only interpreted the world in various ways; the point is to change it" (Marx, 1845/2000, p. 173). To change the world, engaged scholars must deal with questions of power and privilege mediating access to and success in

education. They do not shy away from being political—they value speaking for and with the disadvantaged. They should raise questions about unjust inequalities in society and envision alternative possibilities.

Engaged scholarship is grounded in participatory epistemology, whereby the research participants collaborate on knowledge generation with a sense of reciprocity, mutual respect, and agency. As a methodological orientation, participatory epistemology underscores the idea that knowledge is not simply transmitted from experts to passive recipients but co-constructed through collaboration and engagement (Fischer & Gottschall, 2006; Irwin, 1995). In other words, politically engaged scholars demonstrate a commitment to respecting the rights of research participants, involving them in decision-making processes, and contributing to their struggles through their research and analysis (Speed, 2008). Engaged scholars are also reflexive. They maintain that, in social inquiry, intellectual disinterestedness is unattainable. What is rather imperative is reflexivity, which involves constant self-awareness and critical reflection on one's positionality and its potential impact on the research. As Speed (2008) put it, "maintaining critical analysis and political pragmatics in tension pushes us to continuously acknowledge and grapple with the contradictions inherent in such a project" (p. 223). Engaged scholars attuned to their biases and perspectives can make more informed decisions about research design, data generation, and analysis. Likewise, critical distance enables them to uncover contradictions and illusions embedded in unjust social arrangements. Engaged scholars engage in a continual cycle of action and reflection—they regularly deliberate on what they do, how they do it, and what the stakes are.

Engaged scholarship combines critical analysis with a clear commitment to research participants. Engaged scholars strive to strike a balance between a scientific commitment to evidence and logic and a political commitment to social justice. They uphold scientific integrity while advocating for the political causes of marginalized groups. It is imperative to note that engaged scholarship is known by different names, including "the scholarship of engagement" (Boyer, 1990), "scholarship with commitment" (Bourdieu, 2003), "public scholarship" (Said, 1996), "activist scholarship" (Hale, 2008), "activist academic" (Cann & Demeulenaere, 2020), "critical performativity" (Alvesson, 2021), and "community-engaged scholarship" (Kajner & Shultz, 2013). Even so, the essence remains the same: engaged scholars ensure their research is relevant, accessible, and beneficial to the broader community.

Prominent examples of engaged scholars who have taken the moral responsibility of engaging with their societies and institutions seriously include (a) engaged public intellectuals, including Noam Chomsky, Frantz Fanon, and Vandana Shiva; (b) Black activist scholars: Angela Davis, bell hooks, and Connell West; (c) Indigenous critical academics such as Aileen Moreton-Robinson, Linda Tuhiwai Smith, and Roxanne Dunbar-Ortiz; and (d) diaspora engaged scholars: Edward Said, Ngugi wa Thiong'o, and Stuart Hall. The common thread that ties the works of these and other engaged scholars is the need and urgency to expose generative mechanisms of unjust inequalities and help engender fresh understandings of complex practical questions. As Edward Said put it, a true intellectual is one who (a) considers him/herself as "a thinking and concerned member of a society" that raises moral issues and (b) is strategically prepared and ethically committed to speaking truth to power, which entails "carefully weighing the alternatives, picking the right one, and then intelligently representing it where it can *do the most good and cause the right change*" (Said, 1996, pp. 82, 102, emphasis added). In essence, the engaged scholar becomes a catalyst, bridging the realms of academia and advocacy. Instead of pursuing knowledge for its own sake, the engaged scholar uses research to contribute to conditions that nurture a more just and equitable society. They tie intellectual work with civic responsibility. They use their academic expertise to support community action.

But why do scholars *positively* engage with the public? What are the driving forces of engaged scholarship? The pursuit of public-facing academic work is a deliberate effort to bridge the gap between ivory tower discussions and the lived experiences of individuals and communities. It is an acknowledgment that the relevance and impact of our scholarly activities depend on our ability to connect with the broader public. But why do we do engaged scholarship? What do we seek to achieve through public-facing academic work? This section of the article aims to answer these questions. Drawing on my experiences and the literature, elsewhere, I named six conditions that make engaged scholarship possible (Molla, 2024a): crisis and uncertainty, evidence of urgency, role expectations, researcher positionality, ethical considerations, and theoretical commitments.

Crisis is marked by a sense of anxiety, instability, uncertainty, and rupture—it represents "dramatic ruptures into the normal course of things that…call for urgent solution" (Fassin, 2021, p. 265). Crisis erodes confidence in the status quo, resulting in the urgency to return to regularity, making drastic reforms possible, and making difficult decisions acceptable. To use Friedman's (1962/2002) framing, when a crisis hits a system or society, "the politically impossible becomes politically inevitable," and those who wait in the wings with well-formulated alternatives are more likely to succeed in offering a way out (p. ix). For instance, the economic upheavals of the 1970s prompted a shift towards neoliberal policies, demonstrating how crises can pave the way for transformative ideas. Evidence of urgency can also open opportunities for engagement and generate public will and policy response. When our research reveals pressing issues that demand immediate attention, we are more likely to seek ways to address the identified problem. Translating research into practical solutions becomes a natural progression when urgency is at the forefront of scholarly endeavours. For instance, the findings of my studies showed that refugees remained invisible in Australia's higher education equity policy space (Molla, 2023; Molla & Gale, 2023). The exclusion of refugees as equity targets means that intersectional factors of disadvantage associated with the life-course trajectories of the group are discounted.

Ethical research is not extractive; it does not extract data and runs away with little or no commitment to the voices and benefits of the participants (hooks, 1990, p. 343). It uses the stories of the participants to generate benefits for them. Engaged scholarship rests on a commitment to reciprocity where benefits and knowledge flow both ways between academia and the community (Śliwa & Kellard, 2021). For instance, Australia's National Statement on Ethical Conduct in Human Research underlines the importance of ensuring *distributive* and *procedural justice* in human research: "While benefit to humankind is an important result of research, it also matters that benefits of research are achieved through just means, are distributed fairly, and involve no unjust burdens" (National Health and Medical Research Council, 2018, p. 9).

Relatedly, the positionality of the scholar can be an enabler. The urge to engage may stem from one's political commitment or, more fundamentally, from one's sense of existential significance. A scholar's positionality represents their sense of location within networks of relationships (e.g., gender, class, race, age, religion, nationality, immigration status, and sexuality, as well as political persuasions, life-course trajectories, and theoretical orientations) and the worldviews and assumptions resulting from such networks and relations. As Ward and Miller (2016) noted, "the propensity for community-engaged scholarship is grounded heavily in one's identity, the context in which we live and work, and our subsequent connections to communities, people, and place" (p. 191). The commitment to engaging with the public might even get stronger when scholars identify with those on the margins of society. Being subject to a common destiny or confronting the same adversary deepens the scholar's solidarity with those on the margins of society.

My attempt at engaged scholarship attests to this reality. I am an African heritage scholar in a predominantly White settler society. I am also a father of two children attending racially diverse public schools. My positionality offers me a unique vantage point that shapes my perspective on the causes and consequences of educational disadvantage, the responsibility of society in tackling unjust inequalities, and my role in drawing attention to this pressing issue.

Public-facing engagement can be a result of role expectations. For example, the Australian Research Council (ARC, 2022) expects researchers to engage with knowledge end-users and demonstrate tangible contributions to the economy, society, culture, and public policy. Engaged scholars play a pivotal role in giving substance to the social contract of public universities, actively contributing to realising the university's broader social purpose. The fundamental pillars of teaching, knowledge production, and community engagement lie at the heart of the university's mission. Although universities continue to navigate evolving roles in the face of fast-paced technological and societal changes, they are expected to uphold their "dual role as both society's *servant* and society's *critic*" (Shapiro, 2005, p. 15, emphasis added). In this respect, the role of researchers extends beyond scholarly pursuits, necessitating a proactive engagement with non-academic audiences.

Finally, the theoretical commitments of the scholars are equally important. For instance, critical theoretical orientation is widely viewed as an enabler of engaged scholarship. Critical theory assumes that existing relations and power dynamics are not "givens to be verified" but social constructions that reflect the interests of powerful members of society (Horkheimer, 1972, p. 244). Critical theory is transformative in intent. It maintains that when actively applied and shared, knowledge has the power to shape and enhance our collective ways of acting in the world. Viewed through the lens of critical theory, engaged scholarship does not aim to reveal universal truths. Instead, it focuses on addressing specific conditions that significantly impact individuals' lives. Ultimately, scholars' theoretical orientations shape but do not dictate their engagement with the public, leaving room for creativity, reflexivity, and ongoing dialogue in the pursuit of meaningful public scholarship.

In underscoring the evolving role of scholars as both knowledge creators and active participants in addressing complex societal issues, Eatman (2012) declared: "The arc of the academic career bends toward publicly engaged scholarship" (p. 25). However, it is imperative to note that not everyone values public engagement (see Figure 1). Many scholars advocate for *non-engagement*. In *Save the World on Your Own Time*, Stanley Fish famously argued that the primary responsibility of academics is to focus on their core duties of teaching and research, rather than seeking to change the world through activism or political engagement. Fish (2008) contended that higher education's role is purely academic, centred on imparting knowledge and fostering critical thinking, rather than becoming a platform for social or political transformation. He advocated for academics to keep activism outside the university and focus on scholarly pursuits, ensuring a clear separation between personal ethics and professional responsibilities. Similarly, in *Let's Be Reasonable*, Marks (2021) argued that universities should promote intellectual inquiry and reason, rather than serving as vehicles for political change or social justice movements. Other scholars, including Wells (2018), Macfarlane (2012), and Ellis (2020), echoed Fish's stance, maintaining that academia should remain focused on scholarship and refrain from advancing ideological agendas.

A critical observer would argue that the reluctance of some scholars to engage with social or political issues may be less about an inherent commitment to neutrality and more about the ways they have been shaped

by their particular social contexts. In other words, a commitment to non-engagement may in part reflect the socialisation of the scholars. According to Bourdieu (2000):

> Those who like to believe in the miracle of "pure" thought must bring themselves to accept that the love of truth or virtue, like any other kind of disposition, necessarily owes something to the conditions in which it was formed, in other words, a social position and trajectory. (p. 3)

In this respect, the idea of being a detached scholar committed to "pure" academic work could be viewed as a marker of social position and a means to conserve the status quo. While the notion of detached scholarship may appear to uphold values of objectivity and rigour, it can be critiqued for ignoring the social responsibilities of intellectuals, limiting diverse perspectives, and missing opportunities to use academic knowledge for the public good.

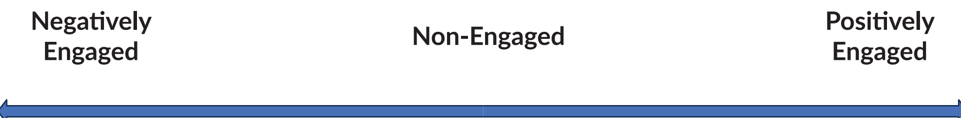

Figure 1. Continuum of scholarly engagement.

Even more concerning, not all engaged scholars have consistently aligned themselves with the principles of justice, human dignity, freedom, and solidarity. Throughout history, we found *negatively engaged* scholars who sided with those in power, actively contributing to the perpetuation of injustice, suffering, and oppression. For instance, in the 17th and 18th centuries, leading intellectuals in the West not only justified but also profited from the institution of slavery (Jordan, 2012), and prominent champions of the Enlightenment played significant roles in promoting racism (Molla, 2024b). Many German intellectuals supported the Nazi genocidal agenda by promoting pseudo-scientific theories (such as eugenics and racial hierarchies, which legitimised the persecution and extermination of Jews and other minorities in Europe) and helped to shape policies that facilitated the Holocaust (Goldhagen, 1996). As historian Omer Bartov aptly observed:

> To legitimize themselves in a modern world, antisemitism, Nazism, and genocide all needed two crucial elements: *a scientific stamp* and *a legalistic sanction*. Antisemitism could not have achieved the support of both the masses and the elite, the mob and the school teachers, without being made part of an elaborate racial theory allegedly tested and proven by the most prominent authorities in the fields of human sciences. [It] was the scientists who gave an academic garb to racism or, rather, invented scientific racism as a modern version of pure and simple prejudice and fear of the other. [T]he Holocaust, the systematic "extermination" of human beings would have been unthinkable without the medical profession's "detached" evaluation of these human beings as not only inferior and therefore unworthy of life, but as positively dangerous to the national Aryan body and therefore doomed to quick and efficient, yet of course wholly unemotional, elimination. The same can be said about the legal profession....[M]odern antisemitism would be inconceivable without the collaboration, indeed the active participation, of the legal system....Thus, while the doctors sanctioned murder, the lawyers legalized crime. It is a legacy with far-reaching consequences. (Bartov, 1996, p.68, emphasis added)

On the eve of the Second World War, some European scholars also openly supported the Fascist invasion of Ethiopia, offering ideological justification for colonial aggression (Simon, 2009). Western scholars, writers, and artists have also been complicit in constructing and perpetuating harmful stereotypes about the Middle East and North Africa, as Edward Said famously argued in *Orientalism* (Said, 1978). Even today, some scholars lend their expertise to right-wing populist movements, using their knowledge to reinforce exclusionary and divisive ideologies (Tismaneanu & Iacob, 2019). Further, Naomi Oreskes and Erik Conway in *Merchants of Doubt* demonstrated how influential scientists, often linked to conservative think tanks and industries like tobacco or fossil fuels, failed to fully inform the public about major threats such as tobacco smoke, acid rain, and climate change (Oreskes & Conway, 2010). Rather than challenging the status quo, they cast doubt on scientific consensus to obstruct regulatory actions, which underscores the consequences of disengagement. This pattern of intellectual complicity with power underscores the complex and often problematic relationship between scholarship and social justice.

3. Pitfalls of Engaged Scholarship

Engaged scholarship has the potential to cultivate deeper relationships between scholars and communities, enrich teaching and learning experiences, and drive meaningful social change—but it also encounters significant challenges (Diener & Liese, 2009). There is a tension between the desire to bridge the gap between research and community needs and the institutional constraints, professional norms, and personal motivations that complicate this effort. The term "discontents" in the title of this article acknowledges the frustrations, conflicts, and ethical dilemmas that can arise in the pursuit of engaged scholarship. Scholars navigate a landscape rife with contradictions—where the desire for meaningful impact clashes with institutional policies, funding priorities, and disciplinary norms that may undermine their engagement efforts. The rise of polarization and scepticism towards expertise further complicates the legitimacy and impact of scholarly engagement, challenging public trust in academic institutions.

In other words, engaged scholarship is risky (Cottom, 2012). Making efforts to place one's research in service to social change comes with challenges. For instance, the conventional metrics of scholarly success often prioritise traditional forms of academic output, such as peer-reviewed publications and grant income. In a climate where divergent and polarised views on truth and knowledge constitution prevail within and outside academia, engaged scholarship is also marked by the challenge of earning trust. Further, the very act of challenging existing power structures and advocating for social change may attract resistance and hostility. As such, engaged scholars often face the potential exposure to backlash from antagonistic forces within the public sphere. In short, the challenges of engaged scholarship are intricately woven into the fabric of securing legitimacy in a university system where what counts as scholarship is narrowly conceived, increased anti-intellectualism in society, the risk of burnout, and weathering potential backlash from those resistant to change. This section briefly discusses each of these points.

3.1. Academic Narrowness

Nicolas Kristof opens his widely cited 2014 *New York Times* piece with this line: "Some of the smartest thinkers on problems at home and around the world are university professors, but most of them just don't matter in today's great debates" (para. 1). He argues that the academy tends to:

> [Foster] a culture that glorifies arcane unintelligibility while disdaining impact and audience. This culture of exclusivity is then transmitted to the next generation through the publish-or-perish tenure process. Rebels are too often crushed or driven away. (Kristof, 2014, para. 6)

Academic narrowness can inhibit public engagement. What counts as useful and usable knowledge by our universities influences what we do as researchers. In the context of marketized higher education systems, the value placed on public-facing engagement is minimal and uncertain. Universities and funding bodies urge us to account for impact and engagement in our research (e.g., ARC, 2022). The persistent call for "impact and engagement" notwithstanding, in many cases, the system does not properly account for or value public engagement. The existing reward structure of the academic research enterprise elevates citation counts and other related metrics. To what extent do promotion committees in universities acknowledge the value of engaged scholarship? Do our academic peers and funding agencies recognise the importance of scholarly advocacy work?

Within academia, there is a long-standing positivist tendency to separate knowledge from action, theory from practice, and the researcher from the practitioner. Positivism hides the connections between knowledge and authority; under the pretence of impartial objectivity, it enforces the beliefs, values, attitudes, and cultural influence of those in power (Molla, 2021). It denies the theoretical assumptions that inform claims of truth (portraying truth as simply an assortment of isolated facts) and decouples knowledge from the conditions of its production (Saltman, 2022). The dominance of positivism as a mode of knowledge production and the intensification of datafication means rich qualitative accounts of the lived experiences of the disadvantaged are likely to be further marginalised or ignored. Engaged scholarship deviates from the positivist norm of maintaining distance and neutrality and challenges the "hierarchy of knowledge."

Scholarly agency is a function of organisational environments. There will be no effective and sustainable engaged scholarship without an engaged university. As sociologist Raewyn Connell noted, a good university is a responsive and responsible university that is "fully present for the society" that supports it (Connell, 2019). A good university is not simply an economic machinery; instead, it produces socially relevant knowledge and engages with urgent matters (e.g., environmental and humanitarian crises) and complex issues such as injustice, racism, domination, and exploitation. In this respect, it seems that nowadays, the university is primarily tasked to produce knowledge that is of economic value. There is a broad consensus that, with the consolidation of the neoliberal university, the academic role has been narrowed in favour of economic goals. Restrictive audit culture diverts scholars' attention from meaningful, community-oriented research towards activities that yield quantifiable outcomes (Shore & Wright, 2024). The emphasis on quantifiable metrics—such as publication counts, citation rates, and grant acquisition—to assess academic performance undermines community-oriented research. Scholars are increasingly disengaged from important public issues of their time. Those who resist engaging directly with the public may see their contributions merely as critical intellectual discourses. Bourdieu (2003) refers to this narrow framing of engaged scholarship as "campus radicalism," an academic propensity that confuses "revolutions in the order of words or texts for revolutions in the order of things, verbal sparring at conferences for 'interventions' in the affairs of the *polis* [public life]" (pp. 19–20).

The issue of academic narrowness is also closely linked to hierarchical knowledge systems dominated by Western perspectives that marginalise alternative epistemologies (Connell, 2020; de Sousa Santos, 2015,

2018; Spivak, 1988, 1999). In *Southern Theory*, Connell (2020) underscored that much of the prevailing academic discourse is shaped by Western perspectives that often overlook or marginalise the experiences and knowledge of those in the Global South. Likewise, using such concepts as "epistemicide" and "cognitive empire," de Sousa Santos (2015, 2018) problematised how Western modernity has devalued various ways of knowing as non-scientific, particularly those from colonised peoples. Similarly, Spivak (1988, 1999) contended that dominant narratives frequently obscure the voices and experiences of marginalised groups, especially in postcolonial contexts. She asserts that the subaltern—those outside hegemonic power structures—struggle to articulate their realities within dominant discourses, which often misrepresent them. When hierarchical knowledge systems dominate, disadvantaged groups often struggle to fully articulate their lived experiences—they are affected by what Fricker (2007) refers to as "hermeneutical injustice." When the dominant epistemic system fails to acknowledge the knowledge of marginalised groups, it perpetuates the cycle of invisibility and disenfranchisement.

Engaged scholarship has the potential to rectify epistemic injustice (Fricker, 2007; Serman & Goguen, 2019) by fostering inclusive knowledge production that values diverse epistemologies. To this end, engaged scholars must acknowledge the inherent power relations within knowledge systems, actively listen to those on society's margins, and take responsibility for amplifying the diverse ways of knowing that have historically been silenced.

The commodification of knowledge within contemporary universities presents significant challenges for public-facing engagement. The neoliberal university expects scholars to carry out most of their advocacy efforts during their personal time. Engaged scholarship often faces a pervasive undervaluation within university management circles, often relegated to the status of an extraneous or peripheral pursuit (Peterson, 2009). The intrinsic worth and impact of engaged scholarship, which integrates academic pursuits with real-world applications, are unfortunately not accorded the recognition they deserve within the administrative framework of many educational institutions. This undervaluation may stem from a narrow perspective prioritising traditional academic metrics such as research publications and grant funding over the broader societal contributions that engaged scholarship can generate. This constitutes a systematic suppression of an activist mode of knowledge production and application. In a way, we face what Burawoy (2019) refers to as "the paradox of public engagement—the simultaneous claim of its impossibility and its necessity" (p. 27). Anna Bartel and Debra Castillo open their edited collection, *The Scholar as Human*, with the following insightful observation:

> There are two great and immiscible tides affecting faculty life in the early twenty-first century: *publicness* and *specialization*. The publicness tide would sweep faculty work toward ever-greater public engagement and purpose, while the forces of academic specialization drive faculty toward more rarefied, often particularized, often short-lived, and "productivity"-oriented ways of knowing and doing. (Bartel & Castillo, 2021, p. 1, emphasis added)

There exists a dialogical interplay between institutional support and impactful public engagement. Engaged scholars draw on their academic achievements to earn symbolic capital outside academia. That is to say, for scholars to productively engage with communities, they need to have recognition and legitimacy within the academic field. With the right volume of symbolic capital, engaged scholars authoritatively call for attention in the public space (Molla, 2019). Some view academic specialisations as "the royal road to

efficiency in intellectual as in economic life" (Stigler, 1984, p. 12). For others, the increased focus on specialisation encourages academics to concentrate on more niche, often highly specific, short-lived, and productivity-focused approaches to knowledge and practice (Bartel & Castillo, 2021). When scholarship is narrowly conceived within the university system, engaged scholars will likely have diminished symbolic capital (signified by a lack of respect and recognition for their work) within their field of practice. Their public engagement may not fit with promotion and other forms of performance audits. For example, writing about the Canadian context, Changfoot et al. (2020) reflected on how engaged scholars face challenges in meeting demands for tenure and promotion. The impact is cyclical. Without promotion and recognition, scholars might struggle to engage with the public impactfully. In addition, given the precarity of academic employment, not all scholars can afford to engage in activities that do not directly contribute to their career prospects.

3.2. Anti-Intellectualism

We live in an era where expertise is increasingly questioned or even attacked, and opinion is often valued more than knowledge. With the rise of identity politics, authoritarian tendencies, and the pervasiveness of social media, the post-truth denial of facts complicates the work of the engaged scholar (Giroux & DiMaggio, 2024; Thompson & Smulewicz-Zucker, 2018). Anti-intellectualism refers to the increasing mistrust toward expertise in society (Herzog, 2024; Nichols, 2024). The expansion of higher education, rapid technological advancements, open access to the internet, and widespread social media use have given people unprecedented access to information. These societal gains, however, have eroded trust in experts and crippled informed public debates. As Nichols (2024) observed, the democratic spread of information has paradoxically brought about a wave of misinformed, resentful citizens who disparage expert knowledge and intellectual achievement. Polarised views about the constitution of knowledge and truth make the task of engaged scholars difficult. In this post-truth paradigm, objective facts and empirical evidence influence public opinion and policy decisions less than appeals to emotion, personal beliefs, and subjective narratives (Fischer, 2021). For those who live in a post-truth reality, opinion is received as legitimate, and emotional considerations trump factual presentations.

Critical theorist Wendy Brown characterised the public devaluation of knowledge and scholarly work as a form of nihilism that has shaken the foundations of science and progress (as exemplified by champions of "alternative facts," flat earthers, climate change sceptics, and anti-vaccine campaigners; Brown, 2023). As the politics of disinformation deepens, there is an increasing tendency for people to claim to be entitled to their facts. Widespread scepticism toward expert knowledge might result in a crisis of credibility that diminishes the impact of engaged scholarship. Of course, the trend should worry all of us, but more so to those interested in influencing public opinion through our research. In what has come to be known as the post-truth political space, emotional or ideological appeals often trump evidence-based reasoning. As Saltman (2022) observed:

> Growing inequality, precarity, and crises of agency have caused many people to succumb to the assurance of certainty offered by fundamentalisms and authoritarianism. Fundamentalist religion and market fundamentalism provide false guarantees of certainty grounded in dogma. Authoritarian leaders promise false security in exchange for an abdication of liberty. Around the world, Strongmen mystify the causes of inequality; scapegoat the vulnerable; attack science, education, and truth; and offer themselves up as identifications with strength. (p.viii)

In some corners, the outright opposition to scholarly advocacy work is not related to questions of ‘epistemic authority’ (Zagzebski, 2012). Instead, the scepticism stems from the argument that valuable knowledge should not be used to call for action (Wells, 2018). For example, Wells (2018) argues: “Academics who believe that their ideas should rule society merely because they are true have misunderstood the division of labour in a democracy” (para. 13). For him, engaged scholarship is nothing but “people demanding attention for their opinions, rather than an independent truth machine that serves democratic deliberation” (para. 15). Obviously, I utterly disagree with Wells’ position. Scholars should not refrain from engaging in the public sphere and using their expertise to contribute to positive social changes. Their role in building consensus based on knowledge is critical. A world that lacks a shared reality is doomed to fragmentation and chaos. Without a commitment to truth, society becomes fractured and polarized, undermining the very foundations of communal life. Demiryol (2023) articulates the dangers of anti-intellectualism and the need to tackle it as follows:

> The attack on reality in our contemporary world is an attack on our political community….When we lose this common world, we are fractured, divided, polarized—not a community anymore. Indeed, the truth cannot save us, but without truth, we cannot be saved. The common world upon which we can rebuild our trust in our political institutions, science and experts, our democracy, and even each other depends on truth. We need to safeguard it. (p. 122)

To reiterate, within academia, there is a long-standing positivist tendency to separate knowledge from action, theory from practice, the researcher from the practitioner. Outside academia, there has been widespread cynicism about what counts as truth (the so-called post-truth positioning). My position is that, despite increasing societal distrust, we should not refrain from the critical work of informed advocacy. Our claims and strategies may not be perfect—no scientific endeavour is perfect or complete. What matters is that the claims and strategies draw on sound methodological, theoretical, and empirical grounds. Further, in making informed claims, we should be reflexive about our assumptions, goals, social locations, and the privilege associated with our positionality.

3.3. Professional Rules and Academic Norms

Professional rules and ethical guidelines often play a significant role in shaping scholars’ engagement with public affairs. While these regulations aim to maintain professional integrity and objectivity, they can inadvertently create barriers that hinder academics from participating in critical discussions that affect society. Take the case of the American Psychological Association’s (APA) Goldwater rule, which exemplifies how professional guidelines can inhibit timely interventions and discussions that may be crucial for public understanding. Section 7.3 of the *Principles of Medical Ethics with Annotations Especially Applicable to Psychiatry* (American Psychiatric Association, 1973/2013) reads:

> It is unethical for a psychiatrist to offer a professional opinion unless he or she has conducted an examination and has been granted proper authorization for such a statement.

This restriction exemplifies the tension between maintaining professional ethics and fulfilling a civic responsibility to inform the public about, for instance, potential risks associated with leadership styles that may have detrimental mental health consequences. The reluctance to engage publicly, even when pressing issues are at stake, demonstrates how professional rules can limit the scope of scholarship and its impact on

societal matters. Following Donald J. Trump's first ascent to the presidency in 2016, there was a surge of interest in assessing his mental capacity and state. However, many psychologists and psychiatrists were constrained by professional ethics, which prohibited them from diagnosing individuals they had not personally evaluated (American Psychiatric Association, 1973/2013). As a result, a significant number of these professionals refrained from commenting on Trump's mental health.

Even so, in the case of Trump, few scholars dared to break the rule. For example, over 30 scholars and mental health experts prioritised their "duty to warn" over the principle of professional neutrality, collectively issuing a warning about the president's "unnatural state" (Lee, 2019). Their assessment was published in the book *The Dangerous Case of Donald Trump* (first published in 2017 and updated in 2019 by Lee). The experts outline how Trump exhibits traits that could be harmful to democracy, such as narcissism, impulsivity, and lack of empathy, and raise concerns about his mental fitness for the role of President of the United States (their warning appears to have gone unheeded as Americans have just re-elected Trump as their leader).

Further, academic norms of neutrality often inhibit engaged scholarship by discouraging scholars from taking a position on contentious issues. These norms are based on the belief that scientific objectivity requires value neutrality, leading scholars to withhold their perspectives even in areas where their expertise could have a significant impact (Colombo, 2023; Pielke, 2007). For many researchers, particularly those in the natural sciences, adhering to this expectation of neutrality can result in a reluctance to engage in public debates, due to concerns that doing so might compromise their credibility or be seen as biasing their research. While upholding scientific integrity is undoubtedly important, the expectation of neutrality can prevent scholars from contributing to crucial public debates, especially those requiring urgent responses, such as the climate crisis, growing inequality, misinformation, and unfreedoms. As I argued elsewhere (Molla, 2024a), socially relevant knowledge cannot be axiologically neutral—knowledge aimed at contributing to the public good is inherently value-laden.

Professional rules, such as the Goldwater rule, can significantly constrain scholars from engaging with the public. While professional rules aim to uphold ethical standards and prevent unfounded diagnoses, they can inadvertently restrict experts from contributing their insights on pressing societal issues. Scholars may feel compelled to remain silent on critical matters, fearing professional repercussions or a breach of ethical conduct, thus limiting their ability to inform public discourse (Colombo, 2023; Lee, 2019). The consequences of such restrictions can be particularly pronounced in areas of significant public concern, such as climate change. When experts refrain from sharing their knowledge and perspectives, the public is left without essential insights that could help contextualise complex issues. Without scholars actively engaging in these debates, there is a risk that public policy may be shaped by less informed voices that sustain unjust socioeconomic arrangements and repressive political orders.

3.4. Backlash

Intellectual work entails "passionate engagement, risk, exposure, commitment to principles, vulnerability in debating and being involved in worldly causes" (Said, 1996, p. 109). Engaged scholars see it as their responsibility to speak the truth to power; they use their privilege to unmask structures of injustice and call for changes that benefit the disadvantaged in society. They are courageous. Roberts and Wood (2007) define intellectual courage as "an ability to perform intellectual tasks well despite what one takes to be

significant threats" (p. 76). In other words, intervening in the "political field" can expose scholars to backlash from hostile forces on the broader public. For Bourdieu (2008), "scholarship with commitment" is likely to trigger a backlash from within and outside academia:

> To intervene in the public space means exposing oneself to *disappointment*, or worse, *shocking* those in one's own world who, choosing the virtuous facility of retreat into their ivory tower, see such commitment as a lack of the famous "axiological neutrality" that they wrongly identify with scientific objectivity, and in the world of politics, all those who see such intervention as a threat to their monopoly, and more generally, all those whose interests are threatened by disinterested intervention. (Bourdieu, 2008, p. 386, emphasis added)

The pushback may arise from individuals, organizations, or institutions that resist engaged scholars' research, advocacy, or social justice efforts. The threats to intellectual courage range from loss of job, friends, and reputation to bodily harm and persecution. Depending on the context of engagement and the issues they advocate for, scholar-activists may have to endure character assassination and even physical intimidation. For instance, as documented by Chomsky (2017), scholars such as Bertrand Russell, Randolph Bourne, Thorstein Veblen, and Eugene Debs were punished for opposing their respective governments' military aggression. Scholars in politically repressive contexts have limited or no right to freedom of advocacy—a pointed critique aimed at those in power may lead to overt political retaliation.

To echo Bourdieu (2000, 2008), the pitfalls of engaged scholarship partly arise from the tensions between the scholarly field and the political field, which operate under different logics of practice. In academia, peer critique is expected to be measured, reasoned, and constructive, governed by norms of intellectual rigour, transparency, and mutual respect. Scholars engage with one another through disciplined debate, valuing evidence and thoughtful critique. However, the political field operates differently. Public debates are often shaped by the need to assert dominance, win arguments, or push ideological agendas, leading to more hostile and contentious exchanges. There is little room for nuanced discussion, and dissenting voices are often met with aggression, undermining efforts to foster mutual understanding. This hostile environment poses challenges for engaged scholars. While they are accustomed to reasoned critique within academia, engaging in public debates can expose them to personal attacks and threats, which stifle open discourse. A stark example of this occurred following Hamas's attack in 2024 and Israel's military response in Gaza. Many scholars who called for a ceasefire or criticised the Israeli government's genocidal actions were swiftly accused of antisemitism. The public sphere allowed little space for balanced critique, suppressing dissenting voices and confining individuals to a suffocating silence.

Unsurprisingly, those unsettled by the questions or proposed solutions of engaged scholars are likely to resist and push back. Even in liberal democratic societies such as Australia, it is not easy to engage in scholarly advocacy. I learned this the hard way. In the last few years, as I tried to engage with the public, I faced backlash from different directions. In 2019, based on the preliminary findings of my research, I wrote a piece for *The Conversation*. The core message of the article was that poor educational outcomes of African heritage refugee-background students could be attributable to their traumatic life course and racial stigma at school. The reaction shocked me. I faced racist backlash. I was criticised for being ungrateful and not appreciating how people squander their opportunities. In rejecting the pervasiveness of racism as a problem, many readers reacted in a racist way. The hostile responses may imply that doing racism is more acceptable than discussing it as a social ill.

When I emphasized the importance of African youth taking vocational training opportunities seriously, I was accused of holding deficit views toward the group. Striking a balance without upsetting either side is challenging. This tension underscores the difficulty of addressing complex social issues in a nuanced way that acknowledges both systemic barriers and individual agency. However, I firmly believe that engaged scholarship is too crucial to ignore. Denial allows individuals to evade responsibility and perpetuates existing problems; this must be actively challenged. Importantly, there should be no moral barrier preventing newcomers from critiquing the host society. Immigrants, like myself, should not shy away from offering constructive criticism to ensure that society strives to fulfil its ideals of justice, dignity, and freedom.

3.5. Burnout

A commitment to being a force for good often carries a high price: the risk of emotional burnout and lethargy. In the absence of supportive environments that enable engaged scholars to achieve their goals, exhaustion and disconnection become inevitable (Han, 2015; Pines, 1994). Engaged scholars may encounter burnout or fatigue due to the emotional and time-intensive nature of their work. Balancing the demands of academic responsibilities with ongoing community engagement requires intentional self-care strategies and institutional support to ensure the sustainability of the scholar's commitment to societal impact. Addressing these pitfalls requires ongoing reflection, adaptability, and a commitment to ethical and equitable practices in engaged scholarship.

Public-facing engagement may also expose scholars to professional isolation, institutional constraints, and rigid disciplinary boundaries (Young et al., 2010). We can shield ourselves from backlash, burnout, and isolation by building alliances, seeking support from like-minded colleagues, and capitalising on other sources of resilience in the face of adversity. Constant exposure to the realities of societal inequities and injustices can take a significant toll on their well-being. Witnessing or experiencing the suffering of marginalized communities can lead to feelings of sadness, anger, frustration, and even helplessness (Van der Kolk, 2015). Moreover, engaging in activism and advocacy requires continual emotional investment as scholars navigate complex power dynamics, confront systemic oppression, and strive to amplify the voices of those marginalized by society (Young et al., 2010). This emotional labour can lead to burnout, fatigue, and compassion fatigue, where scholars may find themselves emotionally drained and struggling to maintain their motivation and effectiveness in their work.

Institutional constraints also pose significant challenges for engaged scholars. Academic institutions are often governed by rigid structures and norms that prioritize academic rigour and scholarly output within narrowly defined disciplinary boundaries. This can create barriers for scholars seeking to integrate activism and advocacy into their research and teaching. Institutional policies, such as tenure and promotion criteria, may not adequately recognize or reward engaged scholarship, leading to concerns about career advancement and job security. Moreover, limited resources and funding opportunities for research that addresses social injustices can impede the ability of scholars to pursue their advocacy work effectively. These institutional constraints can create frustrations and dilemmas for engaged scholars, forcing them to navigate a complex landscape where their commitment to social change may conflict with the expectations and requirements of academia. Additionally, the advocacy work undertaken by engaged scholars may challenge the status quo and face resistance from colleagues or institutional leadership who are hesitant to disrupt established norms or power structures (Cann & Demeulenaere, 2020; Collins, 2013). This can further

exacerbate feelings of isolation and make it difficult for scholars to find allies and collaborators who share their commitment to social change.

In her insightful essay on ethical considerations in refugee research, Lynn Gillan asks: “Is there an ethical imperative to act on the findings of refugee and asylum seeker research (in particular ways)?” (Gillan, 2013, p. 23). In my research, I take advocacy as a key element of ethical expectations of critical research. My research did not aim just to understand issues or circumstances. It had a practical purpose. Some members of the public who critiqued my engagement were quick to remind me that I am an immigrant who should be grateful for the opportunities I have. I wonder if there should be moral impediments that prevent immigrants like myself from criticizing the host society in order to help it live up to its own ideals of equality and freedom.

Before closing this section of the article, I would like to make a couple of more points. Firstly, engaged scholarship involves addressing complex social issues and communicating findings to various audiences, including policymakers and the public. Balancing nuance and simplification is crucial for ensuring that the research is both accurate and accessible. But striking the right balance between preserving the nuance and depth of scholarly content while presenting it in a simplified manner can be challenging. Translating complex scholarship without diluting its richness requires skills and practice. Secondly, the inherently political and contentious nature of engagement means that it will be messy. Engaged scholars should not anticipate full control over how their work is construed, as its interpretation may be altered, whether with or without their agreement. The complexity of measuring and assessing impact poses a third challenge. Engaged scholarship aims for tangible outcomes and positive societal change, but the metrics for success can be elusive and context-dependent. Scholars may encounter difficulties quantifying their work’s impact, leading to challenges in securing funding, institutional support, and broader recognition. Finally, public discourse operates under distinct rules compared to academic discussions, introducing unfamiliar tactics and participants for those who opt to engage (Hoffman, 2021). Hence, those entering this realm should be ready to navigate the intricacies of public debate, acknowledging the potential for distortion and the unique dynamics at play.

4. Concluding Remarks

Engaged scholarship involves adhering to scholarly standards while actively participating in the public sphere to create beneficial changes for marginalized communities. The core position is that once sufficiently robust evidence is available about an issue, it can be utilised to advocate for change by raising public awareness, empowering people experiencing vulnerabilities, and influencing policy processes. For instance, when our research on educational disadvantage generates fresh knowledge about persisting inequalities and policy silence, we may not have an ethical alternative to becoming engaged. Our research should create conditions for the disadvantaged to interpret and comprehend the broader structures producing injustice and precarity.

But what makes engaged scholarship possible? What are the drawbacks of public-facing scholarly engagement? These questions inspired the present article. It names the possibilities and pitfalls of engaged scholarship. Whether and the extent to which scholars engage with the public depends on various factors, including responsiveness to crisis, evidence of urgency, positional alignment, institutional expectations, ethical considerations, and critical theoretical orientations. However, public engagement comes with its challenges. Academic narrowness, anti-intellectual tendencies, potential backlash, and the risk of emotional

burnout present significant obstacles to effective and sustained engagement. As bastions of independent thought and critical inquiry, universities frequently emphasise the value of connecting scholarly work with broader societal issues and fostering partnerships with industry and community; the actual evaluation processes for tenure and promotion tend to prioritize traditional metrics of academic success, such as peer-reviewed publications, grant acquisition, and citations. Achievements in public scholarship and community engagement often receive insufficient recognition. Likewise, academics are privileged to have a voice protected by enterprise agreements, academic regulations, ethical codes of conduct, and University Acts. However, criticizing the powerful in society still carries risks.

To thrive in the face of obstacles, as Professor Stewart Riddle aptly advises, we should find what sustains us. From my experience, immersing ourselves in what we love doing can be helpful (Riddle, 2017). By absorbing ourselves in what resonates with our core values and aspirations, we can fortify our commitment to the cause we are passionate about. Equally important, we should not be afraid of failure. As the saying goes, anything worth doing is worth doing poorly at first. Locating a supportive ecosystem that shields us from undue distractions is another way of sustenance. Supportive environments could encompass a network of colleagues and mentors who share our passions and offer encouragement. In essence, finding what sustains us is not just a response to adversity but a strategic approach to cultivating a resilient anchor and flourishing in the face of difficulties.

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ARTICLE

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Collective Identity and Care Ethics: Insights From Chilean Migrant Solidarity Initiatives

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Abstract

Based on ten months of ethnographic fieldwork conducted with more than twelve migrant organizations in Chile, this article examines how mutual support groups establish and maintain networks of care that their members view as moral imperatives. These organizations develop sophisticated citizenship narratives while emphasizing the importance of nurturing both their collective ethos and solidarity initiatives. Through analyzing how members interpret their collaborative care and solidarity efforts, this article reveals how care practices generate a distinctive form of sociability that departs from traditional Chilean solidarity frameworks. This emergent sociability manifests as an ethical project that challenges prevailing paradigms and expands our understanding of citizenship dynamics within migrant communities. The research contributes to anthropological perspectives by illuminating the intricate relationships between care practices, collective identity formation, and human interaction within migrant support networks.

Keywords

care; Chile; citizenship; migration; solidarity

1. Introduction

In an era marked by increasing global migration, understanding how migrant communities navigate social and cultural integration has become a critical area of study. Mutual support groups within these communities often function as vital spaces where immediate needs are addressed, but also where practices of care, solidarity, and belonging are negotiated. Consistently, much of the existing research on migration organizations and networks focuses on policy frameworks (Cullen, 2009), social and economic integration (Garkisch et al., 2017; Portes et al., 2007), entrepreneurship, and innovation (Rath et al., 2020), yet the intimate dynamics of how care and

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solidarity shape and sustain collective identities remain rather unknown. Exploring these processes sheds light on the ways migrant groups challenge dominant narratives of citizenship and redefine what it means to belong, offering deeper insights into the transformative potential of solidarity in contexts marked by diversity.

This article examines the concept of solidarity through the lens of citizenship activism within immigrant organizations in Chile. I begin by exploring how these organizations conceptualize and practice solidarity, highlighting their distinctive approach. The first section situates immigrant organizations within Chile's broader social movement landscape, reflecting on the country's transition to becoming a destination for immigration over the past decade. Then I move to review the historical role of solidarity in Chile, connecting it to migrant activism, noting participants' resistance to framing their efforts solely as acts of solidarity. The second section provides a conceptual framework, drawing on key contributions from social sciences and anthropology to understand solidarity. It examines the interplay between solidarity (as practice) and a particular morality (principles and values), emphasizing how these dynamics shape one another among participants. This section also binds these practices to the notion of acts of care, introducing insights from the anthropology of care (Fassin, 2014). The final section revisits the discussion that links migrant collaboration and participation to political commitment, framing solidarity as acts of care performed with others as equals, rather than *for* others. This political solidarity fosters a unique sociability, diverging from conventional understandings of solidarity in Chile. Concluding remarks underscore how this sociability emerges as an ethical project, challenging existing paradigms and deepening our understanding of citizenship dynamics in migrant communities.

Calle Catedral beats with the vibrant essence of Santiago's central district. The facades of the three-story buildings that flank the street wear the distinctive patina of urban life, marked by traces of traffic soot—a testament to the ceaseless movement below. Yet, climbing up the stairs of Catedral Street number 99, the headquarters nestled within leads you into a realm of tranquillity. Here, elevated ceilings infuse the rooms with an expansive and serene aura. For several months Sede Catedral stood as a pivotal hub for my fieldwork activities. Its three rooms serve as dynamic spaces of collaboration and coordination, hosting bustling meetings, lively dance sessions, and relaxed conversations over tea. Within its walls, migrant organizations, including Plataforma (a platform of migration and refugee organizations promoting and defending the human rights of immigrants in Chile) converge to share time, resources, and ideas. My fieldnotes vividly depict the crisp scent of freshly waxed floors, the sensation of neatness, and the lingering fragrance of lemon and *palo santo* in the air. The meticulous maintenance of the premises was paramount in achieving the harmonious cohabitation of diverse entities.

To schedule activities in this social centre, one had to meet with Dani, who allocated time slots based on activity details. Dani, a young Peruvian, started volunteering with Plataforma during a mass regularization process that proved particularly intricate and which helped several migrants. "I came here just as a volunteer during the second *Bachelet's* regularization. It never occurred to me that I would end up holding the keys!" Dani laughs and shakes the heart-shaped keyholder. She really is the *key master* of the location, coordinating with clarity and kindness to keep the many groups using the rooms in harmony. Upon approval, participants received confirmation, and their activity was added to the schedule board with one of Dani's colourful markers. After each activity, the group must ensure they leave the location as clean as they found it. This is especially important after the lively "Open Breakfast Saturdays" that tend to end with children's games and scattered cookie crumbs and pieces of fruit all over the floor. "I know it's not the most attractive building, but it's our

space," remarked Paola, one of my contacts and the head of Plataforma during those days. Paola, a young activist from Venezuela, became involved with migrant advocacy after the 2018 feminist uprising in several Chilean universities. She transitioned from leadership roles within the feminist student movement to become a spokesperson and leader of Plataforma Nacional de Inmigrantes, the biggest migrant organization in the country. As part of her tasks, Paola, Dani, Marcos, and several other activists work together to produce Open Breakfasts, an initiative that started during the first Covid lockdowns in Chile, in March 2020. The initial recommendation and definitive demand to "stay inside" and never go out on the streets hit particularly hard on all those families employed in commerce (formal and informal). Open Breakfasts functioned primarily as a food bank—at its peak, they managed to offer three meals during the week—but it soon became a space for support and assistance. Sometimes it operated as a daycare for children and teenagers, a place to go and connect with others, an (online) job bank, a place to get help when applying for one of the bonuses (direct money transfers) issued by the government during the Covid emergency, or a place for information regarding vaccination permits, circulation in the cities, and delivery of health kits.

The experiences of citizenship activists across Latin America make it clear that contemporary citizenship must be theorized in the context of societies marked by structured inequalities (Álvarez et al., 2018). Although liberal democratic definitions depict citizenship as a universal category that can be claimed by any legitimate member of the nation-state, it is important to recognize that such categories are enacted in politically structured contexts. In the late 1980s, as dictatorships gave way to more democratic societies across Latin America (the so-called third democratic wave; see Huntington, 1991), citizens had more opportunities to exercise their political rights. Over the years, civil society actors have increasingly taken advantage of this "openness" by demanding particular social and economic rights from which they had been excluded, such as housing, clean water, and education (Dagnino, 2003; Jelin, 1998). In this regard, Chile has seen a surge in social movements and citizen activism, including the student movement of 2011, the feminist wave of 2018, and the October 2019 uprising. These reflect a society disillusioned with political institutions, marked by low electoral participation—which has since led to the decision to establish voting as mandatory by law—and unrest fuelled by visible inequalities. Within this setting, migrant organizations emerged as actors of both contestation and collaboration, navigating internal debates over whether to prioritize political advocacy or cultural expression in response to societal hostility. Some focus on solidarity and mutual aid, others on protest and mobilization, while many engage in artistic and celebratory activities. This article examines these organizations' unique approach to solidarity, emphasizing how joint care and assistance foster new forms of sociability distinct from traditional notions in Chile.

Historically, Chile was not considered a destination for immigrants (Stefoni & Stang, 2017). However, rising and diversifying immigration has shifted this situation, the increase in immigration flows has been accompanied by both a reinforcement of a nationalist rhetoric and the growth of migrant and pro-migrant organizations grounded in collective action. Drawing on ethnographic research with 12 migrant organizations between July 2021 and June 2022 across cities like Santiago, Valparaíso, Casablanca, Rancagua, and Limache, this article explores their social bonds and acts of care. Over 80 interviews, informal conversations, and participant observation reveal how these groups challenge traditional narratives of belonging by building social worlds rooted in care, both among members and in their broader contexts. In Table 1, I specify the main organizations I worked with, their core focus, a description of their membership base, and the categories I used to identify their main field of action.

Table 1. Migrant organizations who enact solidarity included in this research.

	Name	Core focus	Membership and connections	Categorization (a)
1	Plataforma de Migrantes	Advocates for universal legal rights regardless of immigration status. Works to strengthen and unite migrant organizations across the country.	Diverse membership including long-term resident (20+ years) and newly arrived activists. Extensive nationwide network.	Political; festive; solidarity
2	Fuerza Migrante en Acción (FMA)	Champions migrant rights through policy advocacy, legislative reform, and implementation monitoring. Promotes human rights-based approaches to migration, emphasizing interculturality and inclusion.	Predominantly social science professionals with strong ties to academia, media, and arts communities. Active in Senate-level policy discussions.	Human rights; political; solidarity
3	Red Fronteras Libres	Community-based initiative focusing on intercultural integration and family support. Provides comprehensive legal guidance and social services while celebrating cultural diversity through events like the Carnival for Migrant Dignity.	Primarily composed of La Chimba neighborhood residents and local activists. Strong connections with municipal services and educational institutions.	Festive; political; human rights; solidarity
4	Tejidos de Resistencia	Raises awareness about Colombian conflict issues among Chilean society. Works closely with Plataforma while maintaining distinct advocacy positions.	Predominantly Colombian migrants and refugees. Strong partnerships with human rights organizations across Latin America.	Solidarity; political
5	Afrocéntricxs	They describe themselves as a social laboratory for Black and Afro-descendant women's collective action. Focuses on identity strengthening and decolonial practices through performance and cultural activities.	Young women and LGBTQ+ members with extensive international networks across Latin America and globally.	Solidarity; political; festive
6	Geopoéticos	Literary collective focusing on migrant narratives and cultural expression through poetry. Actively participates in cultural events and festivals.	Network of 50+ migrant writers nationwide, originated from Plataforma Migrante workshop. Predominantly male members over 30 with international literary connections.	Festive; solidarity
7	Revista Austral	Online publication platform promoting migrant community development since the 1990s. Provides visibility for migrant organizations and hosts literary competitions.	Close collaboration with Plataforma and FAM. Founded by Peruvian writers with extensive community connections.	Political; solidarity

Table 1. (Cont.) Migrant organizations who enact solidarity included in this research.

	Name	Core focus	Membership and connections	Categorization (a)
8	Casa Colores	Community cultural center in La Chimba offering educational and artistic programs. Successfully transformed abandoned property into vital community space.	Serves local migrant population while maintaining inclusive policy for all community organizations.	Solidarity; festive
9	Sak Pasé	Support network for Haitian women immigrants, evolved from a university outreach program. Provides practical assistance with healthcare access, language training, and cultural integration.	Led by Haitian and Dominican women. Operates with university funding support.	Solidarity; political
10	FEM Migrantes	Feminist migrant coalition coordinating with larger 8M movement. Focuses on connecting feminist activist initiatives within migrant communities.	Student-based organization integrated with broader feminist networks.	Political; solidarity; festive

Note: (a) During my fieldwork, I observed significant variations among these groups and networks, leading me to develop a three-category framework for their analysis: political organizations, solidarity organizations, and festive organizations. This framework, informed by both analytical and ethnographic considerations, emerged organically as participants often identified their groups as either "cultural" or "political" organizations. I refined these labels into three core clusters to reflect the primary focus of each organization. However, it is important to emphasize that most associations extend beyond their primary categorization, often engaging in activities beyond being solely "festive" or offering "assistance."

I should make the point that migrant organizations have been read as (political) activism, as well as a space for sociability and refuge. Dreadfully there have been different incidents of xenophobic and racist attacks towards migrants in the public space. Most famously, the Iquique attacks, when a mob decided to end a protest against migration setting on fire all the belongings of more than 40 families who were squatting for several weeks at the side of a beach near a residential area in the northern city of Iquique. In a conversation with Marcos, a Uruguayan migrant, one of the founders of Fuerza Migrante en Acción (FMA), he was letting me know of the rapid response they received after these attacks. A broad cross-section of society was appalled by the images of the piles of the burning tents and toddlers' cars that hit the media. He reacted with a grin after I inquired about the success of the improvised solidarity campaign towards the affected families (something that was also widely reported by the press). Marcos questioned this self-proclaimed notion of the "giving Chilean" (*el chileno solidario*), a trope commonly used to draw the Chilean national character:

> Chileans can spark solidarity in a second, *like that!* [he snaps his fingers] if and when they want to. With the Iquique attacks I saw it, the very next day we had foster homes for several families, and different local businesses offered their *galpones* [warehouses] to be temporarily used to host the families. That, on top of all the food supplies, clothing, and children's toys and books that we received. As horrific as the attacks were, [this] response was overwhelmingly beautiful….Now, I am fully certain that none of those who donated and were touched by the attacks are available to fight for a sustained system that helps migrants, or [anyone] who needs it for that matter, or would vote for candidates who are a bit more prone towards a human rights approach to face migration, etc. They can be *solidarios*, yes, but

> that one time, with this gesture, but they don't see how solidarity can or should be a more sustained part of their lives. (Interview, March 2022)

Marcos's point is that solidarity in Chile is mobilized by specific events and not a sustained form of interaction—a way of living—as I will propose in what follows.

A critical focus in my analysis is the rejection of the term "solidarity." Marcos is not the only one grinning when they hear the term; I repeatedly noticed how people reacted with at least some level of discomfort. Rooted in Chile's civil society history, "solidarity" is perceived as "aid among strangers," which does not align well with the deep interpersonal connections cultivated in migrant organizations. For them, care and mutual support transcend traditional solidarity, becoming a moral imperative and central to constructing their collective identity and narratives of citizenship. While focussing on the social bonds formed among these groups, my argument is that through acts of care—both among members and within the spaces they inhabit—these organizations are crafting their own social worlds, challenging traditional narratives of belonging and solidarity. In what follows I examine the genealogy of the term "solidarity" in Chilean civil society's recent history, my aim is to understand why my participants reject this term to describe their work. Simply put, they believe that "solidarity" in Chile is used to describe actions taken among strangers, which doesn't reflect their reality.

It is fair to point out that in the case of Chile, these solidarity actions (understood as spontaneous mutual support actions developed by civil society) occupy the role that in other contexts is coordinated by state institutions. The lack of a system of social protection creates the pressing need for mutual help and generosity among citizens who know that, at times of need, they can only rely on each other. Furthermore, due to Chile's focalization welfare paradigm (Román et al., 2014), the few programs supporting families and their livelihoods in Chile are reserved for the very poor, hence, receiving "state-funded solidarity" carries some stigma. As it has been documented, a direct consequence of the neoliberal model, Chileans have come to understand achievement and individual well-being as a matter of personal responsibility (Heine, 2002). Interestingly, my participants avoided labelling their work as solidarity. Instead, they preferred phrases like "building a community," "giving a hand to their extended family," and "creating a world worth living in." I have reached here a relevant first distinction between solidarity among equals and solidarity with others, which in a way mirrors the notions of solidarity per se and solidarity as charity, as will be unraveled in what follows.

In the Chilean context, the concept of solidarity has multiple meanings and historical associations. After the 1973 coup that abruptly put an end to the short-lived *Chilean way* to socialism, the ensuing state terrorism led to an international solidarity campaign supporting Chile (Christiaens, 2018). For older generations, "solidarity" evokes memories of international human rights and political organizations, particularly those on the left. This type of solidarity, which I term "political solidarity" (Scholz, 2008), is characterized by a desire for social change and an emotional commitment to politics (Goodwin et al., 2001). Unlike other forms, political solidarity is typically aimed at explicitly challenging oppression (Featherstone, 2012).

Solidarity as charity has a strong standing mark in the country. Influenced by the Catholic Church and other benevolent institutions (Klesner, 2007), especially during the economic crisis of the 1980s, a common notion of solidarity in Chile connects the term with charity. The dictatorship's austerity measures during this period led to a nearly 30% rate of unemployment (Klein, 2010; Reigadas, 2007), prompting the rise of "soup kitchens"

and communal pots in urban peripheries, often funded by the church (Thörn, 2009, p. 421). The notion of solidarity as synonymous with charity that this period generated persists and it is the most widely shared one: solidarity as spontaneous actions performed for others in response to specific events, such as family illnesses, fires, accidents, or natural disasters. During the Pinochet regime, solidarity encompassed both activism against human rights violations and charity campaigns by the church and NGOs. After the return to democracy in 1990, solidarity lost its direct political connotation and became associated with aiding the poor. This new narrative posits that solidarity is not solely the state's responsibility but is also shared with the private sector. A notable example of this is *Teletón*, a yearly televised campaign carried out since 1978 that raises funds for children suffering from physical impairments, reflecting a broader Chilean practice of organizing fundraisers for those in need. Although its meaning might have varied over time, solidarity is a central element of the Chilean national imaginary, valued as a moral principle and part of national identity (Reigadas, 2007; Román et al., 2014): solidarity as "helping those in need," especially among the middle and lower classes—spurred also by the uncertainty that one may find oneself in that position in the future.

Oriana, a Colombian member of Afrocéntricas, shares with me her reasons for giving time and effort to the organization she participates in:

> It's about giving back and showing that one can be safe here, I am here to help build this space, every day, piece by piece. I wouldn't feel as a whole [*completa*] if I didn't lend a hand to those who need it. Not just this once [but] all of the time, in the future, to my *compañeras* [my friends], to myself, this helps me too, you know? It makes me who I am. (Interview, March 2022)

In Chile, solidarity is often seen as individual acts of generosity. However, activities like Open Breakfasts, Noche Afro, the Haitian Bazaar, and poetry workshops are not just about helping others but also building a better life for everyone—*a vida digna*. Rose, a Haitian young mother and volunteer from Sak Pasé claims:

> I am here because I was part of Sak Pasé's first edition, four years ago, I am a graduate from this love and care, I am giving back, yes, I had nothing, now I have them, this helps me push where I want to go, be the woman I would like to be. (Interview, March 2022)

Solidarity as acts of care sometimes is performed as a moral imperative that motivates migrants to engage in political actions aimed at improving current and future living conditions. This commitment fosters meaningful relationships and collective/mutual care, emphasizing integration and personal fulfilment.

2. Solidarity—The Avenue From Social Cohesion to Interdependence and Ethical Living

Solidarity is a complex term, famously explored by Emile Durkheim. Durkheim (1893/2001) argued that solidarity explains how society holds together and what ties individuals to it. For Durkheim, solidarity is essential for producing meaning in people's lives and anchoring social ideals and values. Defined as our attachment to others, it is the source of human morality (Jones, 2001, p. 97; Miller, 1996). Durkheim distinguished two types of solidarity: (a) mechanical solidarity, which is found in what he referred to as "primitive societies" and based on collective conscience, and (b) organic solidarity, which is typical of modern societies and based on interdependence between individuals. At the interactional level, solidarity is usually linked to a wide range of concepts, ranging from "community" (Mason, 2000) to "associativity" (Reigadas,

2007), "collaboration" (Arnold-Cathalifaud et al., 2007) to "networks" (Breiger & Roberts, 1998) and "social capital" (Klesner, 2007). Solidarity has also been tied to a notion of "social responsibility" when linked to the distinction between the public and private sector (Schuyt, 1998). From a sociological perspective, solidarity has been analysed as a systemic response to social exclusion, functioning as a promoter of social inclusion (Mascareño, 2007). These approaches often view solidarity as purposeful actions or connections designed to bridge differences or address inequalities temporarily and externally. However, my participants reject this systemic and impersonal perspective. Instead, their actions align more closely with a notion of solidarity rooted in agency, framing it as a political project aimed at counteracting atomization and social disintegration (Papataxiarchis, 2016). In this context, the work of Martín-Baró (1991) is particularly relevant, as he conceptualizes solidarity as a pro-social action that fosters social justice and collective responsibility. Following this trend, we can also find what Hunt-Hendrix and Taylor (2024, p. xix) mean by transformative solidarity: a search to expand the circle of inclusion while also altering society's very character. I particularly value these authors' emphasis on transformative solidarity being both a means and an end, i.e., both the process of "struggling together" and a way of describing a kind of society that is more just and mutualistic.

In this article, I follow the Durkheimian tradition that connects solidarity with morality while at the same time highlighting its connection with agency. This might appear odd since Durkheimian approaches tend to be inclined to work systemically and in a rather top-down approach. Contemporary readers of Durkheim (Jones, 2001; Miller, 2002; Tiryakian, 2016) have thought of mechanical and organic solidarity not as different stages of society but as qualities of different social configurations that can (and do) coexist. Agency here is in the will of these organizations to foster interdependence and work counter-current in the context of a strong self-achievement narrative. Morality is present when the latter relates to the way my participants give meaning to their actions and their political involvement. The role solidarity has a clear moral component when social ties of solidarity *give meaning* to the lives of social actors, renovating and providing a place for social ideals and values to thrive in. In sum, the attachment individuals create to one another is the source of morality (Jones, 2001, p. 97; Miller, 2002, p. 150) and in the sociological tradition, this attachment can be labelled as solidarity. Similarly, the opposite could be argued, i.e., that it is through political commitment and solidarity that such morality is shaped.

Practices labelled as solidarity carried out by migrant organizations can also be understood as works of care. Care relationships are pivotal for human connection, moral engagement, and new forms of personhood (Buch, 2018; Mol, 2008). Following Tronto (1993, pp. 105–108), I focus not only on the care-receiver or the care-giver, but also on the process of care from its very start, that is, the detection of the need for care (to care about), the decision-making and organizing of care (to take care of), the actual providing and receiving of care, and the overall relationship developed in that exchange. Rooted in reciprocity, care practices involve emotional aspects and temporal considerations (Thelen, 2015). Anthropology of care explores diverse relational dynamics involved in the acts of care (Constable, 2009; Gutierrez Garza, 2019; Zelizer, 2010), emphasizing the political impact of care on belonging and citizenship notions (Coe, 2019; see also Brown, 2011). Community-based care initiatives, like the ones I analyse in this article, foster a particular kind of solidarity and challenge traditional care and community norms (Bakke, 2005; Brown, 2011; Scherz, 2014). These initiatives prompt reflection on inclusivity and solidarity, emphasizing committed participation as essential for stimulating care and community cohesion. My focus is on adding depth to solidarity actions by theorizing them as acts of care, all the while examining the ethical dimensions at play. When migrant activists say they "participate and get involved in these organizations in the pursue of a good life,"

I wondered what it means for them to "live a good life," as it appears, for them, that a good life involves being there for others and building reciprocal connections, which seems particularly vital for migrants.

Migrant activism in Chile unmistakably has a side sustained by solidarity and mutual assistance networks. In what follows I trace their activities along these lines and explore how their acts of mutual support and solidarity contribute to the establishment of a sense of political belonging and how their actions can be read as political commitment. I follow the notions of care and solidarity among migrant activism in its various usages (emic notions) and revise relevant scholarly accounts of such terms. I further reflect on the organization's moral commitment behind their participation and works of care with one another. Through activities such as Open Breakfasts, I see an act of becoming "a we," a work of building a collective ethos, all of which is central to the citizenship narratives under constructions here.

In an interview with Marcos, a member of FMA and Plataforma, in Santiago de Chile, he noted:

> People use solidarity to talk of specific actions, specific help, in a specific time. That's not what we do here, that's why we don't use that word, we don't do solidarity, charity, we just are here for each other, all the time, and we help one another as part of our lives. (Interview, January 2021)

Marco's point is that he observed that "solidarity" is what is mobilized by specific events and not a sustained form of interaction, or a "way of living," as he says. I consider this distinction particularly significant based on what I see represented by "solidarity actions" by the organizations I got to work with. Whereas it was Open Breakfasts, poetry workshops, civic education and language courses, chess clubs, or knitting circles, the participation I observed in these groups was not sporadic or signalled by an event or a particular circumstance. They derived from a willingness to find each other (*encontrarse*) and spend time together—here I speak both about those organizing and those attending. Also, what makes it "a way of living" in Marco's words, is that these activities permeate their day-to-day lives. Dani must collect the grocery cart the day before every Open Breakfast: On her way to work, she passes by the municipality's bank food with her cart filled with grocery donations to see what she will use and discuss the possibilities for the menu for each Saturday; she also meets several people going in and out of Sede Catedral every day and sometimes accompanies them to a first job interview or a doctor appointment. Over the months I attended Sede Catedral and other community centres used by these organizations, I noticed the intimacy among them: They knew each other's children's names and their graduation dates, whose kids were about to fail math—and hence needed a spot on the reinforcement courses—just to list a few examples. The intricate network of mutual help also included favours and connections (*datos*) that went beyond the organizations themselves. This privileged information was passed around from one member to another as secret key makers; I would often hear conversations that ended with: "Oh, what you need to do is to call *this number*, call and ask for [X], tell [X] it's from me, he will help you with this."

3. Political Commitment and Solidarity

Political commitment can be defined as "the willingness of individuals to expend time, energy, and resources in pursuit of collective political goals, often driven by ideological beliefs or group affiliations" (Tilly, 2005, p. 12). As such, it encompasses various forms of engagement, including participation in social movements, voting behaviour, and activism, and is influenced by factors like social networks, political opportunities, and

cultural context. Now, from an anthropological perspective, political commitment extends beyond formal political structures to also involve "the active engagement of individuals in shaping the social and political landscape of their communities through culturally mediated practices and collective action" (Fassin, 2009, p. 24). This definition emphasizes the role of cultural norms, power dynamics, and local contexts in shaping individuals' participation in political processes and social change efforts. As social beings, we are constituted through relations with others; this process starts with the mother–infant bond, but is mediated by what society objectifies as the identities people are given, names, statutes, roles and the positions they occupy, values or ideas they come to identify with. When discussing political commitment, I emphasize the second part of the process. How and why do people keep their commitments? Why do migrants commit to their organizations, especially in such cases (which are the overwhelming majority) when they are "well-off," or at least have reached a stable position in terms of employment, housing, and other integration matters? Why are they involved and devoted to spending most of their weekends and virtually all of their leisure time in these organizations and networks?

Political commitment involves individuals' dedication to collective political goals driven by ideological beliefs or group affiliations, encompassing various forms of engagement like social movements and activism. From an anthropological viewpoint, political commitment extends beyond formal structures to include shaping social and political landscapes through collective action and culturally mediated practices. Trust, social capital, and self-reflection play key roles in maintaining commitments and balancing obligations in daily life.

Issues of trust and social capital are fundamental in understanding how people preserve commitments they make, or to what degree those commitments make sense for them. The link I try to draw towards ethics is sustained in the idea that commitments are also very relevant to the self: How do I initiate and keep commitments? How do I balance my various obligations in daily life? How do I maintain some consistency between giving to others (time, efforts, resources) and being, myself, open to receive and do what is right, be a good person, live a good life? I witnessed this sort of thought process among the organized migrant activists I worked with. When asked why they participate, activists tend to agree that participation comes smoothly, it is not a huge sacrifice (although sometimes it involves waking up at 6 a.m. after a 60 60-hour working week). Here is where morality comes in; they connect their participation and involvement with the notion of *compromiso*. Commitment is linked with the idea they have about how to "be good," how to "live a good live," or how to "make the world a better place." Migrant activists, as noted by Jones (2001), aid others not just out of altruism but to build a support network for themselves and their community, countering a dominant individualism and affirming the significance of collective solidarity. Paola, a member of Afrocéntricas and spokesperson of Platform, connects her activism with "being a sound person" (*ser una persona completa*):

> I guess it has to do with my upbringing, yes, but it is also something I have learned here, among my *compañeros* and *compañeras*: You need to be for one another, even when it's hard and when you are tired, we all work long hours, most of us don't get paid enough, yet the appreciation we get is just priceless. I feel safe, I know that if something were to happen, they will lend me a hand, or help my kid, or if she gets into trouble, they will let me know, or they will help her, without a doubt. If I did not have this, I [would] feel incomplete, as if something was missing, not only in the sense that I couldn't do it on my own, because I probably could. But it would be meaningless. (Interview, March 2022)

Paola has been living in Chile since the mid-90s, but she has only recently joined Plataforma following her involvement with Afrocéntricas. At the organization Paola collaborates as a therapist; she studied psychology in Chile in night school. Laughing, she remembers being particularly distrustful of all collective action at the beginning:

> I used to say, what are these meetings for? Nothing is going to change! Those who are already in a good place help each other to keep all for themselves! Yes, that is what I used to say. And in part I still believe that. But what I did not know, for being too young or too disappointed from my previous political experience…is that there is no necessity to gain something concrete. Being here is already my prize. Let me tell you, the way I saw it before, organizations were here to demand from you, right? From members, but then, it was not reciprocal because I thought they offered you nothing. With Afrocéntricas everything changed, I just felt a part, I saw a clear retribution…and not that you should benefit from everything you do, but it is good to feel that balance! (Interview, April 2022)

Paola's point was made several times when I pondered on their reasons for participating. Organizations seemed devised to help others as well as to help oneself, wellbeing spaces. So, combined with a sense of interdependence, these morally motivated actions are ordinary acts (that are performed day to day) that are expected to involve (help) the organizer as much as those who are at the receiving end of the solidarity action (reaffirming the processual approach towards care). This is also why I embrace the notion of care, instead of maintaining solely the notion of solidarity.

4. Final Remarks

In this article, I explore four key topics. First, I discuss solidarity from sociological and anthropological perspectives, drawing on Emile Durkheim's work on social differentiation and interdependence to interpret solidarity as political belonging and acts of care. Second, I examine the concept of solidarity in the Chilean context, highlighting its varied usages from isolated charitable acts to political actions against a common oppressor. Third, I connect solidarity to the anthropology of care, showing that the solidarity actions I observed can be seen as acts of care, adding new dimensions to the notion of solidarity. The fourth topic introduces political commitment (*compromise*), which bridges solidarity and care on a horizon of social change.

Anthropology's focus on ethics is crucial. As Taylor (1989, p. 15) describes, moral thinking involves respect for others, understanding what makes a full life, and notions of dignity. Migrant activists' commitment (*compromise*) is driven by a sense of moral obligation, integral to their identity and societal relations. Embracing interdependency in a context dominated by self-achievement narratives, their collaboration in local organizations challenges the view of solidarity as a momentary effort limited to the *real* deserving. By interrogating the intersections of solidarity, political participation, and everyday life, I aim to uncover how care becomes a site of struggle, resistance, and ultimately, the pursuit of a more just and dignified existence. The politicization of care tasks expands the discourse beyond traditional notions of politics, while care is often associated with intimate, domestic gestures, it can also reflect struggles for dignity, autonomy, and social justice. When recognizing the political dimension of care, we acknowledge that everyday acts of nurturing and support are imbued with social significance, contributing to broader struggles for equality and human rights. Valuing these more invisible forms of resistance I recognize the creativity and strengths of marginalized communities in the face of adversity. This perspective challenges traditional notions of heroism

and instead highlights the transformative potential of collective action, both within the home and in broader social movements.

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Conflict of Interests

The author declares no conflict of interests.

Data Availability

The research data underlying this article can be shared upon reasonable request to the corresponding author, subject to institutional ethics and confidentiality protocols.

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ARTICLE

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Quarantined Justice, Compromised Diversity: Barriers to Disability Inclusion in China's Public Sector Employment

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Abstract

Under the advocacy for diversity and inclusion within Chinese society, the judiciary has become a significant institution for the protection of marginalized groups, especially disabled people. Through proactive power expansion, the Supreme People's Court has played a crucial role in scrutinizing employment discrimination in the private sector. However, the judiciary has paid less attention to the fact that government agencies failed to consider the value of workplace diversity and maintained ableist standards that preclude many disabled candidates from public sector positions. Due to the intrinsic political embeddedness within Chinese judicial systems, courts tended to adopt a strategy known as "quarantined enforcement" when confronted with discriminatory recruitment clauses issued by government-tied entities. Social and political factors collaboratively shaped the intersectional marginalization of the disabled community in China. This article attempts to move beyond traditional legislative-centric approaches and emphasize the judiciary's role in minimizing the marginalization of disabled people. It argues that eliminating political barriers within the judiciary is crucial for achieving workplace diversity and employment equality.

Keywords

disability equality; disability rights in China; embedded court; integrated employment; quarantined justice; social diversity

1. Introduction

Stereotypes and stigmatization of the disabled community have led to their marginalized status in job markets, seriously undermining social solidarity. Despite more than 30 years of efforts to promote inclusive

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employment, the employment rate of disabled individuals in China has seen little progress (L. Yang & Hao, 2019). According to the latest data from the China Disabled Persons' Federation, as of 2023, only around 10% of individuals holding disability certificates in China were employed (China Disabled Persons' Federation, 2024). Furthermore, these jobs were mainly in unstable, lower-tier sectors such as agriculture, husbandry, and massage services. The enduring stereotypes of disabled individuals as "passive, sickly, and pitiful" (Z. Y. Jiang, 2019) persist in the private labor market and are even more pronounced in government recruitment. Stringent physical examination standards for civil servants impose "one-size-fits-all" requirements that do not consider the specific requirements of individual positions, effectively excluding individuals with visual, auditory, and mental impairments from government jobs (Liang, 2008; X. N. Liu, 2015). Under the perspective of "mechanical solidarity" (Durkheim, 1933; Gofman, 2014), this homogeneous filtering mechanism reinforces the marginalization of disabled individuals, restricting their access to equal employment and full participation in society.

Most Chinese disability studies attribute the marginalized status of disabled individuals to the lack of accessible institutional support, particularly the inadequacies in legislation and government policies. The lower hierarchy of the Law on the Protection of Disabled People (LPDP; Standing Committee of the National People's Congress, 2018b) within China's legal system significantly restricts equal access to justice for disabled people (Qi et al., 2019; Tang & Cao, 2018). The Regulations on Labor Security Supervision (State Council of the People's Republic of China, 2004) do not explicitly include employment discrimination within the supervision scope of labor security departments. These government institutions typically do not accept complaints regarding employment discrimination (H. N. Yang, 2024). However, previous academic dialogues have largely overlooked the judiciary's crucial role in promoting equal employment and social diversity. Most disability studies guided by traditional doctrinal approaches tended to set aside the socio-legal analysis, failing to fully consider the complex social, institutional, and political barriers faced by the disabled community in China. The key point here is that the judiciary wields substantial discretion in implementing national legislation, particularly the equality clauses of the LPDP and the Employment Promotion Law (EPL; Standing Committee of the National People's Congress, 2015). The courts' institutional capacity, interpretative discretion, and external pressures can significantly affect the practical enforcement of these laws. Therefore, it might be incomplete to attribute the marginalization of disabled employees solely to the unresponsiveness of laws and policies.

The intersection of judicial behavior analysis and socio-legal approaches is crucial for identifying the practical barriers to implementing equality laws and addressing the real challenges faced by China's disabled community. Moving beyond the traditional legislative-centric perspectives of disability studies in China, this article incorporates broader social and political contexts and emphasizes the importance of eliminating judicial barriers to create an inclusive employment environment. Furthermore, to address the lack of empirical analysis in prior doctrinal legal studies, we collected twenty-eight employment discrimination cases involving disability by searching the keywords "disability" and "employment discrimination" on *China Judgments Online* (CJO), the official case database established by the Supreme People's Court (SPC). Since our data collection was completed in July 2024 and covers cases from September 2014 to December 2023, the recent reduction in case upload volume in CJO does not significantly affect our study. We excluded twenty cases that are not relevant to our topic, including eighteen cases on disability compensation for work injuries and two cases lacking sufficient detail. Given the limited availability of cases in CJO, we supplemented our sample with two additional cases through media reports and connections within the

disability community. Our final dataset comprised ten cases in which disabled plaintiffs (eight men and two women) claimed employment discrimination. These included three cases where applicants were refused employment, three cases in which employees were denied raises and benefits, and four cases where employees were dismissed by the companies. Of the seven cases brought against private companies, five resulted in victories for the plaintiffs, while all three cases against government entities ended in losses. Our examination focused on two successful cases involving private enterprises, and three lost cases in the public sector. We also incorporated one Guiding Case regarding equal employment rights issued by the SPC into our discussion.

The structure of this article is as follows: First, we highlight the tentative efforts of local courts to promote equal employment within the private sector, driven by the SPC's institutional innovations. Following this, we display empirical data and cases to illustrate how discriminatory recruitment standards persist in government and public agencies. Due to the deep-rooted political and financial embeddedness, Chinese courts face significant constraints in effectively challenging discriminatory practices against disabled people in civil service recruitment. Finally, we emphasize that eliminating "quarantined justice" is crucial for overcoming such compromised diversity and achieving truly inclusive employment in China.

2. The Courts Against Marginalization: Judicial Power Expansion in Equal Employment for Disabled People

Equality clauses have been adopted in China's Constitution and various national laws for decades. The most relevant one is Article 3 of the EPL (Standing Committee of the National People's Congress, 2015), which prohibits any employment discrimination based on ethnicity, race, gender, religion, and other relevant grounds that could include disability. Similar provisions are also included in the LPDP and the Law on the Protection of the Rights and Interests of Women (Standing Committee of the National People's Congress, 2022). However, these clauses primarily offered general, declarative principles without actionable mechanisms to identify or address disability discrimination in the workplace. Due to their lack of specificity, the application of these equality provisions remained stagnant in labor dispute judgment during the past two decades (Fu, 2012). Despite recent initiatives by the Supreme People's Procuratorate to release model public interest cases regarding employment discrimination against disabled individuals (Supreme People's Procuratorate & China Disabled Persons' Federation, 2022), their practical impact on implementing equality clauses remained limited. For instance, in one case, the Huangpu District Procuratorate in Guangzhou City found job postings by several companies explicitly exclude disabled candidates. The procuratorate thus initiated prosecutorial suggestions to the local government's labor and social security department, urging it to launch a targeted campaign to address such discriminatory actions. Nonetheless, the impact of these public interest cases has been largely limited to "pre-litigation procedures," which merely recommend corrective actions rather than tackling the institutional obstacles to enforce equality clauses in litigation. In most employment discrimination cases, the disabled victims were still faced with numerous legal difficulties, including the lack of a clear definition of rights violations, the absence of established legal consequences for such violations, and even the uncertainty regarding the appropriate cause of action for these cases.

Given the limitations of legislation in effectively addressing employment discrimination against disability, the expansion of judicial power offers a potential remedy. In recent years, judicial power expansion has become a

significant phenomenon in China, with many landmark policy reforms originating from the courtrooms (Chen et al., 2024; Stern, 2013). A series of empirical studies showed that Chinese courts can be potential arenas for policy innovation such as environmental protection, administrative disputes, and labor rights protection (Ahl, 2019; Chua, 2019; He, 2013; Yu, 2014). China's highest court, the SPC, has increasingly positioned itself as a key player in social governance by strategically expanding its discretionary boundaries (Finder, 2024; T. S. Zhang, 2012). As one of the significant steps in enforcing employment equality, the SPC amended its Provisions on the Causes of Action for Civil Cases in 2018 (SPC, 2018b), establishing "equal employment rights disputes" as an independent cause of action. This action directly addressed a widespread problem where local courts routinely rejected employment discrimination cases in the filing processes due to ambiguity over the applicable cause of action (Yan, 2014). The "equal employment rights disputes" also provided a clear legal avenue to address discrimination occurring even before an employment contract is signed. In recruitment processes, job seekers often encounter subtle and invisible forms of discrimination based on gender, age, and, most notably, physical conditions and disabilities. However, before the SPC amended its regulations, disabled individuals could not file a "labor dispute" lawsuit without a signed employment contract. By introducing "equal employment rights disputes" as an independent cause of action, the SPC recognized that discrimination can occur before an employment contract is established, thereby expanding legal protections for job seekers, particularly those with disabilities.

Since China ratified the Convention on the Rights of Persons with Disabilities (CRPD; United Nations, 2006) in 2007, the SPC has actively pursued the implementation of Article 13, "Access to Justice," through a series of policy documents. In its Opinions on Effectively Safeguarding the Lawful Rights and Interests of Persons with Disabilities during the Trials (SPC, 2018a), the SPC promised to make judicial proceedings accessible to all disabled individuals, providing reasonable accommodations such as online and telephone case filing, in-vehicle courts, remote hearings, and in-home mediation. It also collaborated with the China Disabled Persons' Federation to provide sign language interpreters and Braille services and worked with the Ministry of Justice to facilitate legal aid access. From 2016 to 2019, the SPC organized a series of human rights training programs to enhance disability awareness among judges. Around 356,000 individuals with disabilities received legal aid in judicial proceedings (Chinese Government, 2021). In response to the 2023 Accessible Environment Construction Law (Standing Committee of the National People's Congress, 2023), the SPC recently established a unified standard for constructing accessible facilities in all local courts (SPC, 2024). While not directly targeting employment discrimination, these policies reflect the growing awareness of disability equality and may promote broader disability inclusion within the judicial system.

The SPC's proactive power expansion in addressing disability discrimination can also be shown in Guiding Case No. 185 (*Yan Jialin v. Zhejiang Sheraton Resort Co. Ltd*, 2022). In this case, Ms. Yan Jialin applied for a position at the Sheraton Company, only to be rejected because her employer deemed her origin from Henan Province "unsuitable" for the position. The court found that the company's hiring criteria based on regional origin constituted "differential treatment," placing Yan at a "disadvantage" compared to other applicants. It further held that, since there was no "inherent relevance or lawful basis" to link regional origin to the job's requirements, the employer's differential treatment should be deemed as employment discrimination. While this case dealt specifically with discrimination based on region rather than disability, its significance extended beyond its particular context—prior to this ruling, there was surprisingly no legally binding standard or consequence for employment discrimination. For instance, in one previous case, the Beijing First Intermediate Court failed to assess whether the physical disability of the applicant had any "inherent

relevance" to the job position, even stating that "it is a common understanding that not all jobs can be fully performed by disabled people" (*Li Qi v. Beijing Zhongwang Online Advertising Company*, 2014). In Guiding Case No. 185, the SPC took a significant step by recognizing that unjustified differential treatment that does not have "inherent relevance of the job"—such as geographical background and, potentially, disability in future cases—constitutes employment discrimination. It also clarified that tort liability claims based on violations of equal employment rights should be supported in judgments. In a word, Guiding Case No. 185 demonstrates how the definition of and remedies for employment discrimination in China are increasingly shaped by judicial rulings rather than national legislation and government policies.

The profound impact of Guiding Case No.185 is more than a single judgment. Although China follows civil law traditions, all subordinate courts "should follow" the guiding cases issued by the SPC (SPC's Provisions on Case Guidance, 2015). This means that Guiding Case No. 185 would serve as *de facto* "case law" in future judgments on employment discrimination throughout China. A recent case issued by the Longgang District court in Shenzhen City involving a disabled individual further exemplifies how No. 185 is reshaping equal employment litigation in China (*Li Wenguang v. Shenzhen Keruinaisi Technology Company*, 2022). In August 2021, Li came across a job posting for an operations manager at an e-commerce company in Shenzhen City. Given the match between his qualifications and the specific requirements of the position, he applied for this job and successfully passed two rounds of in-person interviews. Li was then required to take a physical examination as part of the pre-employment process. Upon reviewing Li's medical examination report, which noted "a few items requiring regular follow-up due to a condition of sinus bradycardia," the company chose not to proceed with the hiring process. Despite Li's efforts to provide further explanation or arrange a secondary physical examination, the company still refused to hire him because of the "high-risk factors" associated with his health condition. Later, Li filed a lawsuit citing "equal employment rights disputes" as the cause of action. In court, the employer defended that their decision was motivated by a desire to mitigate the "potential risks" related to Li's health deterioration. Although the court did not explicitly cite Guiding Case No. 185 in its judgment, it effectively applied the same legal reasoning structure. The court found that, as Li's sinus bradycardia was not "inherently relevant" to the job position, the "unreasonable treatment, exclusion, and restriction based on physical condition" constituted employment discrimination, violating his equal employment rights. The court further clarified that the core criterion for determining employment discrimination is "not merely in the presence of direct discriminatory behavior," but rather an assessment of whether the employer's decision is "legally relevant and reasonable." This case was considered the first successful case brought by a disabled individual after "equal employment rights disputes" became an independent cause of action.

Leveraging Guiding Case No. 185, local courts even improved and expanded judicial approaches to protect the employment rights of disabled people. In a recent case handled by the Guangzhou Intermediate Court, the court further broadened the concept of "employment discrimination," extending its application to social insurance coverage (*Tao Shiwei v. Guangdong Taike Security Services Co.*, 2023). Tao, a man with intellectual disabilities working at a security company, was refused to pay social insurance contributions by his employer. Under China's Labor Law, companies have mandatory obligations to pay social insurance premiums for their employees (Standing Committee of the National People's Congress, 2018a). The defendant company argued in court that Tao had concealed his "intellectual disability" during the recruitment process, using this "fraudulent behavior" as grounds to refuse to pay social insurance for him. The legal reasoning of the Guangzhou Intermediate Court's judgment was consistent with Guiding Case No. 185. By citing Article 30 of

the LPDP, the employment equality clause, the court found that despite Tao's intellectual disability, his cognitive abilities were sufficient for his security guard role, and the employer's refusal to meet mandatory insurance obligations constituted discrimination against a disabled employee. Consequently, the court ordered the company to compensate Tao for the unpaid social insurance, reinforcing the principle that denial of benefits based on disability is another breach of equal employment protection.

By establishing the anti-discrimination Guiding Case, the SPC has empowered local courts to strategically leverage institutional tools to advance employment equality for disabled people. In our examination, it is important to note that, before Guiding Case No. 185, there was virtually no successful case regarding disability discrimination in the workplace. However, the number of successful cases has notably increased following Guiding Case No. 185. It is not difficult to predict that Guiding Case No. 185 will continue to trigger ripple effects in the Chinese judiciary, as local courts are now better equipped to address such cases with enhanced clarity, consistency, and equal awareness. These judicial efforts, though seemingly gradual, can generate sustained and significant changes, progressively bringing the equal employment clauses closer to realization.

3. Rigid Standards, Mechanical Solidarity: The Discriminatory Practice in Government Recruitment

The stringent Physical Examination Standards for Civil Servants (PESCS; Human Resources Department of Social Security et al., 2016) in China have long faced criticism for their discriminatory implications (Guo et al., 2015; Y. Jiang et al., 2002). Empirical data indicates that the discriminatory regulations of PESCS have adversely affected the equal employment rights of nearly 200 million health-disadvantaged individuals, including those infected with HIV (780 thousand), patients with hematologic diseases such as thalassemia gene carriers (10 million in Guangdong), diabetics (97 million), and individuals with hearing (12.63 million) and visual (20.54 million) impairments (Guo et al., 2015). According to Articles 11, 19, and 20 of the PESCS, candidates with hearing (unable to hear whispers within three meters) or visual impairments (both eyes corrected to less than 0.8 vision), as well as those with a history of mental health conditions, are automatically deemed "unqualified" for any civil service role. While such standards may be justifiable for physically demanding roles such as police officers or firefighters, they fail to assess how applicants' conditions might actually affect job performance or meet the specific requirements of different job positions. Such discriminatory standards within PESCS indicate a clear ableism among policymakers that individuals with certain disabilities are "inherently incapable" of performing specific work duties, neglecting the possibility of fulfilling job requirements through reasonable accommodations. More problematically, although the PESCS was revised in 2016—nearly ten years after the adoption of the CRPD and eight years after China's ratification—the awareness to provide reasonable accommodations under Article 27 of the CRPD was conspicuously absent in China's public employers. This absence is not merely a procedural oversight but a substantive failing that perpetuates structural discrimination against disabled people—nearly all recruitment standards of government and public institutions are either directly based on the PESCS or adopted its criteria indirectly.

According to a report by the NGO Tian Xia Gong (2011) on disabled civil servant recruitment in Eastern China, only eight disabled individuals were recruited as civil servants in Jiangsu, Zhejiang, Anhui, and Shanghai between 2008 and 2011. In these regions, the average employment rate of disabled individuals is

only 0.03%, far below the 1.5% standard stipulated in Article 8 of the Regulation on the Employment of the Disabled (State Council of the People's Republic of China, 2008). In recent years, although some regions have set civil service positions specifically for disabled people and have moderately relaxed physical examination standards, these positions remained scarce (Shi, 2022). Numerous cases of discrimination have demonstrated the systemic barriers faced by disabled individuals in public sector employment. For instance, Tan Jinsong, who only has a visual acuity of 0.3, ranked first in both written and oral exams for a position in the Legal Affairs Office of Yueyang City Government. Nevertheless, he was rejected by the government solely due to his visual impairment (Tan, 2016). This was because the civil servant recruitment rules in Yueyang City strictly adhere to the national-level standards of the PESCS, requiring candidates to have a visual acuity of 0.8 or above in both eyes. Similarly, Zheng Rongquan, the first student in Zhejiang Province to use Braille papers in the college entrance examination, failed to meet the stringent visual acuity standards required for public school teachers (H. L. Zhang, 2019). He applied for a teaching position at the Nanjing School for the Blind and achieved top scores in both the written examinations and interviews. However, the Public Recruitment Announcement for Teachers in Nanjing Municipal Schools (Nanjing Education Bureau, 2019), which strictly adheres to the PESCS standards, mandates that all job applicants must have a visual acuity of 0.8 or above in both eyes. Otherwise, they will be automatically deemed "unqualified" for recruitment. Similar discrimination even extends to height requirements. Zhu Jingjia, a female college graduate, was denied entry to the civil service selection exam in Guangdong Province solely because she was only 148 centimeters tall (Y. Jiang et al., 2002). According to Article 12, Clause 11 of the Physical Examination Standards for Civil Servants (Guangdong Province Government, 1999), male candidates must have a height of at least 1.60 meters, while female candidates must be at least 1.50 meters tall. Despite Zhu's excellent academic performance and background, the two-centimeter height deficit disqualified her from entering the public service. In a similar scenario, Zou Mi, a half-paralyzed wheelchair user, passed both the written and oral tests for the teacher qualification examination. However, she was still unable to obtain a teacher certificate due to discriminatory government regulations (Y. L. Zhang, 2021). According to the Physical Examination Standards for Applicants for Teacher Qualifications in Chongqing City, which is drafted based on the PESCS, individuals with severe deformities and diseases of the musculoskeletal system will be deemed "unqualified" to apply for the teaching qualification certificate (Chongqing Municipal Education Commission & Chongqing Municipal Health and Family Planning Commission, 2016).

4. Quarantined Justice: The Courts' Dilemma in Governmental Employment Discrimination

Local courts have demonstrated their commitment to applying the institutional tools provided by the SPC to promote fairness in disability employment, particularly within the private sector. However, the courts' stance becomes more nuanced when employment discrimination extends to public agencies. When confronted with problematic recruitment standards set by governmental entities, the courts tend to apply a lower level of scrutiny, even though such discrimination can sometimes be more severe than that in private enterprises. This unusual judicial phenomenon should be understood within broader political and social contexts. In China's authoritarian regime, pursuing policy reforms through judicial expansion is possible only within the boundaries set by the state, a concept referred to as "quarantined justice" (Y. D. Wang & Xia, 2023). The judiciary's strategic efforts to combat disability discrimination are "quarantined" in private enterprises and cannot extend to government entities.

The “quarantined justice” manifests in two ways in dealing with discriminatory hiring standards of government departments. On the one hand, courts remain reluctant to accept employment dispute lawsuits where government agencies are defendants. According to a report on employment discrimination conducted by the Constitutional Research Center of China University of Political Science and Law (2011), governmental discriminatory cases often cannot be filed under the cause of employment discrimination or are even rejected by the courts in the filing proceedings. In theory, case filing serves as an initial stage to filter disputes, directing certain matters toward alternative resolution channels to ease the court’s caseload (Ng & He, 2017). In practice, however, due to the judiciary’s relatively inferior position within China’s bureaucratic hierarchy, the filing procedure functions more as a mechanism to exclude politically sensitive or socially contentious cases, thereby minimizing potential conflicts between the courts and government agencies. When higher political forces prefer that courts abstain from resolving certain disputes, courts have little autonomy to resist their directives. Such “dejudicialization” (Peerenboom, 2008) has been a common phenomenon during China’s unprecedented social transformation. Empirical studies have shown that, despite rising public demand for judicial roles, the overall increase in administrative litigation against governments has remained modest over the last several decades (J. Li, 2013). For instance, the SPC has issued a policy document to temporarily halt all collective tort litigation regarding security transactions, aiming to avoid conflicts with financial regulatory agencies (SPC, 2001). It also instructed all local courts to decline cases brought by rural villagers concerning the distribution of land compensation fees (SPC, 2020). As the allocation of rural land is intricately tied to grassroots power structures, courts seek to avoid escalating conflicts through judicial intervention and imposing additional burdens on local governance. Chinese judiciary is reluctant to adjudicate cases related to or against governmental bodies, as these cases are closely tied to the economic interests and political authority of local governments. A significant number of cases—such as those involving discriminatory recruitment within government agencies—are systematically filtered out from courtrooms.

On the other hand, even when cases are accepted in filing proceedings, courts are inclined to deny the existence of discrimination in government recruitment. In the cases of government recruitment discrimination filed by disabled individuals that we collected from the CJO database, not a single ruling identified employment discrimination by the government. Courts typically perform only formalistic reviews of the physical examination criteria, without substantively assessing whether they violate the equality provisions in LPDP, EPL, or the government’s obligations under the CRPD. For instance, the “first case of disability discrimination in civil servant recruitment” (*Xuan Hai v. Anhui Provincial Department of Human Resources and Social Security*, 2012) brought by a disabled candidate ended in disappointment. In 2011, Xuan Hai, a visually impaired individual (corrected version less than 0.8), applied for a civil service position in Anhui Province. Before the written examination, he requested reasonable accommodations from the organizer of the exam, Department of Human Resources and Social Security of Anhui Province, including a separate testing room, Braille test paper, and an electronic reader. However, on the exam day, Xuan was only provided with several magnifying glasses. He had no option but to give up on the test. Worse, the following year, he was disqualified by the government from taking the exam, simply because he had honestly disclosed his visual impairment during the registration period (Zhan & Yang, 2013). Believing he was discriminated against, Xuan sued the Anhui Provincial Department of Human Resources and Social Security. In the judgment, the court cited Article 21, Paragraph 3 of the Provisions on the PESCS, determining that Xuan belonged to the low vision group. It held that, since low vision could “potentially affect the performance of job duties,” the government’s decision to deem Xuan ineligible for the civil service exam was not found to violate relevant laws or regulations (G. M. Li, 2012).

In addition to government departments, discrimination against disability in other public sectors also struggles to gain judicial support. In China, medical and educational institutions are categorized similarly to government departments, and most of them directly adopt PESCS's stringent standards in recruitment. Lin Sen, a visually impaired individual, faced discriminatory treatment when applying for a massage therapist position at a hospital (*Lin Sen v. Rongcheng Bureau of Human Resources and Social Security*, 2014). Although he ranked first in both the written and oral tests, he was still deemed "unfit for the job" by the employer due to his failure to meet the PESCS vision requirements. The court, however, denied the existence of discrimination because of "insufficient evidence," without carefully reviewing the reasonableness of the physical examination standards or their relevance to the specific job requirements. Such discrimination is not limited to the recruitment proceedings but extends to unequal treatment of work benefits. Liu Qinghua, a person with physical disabilities, has worked at a college in Hunan Province for 17 years. Despite her long tenure, Liu never received equal remuneration, salary increases, or benefits enjoyed by other employees. She was even denied the opportunity to join the staff union by the personnel department of the college. In the same way, the court, again, rejected the claim of discriminatory work treatment, stating that the wage standards had been "agreed upon in the labor contract" and noting that Liu had not contested the wages during his many years of employment (*Liu Qinghua v. Hunan Women's College*, 2021).

5. Embedded Courts: Institutional Barriers in Governmental Discrimination Lawsuits

The "quarantined justice" indicates that the judicial power expansion finds its obstacles in addressing discriminatory practices within government recruitment. The stark contrast in attitudes toward private enterprises versus government agencies suggests the state established clear boundaries for judicial innovation, effectively confining them within "politically unthreatening areas" (Y. D. Wang & Xia, 2023). Within the permissible bounds, experimental innovations—such as enforcing disability equality standards within private enterprises—can be effectively implemented. These measures align with broader governance objectives without challenging core political interests, and may even improve the state's image as a progressive and equitable role. However, any judicial attempt to challenge government policies will be perceived as a threat to political legitimacy, which will be undoubtedly "quarantined" beyond the permitted boundaries. Such "quarantined justice" is rooted in the inherent "embeddedness" of the judiciary within China's bureaucratic system (Ng & He, 2017). As a significant conceptual tool in new institutional economics and economic sociology, "embedded theory" holds that the behavior of individuals and organizations is not isolated but significantly influenced by social networks, institutional foundations, cultural traditions, etc. (Polanyi, 1944). Specifically, "judicial embeddedness" refers to the complex institutional environments within which the courts operate. The decision-making structure of Chinese courts resembles an inverted funnel—as cases progress through the adjudication process, the scope of consideration expands from pure legal issues to broader non-legal factors (L. Li, 2023; Liebman, 2017), especially political and financial elements. The political and financial embeddedness constrains the courts' bargaining power with superior political bodies, significantly limiting their abilities to deal with governmental discrimination against disabled people.

The political embeddedness can be attributed to China's relatively closed institutional environment, which ensures that decisions made by senior political authorities remain unchallenged in the courts (Y. D. Wang & Xia, 2023). The judiciary is highly localized and cannot be separated from local politics and elites (He, 2017; Keith et al., 2014)—apart from the SPC, nearly all local courts are considered parts of local governments (Hou, 2019). Presidents of local courts shall be nominated by local Party committees before being formally

appointed by local people's congresses. Vice presidents and other regular judges will be then nominated by the presidents (State Council of the People's Republic of China, 2019). Given the symbolic function of local people's congresses (Keith et al., 2014), the substantive power to appoint judges lies in the hands of local political elites. Moreover, the daily management, work assessment, and reward and punishment mechanisms fall under the purview of local Party committees and personnel departments of local governments, making judges almost no different from government servants (H. L. Jiang, 1998). Deep political intervention has prevented the Chinese judiciary from developing independent operations, leaving it unable to challenge the discriminatory standards against disabled individuals of government recruitment. Financial embeddedness is another significant reason why courts are powerless to challenge discriminatory government policies. Under the special judicial-financial system in China, all local courts are funded by local government budgets, and the courts' daily operations depend on local financial support (He, 2007; Ng & He, 2017). Additionally, courts rely on material support from local governments such as land for courthouse construction, provision of utilities, and even infrastructure maintenance (X. X. Liu, 2022; Z. Liu, 2012). Any rulings that go against local political interests, including attempts to overturn discriminatory government regulations against disabled people, could potentially expose courts to a vulnerable position regarding their financial support. To secure essential funding for the operation, local courts must actively align themselves with key resource allocators and avoid ruling that governmental recruitment regulations are unlawful.

The unbalanced framework of power distribution is another cause of "quarantined justice" in disability discrimination lawsuits. Unlike their counterparts in some other regimes, Chinese courts do not possess the authority to conduct constitutional review of laws and government regulations. They cannot even directly cite equality clauses in the Constitution as a basis for their rulings (SPC, 2016). Constitutional review authority rests solely with the National People's Congress and its Standing Committee, though they rarely exercise this authority in practice (Pan, 2020; S. C. Wang, 2022). Such an unbalanced allocation of constitutional review power means that even when courts find that the hiring standards of civil servants violate the equality clauses of the Constitution, LDPD, or EPL, they cannot invalidate those discriminatory rules. Besides constitutional review, administrative litigation may offer another channel for courts to address discriminatory hiring standards. However, despite efforts in recent years by Chinese courts to expand their roles in administrative cases (He, 2013; Xiao & Ding, 2023; Yu, 2014), their power to challenge government authorities remains limited. Courts are only authorized to examine "specific administrative actions" of government agencies; "universally binding orders" such as recruitment policies and physical examination regulations issued by the government, fall outside courts' review scopes (State Council of the People's Republic of China, 2017). Therefore, even though recruitment regulations like PESCS are clearly discriminatory against disabled individuals, courts cannot directly declare them unlawful.

6. Conclusion: The Judicial Path to Uncompromised Diversity and Social Inclusion

This article provides a socio-legal analysis of employment discrimination against disabled people in China. In contrast to legislation-centered perspectives that attribute the failure to achieve integrated employment to the limited effectiveness of laws and policies, we argue that greater attention should be given to judicial institutions. Through proactively modifying procedural rules and issuing the Guiding Case, the SPC, China's highest court, has significantly expanded its discretionary boundaries, serving a key role in breaking systematic discrimination against disabled employees. To fulfill the requirements of Article 13 of the CRPD, the SPC has also taken proactive steps by ensuring effective access to justice for disabled employees.

In response, local courts have strategically leveraged institutional tools provided by the SPC to establish an inclusive and accessible environment. However, the expansion of judicial power remains “quarantined” to pursue further goals—the courts are not as effective in tackling governmental discrimination as they are in private-sector recruitment. Constrained by institutional embeddedness within China’s political hierarchy, Chinese courts lack the capacity to challenge discriminatory rules issued by governments. The rigid “one-size-fits-all” physical examination standards remain in most civil service procedures without considering the specific requirements of each position. This mechanical categorization based on health conditions effectively excludes most disabled candidates from government jobs, limiting their career opportunities and economic independence, exacerbating social inequality, and reinforcing their marginalization.

In the specific context of China, social, judicial, and political factors comprehensively shaped the landscape of social inclusion and solidarity. The “quarantined justice” has severely limited the impact of judicial actions in combating discrimination and achieving equal treatment for the disabled community. Such compromised diversity may further exacerbate the intersectional marginalization faced by disabled individuals, undermining social cohesion and diminishing the inclusive forces within society. However, the Chinese judiciary still holds substantial potential to eradicate structural discrimination against disabled people in the job market—provided that its innovative power expansion can extend beyond established political boundaries. The key to achieving disability equality lies in changing systems to support people, rather than changing the people to fit into systems. Empowering the judiciary to mitigate political and financial embeddedness is crucial for alleviating “quarantined justice” and building an inclusive, accessible employment landscape in China. Increased collaboration between courts and procuratorates may also be expected, with both institutions leveraging public interest cases to promote government agencies to recruit more disabled individuals. In a word, by shifting from a framework of mechanical solidarity that dismisses the work value of disabled people to one of organic solidarity that embraces diversity and inclusiveness, Chinese society can progress toward broader employment equality. The judiciary, with its capacity for innovation and self-empowerment, will play a critical role in this transformation.

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Conflict of Interests

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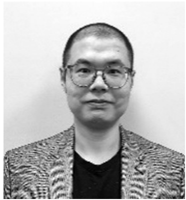

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ARTICLE

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The Dilemmas of Solidarity of Civic Activists: Supporting Displaced Ukrainians in a Non-Solidarian Regime

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Abstract

Civic actors working with marginalized and disadvantaged groups in society face various dilemmas associated with defining and, if needed, ranking human needs and vulnerabilities. Our article examines the reasonings for intervention in civic solidarity operations that emerged in response to the arrivals of displaced Ukrainians in Hungary in 2022–2023. Solidarians have strived to find spaces of action in an authoritarian regime that normalizes policy rationales of deservingness and social hierarchy in contrast to equality and inclusion-based diversity. We engaged with those solidarity actors who showed some degree of reflexivity to the wider social, political, governance, and charity activism landscapes considering their position and operational ethos. The mixed research methods generated ethnographic and discursive data that allow us to offer a practice-centered interpretation of civic actors' reasoning. This article explores the dilemmas that civic actors face when judging and prioritizing needs, responsibilities, and resources in comparing and contrasting the conditions of their own society and the situation of people with migratory trajectories. We identified three perspectives through which civic solidarity actors articulated their normative and strategic dilemmas: the origin and nature of the needs of the displaced people, the refugee assistance responsibilities thereby assigned, and the broader social care system in the host society. We offer insights into how solidarity actors discernibly departed from pure humanitarianism and deployed concepts of horizontal interdependence, anti-discrimination, and layered human rights, applying their own vocabularies.

Keywords

civic solidarity; defiance to authoritarianism; deservingness; normative and strategic dilemmas; social inequalities; vulnerability

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1. Introduction and Context

Reactions to migration and refugee policy challenges in European societies embrace various ideas in their design and justification of interventions, including deservingness, duty to care, and human rights. These frames link the notions of human needs, vulnerabilities, and solidarity responsibilities with philosophical, moral, and political arguments. Active citizens and organized civil society actors also engage in the production of these frames when they prepare and explain their solidarity actions at times of crisis or junctures in broader societal practices. These actors mobilize vernacular, professional, or mixed reasonings that react to and contest the regimes of truth that the political and policy realms promote. When civic actors prioritize solidarity interventions, they face the pressing dilemma of how to normatively assess needs on the one hand and the responsibilities and resources that they can mobilize and redistribute on the other (Bähre, 2022; Brković, 2023, 2024; Kreichauf & Mayer, 2021; Milan & Martini, 2024; Streinzer & Tošić, 2022).

It is critically discussed that European societies compassionately opened their doors to displaced people from Ukraine when the full-scale war against the country started in February 2022. This empathy extended to the citizens of a country whose cultural-historical proximity and geopolitical significance seemed starkly obvious in contrast to the plight of the Syrian asylum seekers in 2015–2016 (Cantat, 2022; Dražanová & Gonnot, 2023). Nonetheless, a few weeks after February 2022, the depth and scope of the solidarity and the distribution of assistance responsibilities provoked debate and struggle within the solidarity movements across Europe. The Hungarian government made welcoming political declarations concerning hosting refugees at the start of the hostilities. With some delay, it selectively mobilized state authorities and larger faith-based charity organizations to create logistical facilities for accommodating the refugees. Despite the government's openly pro-Russian foreign policy path and rhetoric, Hungarian society expressed significant support for the Ukrainian forced migrants (Zakariás et al., 2023), which remained relatively robust, even until early 2023 (GLOBSEC, 2023).

The post-February 2022 solidarity mobilizations aimed at supporting the displaced Ukrainians arose as a classical welcoming assistance but also a rapidly emerging migrant inclusion task. For a growing number of solidarians, stepping up at this migration juncture intensified various forms of activism they had experimented with and nurtured during the Covid-19 crisis and its aftermath or in other societal contexts. Our multi-year research endeavors have examined the intervention reasonings and practices in civic solidarity actions across three salient junctures of recent history: the 2015–2016 refugee arrivals to Europe, the Covid-19 pandemic, and the forced migration provoked by the fully-fledged war against Ukraine in 2022–2023. Our prime subject is the Hungarian solidarity scene required to navigate a dominantly authoritarian political and policy regime embedded in broader European political currents.

This article will center on the civic solidarity operations prompted by the arrival of the displaced Ukrainians in February 2022. It will explore the rationales that civic actors deployed to judge and prioritize needs, responsibilities, and resources vis-à-vis the conditions of their own society and of people of migratory trajectories. Most of the displaced Ukrainians did not view themselves as refugees despite the traumas of war, experiences of violence, or forced separation they endured. In this space, the nature, duration, and mutability of solidarity assistance have become the subjects of moral, political, and policy dilemmas. Some of these dilemmas are well known to any or most migrant solidarity spaces, whereas others are distinctive components of civic activism associated with a historically and politically specific configuration of actors,

paradigms, and power mechanisms. Our study contributes to the literature in three ways. First, it helps reveal that the seemingly unconditional welcoming of the displaced Ukrainians in Central and Eastern Europe embodied pressing dilemmas and debates even among the most dedicated civic actors. Second, our study calls for identifying the principles of social equality reasoning in civic solidarity rationales that the literature still often overlooks or unmasks as the humanitarian inclination to vulnerability. Third, our inquiry informs discussions concerning the conundrum of what counts as change, adjustment, or transformation in solidarity rationales.

This article kicks off with selective engagement with the literature and a portrayal of our research methodology. Then, we propose a conceptual framework to unpack the multitude of civic solidarity dilemmas and present our findings using three analytical dimensions. Finally, we summarize our conclusions and contributions to scholarship by highlighting the contingencies and tensions that civic solidarity work generates when it engages with authoritarian governance mechanisms while establishing and protecting inclusionary social spaces.

2. Conversations With the Literature

Renowned scholars of austerity and neoliberal crisis reactions in societies in Europe and beyond propose that contemporary non-governmental solidarity actions react to the precarities associated with neoliberal social and political structures (Muehlebach, 2012). Scholars of critical humanitarianism have shown that compassion is not unconditional, and discourses and policies of humanitarianism legitimate certain categories of sufferers who deserve aid and assistance (Malkki, 2015; Streinzer & Tošić, 2022; Ticktin, 2011). In cognizance of these caveats, other voices argue that many civic solidarians constitute their practices by contesting the non-symmetrical power relations of liberal humanitarianism, articulating political agendas, and striving for structural changes in society rather than fixing problems (Lahusen et al., 2021; Milan & Martini, 2024; Rakopoulos, 2016). Civic solidarity acts often substitute the infrastructures and services that society expects from the state. While their strategic entrenchment creates zones of temporal autonomy from state governance, they also negotiate the terms by which essential state services are to be provided (Trémon, 2022). Consequently, solidarians intervene in conditions of exclusion, domination, and discrimination in societies that they often challenge and interrupt (Fleischmann, 2020). Some civic solidarity actors (Agustín & Jørgensen, 2018; Feischmidt et al., 2019; Schwiertz & Schwenken, 2020) advocate for the transformative ideals of social justice and engage with the epistemological and ethical dilemmas of the classical liberal and post-liberal political concepts of human rights, inclusion, and fairness in migration settings (Bauböck et al., 2022).

Three further streams in the literature appeared to be theoretically relevant to our current inquiry: one unveils the controversies of deservingness judgments in migration settings and a radically different rationale of relational care, the second examines the tensions of solidarity rationales that dwell on the present and future, and the third addresses the distribution of caring responsibilities, particularly in authoritarian political and policy contexts.

Regarding the first stream, welfare studies and migration research offer vital insights into how the notions of vulnerability and deservingness are discussed in clustering and managing people. The influential thesis of van Oorschot (2000) suggests that members of society (in developed welfare regimes) apply five specific criteria to assess who deserves welfare. Accordingly, groups are seen as more deserving if they are

considered not to be in control of their neediness, have a grateful attitude, are able to reciprocate, have an identity closer to "us," and are in genuine need of support. Both supporters and critics of van Oorschot reveal that assemblages of the proposed deservingness components show major variation within and across polities, contexts, and situations (Carmel & Sojka, 2021; Ratzmann & Sahraoui, 2021), and judgments are relational, conditional, and mutable (Willen & Cook, 2022). The scholarship also has shown that degrees of deservingness contribute to creating hierarchies between and within groups of mobile people and stratifying their access to resources (Ratzmann & Sahraoui, 2021; Welfens, 2023). Dominant frames balance the requirements of the victim's passivity and expected agency, a typical outcome of which is the lens of "promising victimhood" (Chauvin & Garcés-Mascareñas, 2014). Contrasting and shifting deservingness conceptions construct complex boundaries of inclusion and exclusion that migrants must navigate.

A recently emerged direction in the literature, although one with important antecedents, uncovers that civic solidarians also contemplate their duties, motivations, and capacities from the perspective of caring relations. Thanks to critical humanitarianism, social movement studies, and feminist scholarship, duties of care that extend way beyond sympathy and moral righteousness are understood. Care is conceived as a social system in which state, communities, families, and profit actors all take part with differential motivations and responsibilities (Woodly et al., 2021). Further, in reflection of recent crisis reactions (post-2008 economic, refugee, Covid-19), the notion of care has become the subject of politically salient vernacular sense-making among citizens and civic actors. Ticktin (2024) describes how "new enactments of care have pushed a reevaluation of the concept" that goes beyond the temporality of crisis and reworks the traditionally hierarchical power dynamics of solidarity. Assisting others involves popularizing and strengthening horizontal and reciprocal relations among carers and the cared-for and facilitating the expansion of new ethical grammars of engagement. This horizontal and relational understanding of caring for others radically challenges forms of deservingness-based reasoning.

The second stream of scholarly thought we engage with examines the modalities of migration and refugee solidarity rationales regarding the depth and temporality of social and political changes they advocate for. Korteweg et al. (2023) investigate citizens' refugee sponsorship in the framework of a state-sponsored resettlement program in Canada and reveal the formation of humanitarian reasoning and its adjustments. The observed settings allow citizens to enact actions that are neither humanitarian governance by the state nor "vernacular" against, or in the absence of, the state (Korteweg et al., 2023, p. 3962). As humanitarian aspirations evolve in time and respond to various moral and practical challenges, the main protagonists enter into a tacit "humanitarian bargain." They initially act upon their convictions of solidarity with little or no expectations about the behavior of other actors, including fellow citizens, assisted refugees, and public bodies. But over time, they contemplate the attitude, contribution, and cooperation drives of other actors who are involved. The authors conclude that this citizen activism does produce reflexive civic conduct but remains within the remits of humanitarian reasoning even if the solidarians move from the reactive task of saving strangers to the proactive future-oriented task of making citizens (Korteweg et al., 2023, p. 3960). The scholars argue that the notion of a "humanitarian bargain" unveils both the impact of temporal and relational dynamics in enacting humanitarianism in a programmatic context.

Vandevoordt and Fleischmann (2021) examined solidarity mobilization in Belgium and Germany in the aftermath of the Syrian war and the 2015 refugee arrivals to Europe. Compared to the above-described programmatic settings, the subject of the inquiry here was a diverse civic space of multiply positioned actors.

The researchers found that civic actors faced the temporal dilemma of reacting to hostile political environments in the present and their grave humanitarian consequences while directing their endeavors towards creating an alternative future involving more structural social and political change. This entailed that the civic actors had been aware of this dilemma from the outset, constantly struggled with it, and made a major compromise: They prioritized migrants' immediate needs in the present but did not give up their vision of the migrants' structural inclusion. However, this temporarily put their efforts for a better future on hold. In sum, with some notable variations, grassroots initiatives in both Belgium and Germany developed strategies of (re-)appropriating and enhancing their scope of acting towards their desired future.

The third larger body of knowledge we rely on unveils that refugee solidarity actors, in their norm-setting discussions, reflect upon domestic social policy regimes and, by doing so, conceptualize responsibilities, institutional protocols, and fairness outcomes of care as a social system. Civic actors acknowledge, debate, and intervene in inequality relations as intermediaries between the domains of practice by informing and nudging public officials and institutions (Piccoli & Perna, 2024). Forms of "subversive humanitarianism" redefine specific categories of recipients based on vulnerability, contesting the understandings of deservingness and actively reacting to flaws in government policies (Vandevoordt & Verschraegen, 2019). This solidarity "from below" strives to overcome forms of exclusion across native and migrant members of society (Schwiertz & Schwenken, 2020), enacts alternative spaces against humanitarian machines, expresses outrage at structural injustices, and advocates against xenophobic rationales and narratives (Ambrosini, 2022). Grassroots organizations often go beyond the humanitarian concerns motivated by discontent or outrage with unwelcoming policy regimes. Their active refugee-assisting work often "prefigures" a world in which freedom of movement, health rights, and equal opportunities are respected. Their normative ethos stands at odds with the border protection mechanisms that discriminate against people because of their passport or skin color (Milan & Martini, 2024).

A number of scholars are exploring civic-solidarity-related normative discussions in authoritarian governance regimes that promulgate narratives of social hierarchies and enact specific "moral common senses" (Streinzer & Tošić, 2022, p. 4). In Central and Eastern Europe, authoritarian versions of neoliberal governance paradigms have gained traction since the early 2010s, although unevenly across the region. Hungary stands out as a textbook example due to its tight control of public resources, diminishing of autonomous spaces, and management of social services by combining xenophobic, racializing, homophobic, and productivist narratives to separate groups in society, rendering redistributive decisions accordingly. In addition, deservingness-based social policy mechanisms intensify the outcomes of a globally entrenched political economy (Fodor, 2022; Scheiring & Szombati, 2020). The societal landscape is polarized by political loyalties, social networks, and dependency relations. The most pronounced divide, even if not always manifested in visible spatial segregation, is between the Roma and non-Roma groups of local societies (Feischmidt & Szombati, 2017).

Finally, our current research agenda interacts with an important conversation in the wider scholarship that cuts across the problems addressed above. Several scholars agree that "there is nothing inherently progressive to grassroots assistance as compared to state support or the formal aid sector" (Cantat, 2022). The former initiatives enact their own politics and ethics and often follow unexamined desires to do good and informally support unequal power relations. Others acknowledge civic experiences that enact longer histories of struggle that can "interrupt and reconfigure the dominant political order" (Nyers, 2024). These struggles are "refusals"

or resistance to power practices that exclude categories of people from claiming rights and access to the basic conditions of life (Nyers, 2024). We will reflect upon this debate in the literature in our conclusions.

3. The Analytical Lens and Research Methodology

For mapping the migrant and refugee civic solidarity scene, Ambrosini (2022) identifies four groups of actors: NGOs and other specialized third-sector organizations working with professional staff, civil society organizations embracing a mix of professional and volunteering personnel, social movements originally coming from a background of radical political engagement but also involved in hands-on assistance, and citizens, mostly locals, without an organized background or explicit political or religious engagements. The solidarians we examined belong to one of the last three groups according to this classification. In the context of the full-scale invasion of Ukraine in 2022–2023, these actors, while organizing and intensifying their relief efforts for the displaced people, positioned themselves within the web of solidarity assistance responsibilities in the respective domestic context and assessed the broader socio-political environment and the ways it shapes the conditions for pursuing a decent life for all. These solidarians used conceptualizations informed by their previous civic activist experiences, debates, and struggles among themselves and with various powerholders, and often contentious engagements with the wider public, which was far more interested and involved in refugee support than in 2015–2016.

We propose a triadic analytical scheme to explore the bundles of civic actors' solidarity dilemmas. The idea of these three pillars has evolved through our empirically and conceptually connected investigations into "crisis events" and the solidarity reactions to those since 2015, as well as other multifaceted inquiries that our larger research team has conducted on civic actions (CSO, movement, citizen) reacting to the social consequences of strengthening authoritarian governance in Hungary. We identified three perspectives concerning normative and strategic considerations through which civic actors articulated various priority dilemmas, decisions for action and inaction, and justified these decisions for themselves, for their constituencies and alliances, and for the wider social environment, thereby forming concepts about human needs, assessing caring responsibilities, and reckoning the inequality conditions of their own society. These perspectives were ingrained in practices, temporalities, and rationales of refugee solidarity work by no means unique compared to other refugee solidarity arenas yet specifically shaped in the given historical-political context:

1. Solidarians acknowledged the *variety of refugees' needs* that originated in forced migration, as well as pre-established and portable disadvantages that displaced people had, complicated by their paths in the host society's welcoming structures. We examine the relational, contentious, and mutable formations of vulnerability concepts that tailor various solidarity rationales, especially those that go beyond the traditional humanitarian drive of reducing suffering (Chauvin & Garcés-Mascareñas, 2014; Ratzmann & Sahraoui, 2021).

2. Solidarians constantly assessed the fair and effective division of refugee *assistance responsibilities* and the adequacy of the broader care provisions in the host society. In so doing, they positioned themselves among different actors and adjusted their action frameworks. We highlight those dilemmas that civic actors articulated when sharpening their role in forced migration contexts intertwined with the broader system of social policy and governance (Ambrosini, 2022; Schwiertz & Schwenken, 2020; Ticktin, 2024).

3. Solidarians reflected on the production and experiences of *social inequalities in the host society* that precede and undergird the formation of solidary agendas and practices concerning the displaced. Our interpretation captures experimental, resilient, and reconciliatory visions of civic operations in exclusionary and authoritarian regime contexts (Feischmidt & Szombati, 2017; Tošić & Streinzer, 2022; Zentai, 2019).

At the conjunctions of these three perspectives, solidarity actors connected their dilemmas and formed ethical, professional, and often politically salient positions from which they reflected upon their and other actors' practices. In exchange, immersing themselves in thick practices inspired the solidarians to tinker with and shift their initial dilemmas. As our discussion will reveal, the concepts of vulnerability, inequalities, and the conditions for human flourishing often resonated with dilemmas that the solidarians encountered in other fields or former crises. At the same time, the forced migration mobility path embodying distance from the homeland, involuntary separation from family members, and uncertainties of return or moving further away, twisted and sharpened the solidarians' conceptions of human needs.

We conducted 40 semi-structured interviews in total, including 28 with civic groups, civil society organizations, and (non-privileged) faith-based activists active in the capital city and rural municipalities. We also carried out ethnographic observations in two Budapest municipal districts and four rural regions. We explored bottom-up solidarity mobilizations and examined the rationale of these civic groups and how and whom to support. The inquiry that we pursued resembles what others consider a phenomenological approach (Piccoli & Perna, 2024): It involves seeking, collecting, and interpreting the experiences of conceptual and ethical dilemmas that civic actors face by "illuminating the meanings that they attach to specific values and principles, and relating these understandings to the lived experiences of the actors in the field" (Bauböck et al., 2022, p. 435). We captured sense-making formations by relating solidarians' words, reasonings, action priorities, and choices. Our empirical observations stretched over the year 2022 and partly 2023. This entails that we were able to capture solidarity practices in a period that embodied tumultuous humanitarian moments for a short period and then quickly embraced multiple temporalities of forced mobility and welcoming assistance. New groups of displaced Ukrainians arrived, and others started to move back and forth or settle in the host society of unknown duration. The tasks of "saving lives" and "shaping lives" overlapped and fused for solidarity missions (Korteweg et al., 2023).

4. Solidarity Dilemmas in Three Perspectives

4.1. Concepts of Refugee Vulnerabilities and Needs

Most solidarity actors shared two fundamental experiences, especially in the early weeks of the war against Ukraine in 2022. One, they identified everyone arriving from any locality of war-torn Ukraine, especially by train or walking through the border crossing, as a victim of war, creating an unambiguous call for action. Two, many solidarians also noted special properties and situations among the displaced people, such as ability, age, gender, health, and parenting responsibilities, which required differential attention to human needs. This attention occasionally remained close to common sense or humanitarian ideals: "We recalibrated our beneficiary register by zooming on those who are the most vulnerable and need long-term assistance, such as those caring for small children and disabled. We constantly adjusted our register and our priorities" (An experienced solidarity actor, Budapest). However, the categories of gender and age, regularly identified

in the literature as the grounds of undue differentiation by humanitarian hierarchizing (Welfens, 2023), called for another type of consideration by the activists. Most of the solidarians whom we talked to approached the situation of displaced women through their care duties for the elderly and children—that is, as active social agents whose duties were not suspended in the asylum situation. Further, first, it was not obvious yet did not take too long to acknowledge why Ukrainian women resisted being sheltered by single-man households. Horizontal discussions helped the solidarians obtain knowledge about gender-based violence in war and the heightened risks of human trafficking in times of displacement. Most solidarians in our sample came with some preliminary knowledge or acted with a propensity to quickly learn about the complex gender relations in asylum situations, whereas a few remained with their humanitarian compassion towards women and children.

Concepts of refugee needs were also shaped by solidarians' concerns with other types of social inequalities in contemporary liberal or post-liberal capitalist societies. For example, for a housing support organization, clustering refugee needs resonated with inequalities anchored in household income and social network capital that fundamentally tailors one's chances of obtaining decent housing. This housing support organization was one of many advocacy groups that deepened their accumulated knowledge of marginalizations and multiple discriminations in contemporary societies through the new asylum situation. Their lead activist explained:

> We provide housing support for low-income people, and we expanded our understanding of intersecting forms of discrimination triggered before and during the Ukrainian refugee crisis. We acknowledged that people arrived who were specifically vulnerable in their home conditions.

Others, even without background knowledge, quickly grasped the nature of some portable vulnerabilities among the displaced, such as the small pensions of the elderly in Ukraine and unmet medical needs, all aggravated by the war and refugee journey. Thus, displacement needs were complicated by already existing *income and class inequalities* about which solidarians either acquired knowledge through their preceding activities or rapidly increased their insights during solidarity mobilizations through horizontal conversations with peer actors.

Assessing the asylum-specific needs in relation to the displaced people's past and present access to resources was complicated by citizenship differences among the displaced from Ukraine. Several people of Hungarian ethnic background possessed dual Ukrainian-Hungarian citizenship before the war of 2022 with various privileges associated with healthcare, property, labor, and political rights (as an electorate expanding provision of the ruling regime of Hungary). Due to this status, these people did not become eligible for temporary protection status and its benefits when crossing the border as displaced. This puzzled the solidarians as they faced people with immediate asylum needs but who were known to have obtained citizenship privileges and resources. The social networks and household reserves mobilized by those of dual citizenship solved most of this puzzle outside of temporary protection resources, except for the Transcarpathian Roma.

Most solidarity actors also acknowledged that the displaced people from Ukraine also differed according to their *racialized ethnic backgrounds* imbued with multiple forms of vulnerability. Two groups of this sort arrived at the refugee support spaces of Hungary: Roma, most of whom were Transcarpathian Roma, and third-country

national foreign students displaced by the war. The latter group, arriving in relatively small numbers, got basic humanitarian support from the most human rights-conscious civic groups in the capital city, and most of them left the country. The Transcarpathian Roma were met with suspicion or even abject rejection by the host public, cynical abandonment by the Hungarian state authorities, and mixed responses by faith-based humanitarian giants. These Roma became the prime targets of the deservingness test for the majority public. They appeared as inapt economic migrants with undeserving claims or a racially inferior group whose claims should not even be judged through a deservingness test, or both.

Several civic groups specifically dedicated themselves to saving those who became targets of direct racial discrimination in the refugee assistance domains: "You want a reasonably decent shelter as a Transcarpathian Roma family? What can we tell them in the first place? That you have chances similar to a Hungarian Roma family minus 10%"—the challenge was thus characterized by a Budapest-based activist. Responses called for not simply acting upon inclusive civic and political imaginaries but understanding needs derived from upfront discriminations or outright rejection. This resilience characterized several solidarity actors in other parts of Europe in the 2015–2016 refugee-supporting mobilizations but only later became widespread and visible in the solidarity circles in this part of the world. For example, a local hotel owner in a rural settlement in Eastern Hungary agreed to host several displaced families and learned of their Roma background only upon their arrival. He and his family provided shelter and additional assistance with deep compassion. This solidarian, far away from the sophisticated civil society groups in the capital, had never ventured to help the marginalized Roma prior to the Ukrainian war. He admitted:

> The reality knocked at the door when two large Roma families arrived together, carrying their full lives in few bundles, including a mom with a small baby and a woman eight months pregnant and many children. What could I do when I saw the despair and the fear of rejection in the eyes of those at the doorstep?

Acknowledging the manifold vulnerabilities of the Roma and specifically prioritizing their support became a proactive *reversal mechanism* against deservingness selections and undue differentiation in refugee assistance. The widespread atmosphere of antigypsyism and xenophobia in the Hungarian public made this act particularly daring and connected the ethical position of the capital city civil society organizations and the ad-hoc local solidarity actors in rural settings.

In sum, the selected solidarians' rationales involved noticing vulnerabilities generated by forced migration as part of the condition universal to all people exiling Ukraine due to the war. Differences among these immediate needs were captured through elements of genuine inequality thinking, although some humanitarian norms of seeing women, children, and the disabled as having greater human needs by default remained a source of inspiration for some civic actors. The majority of the civic solidarity actors did not use a human rights language but were motivated by an understanding that resonated with the principle of human rights. Accordingly, rights are not to be deserved and conditioned by any property of the person and are not tied to the future contributions or proper behavior of the supported people. When presenting this interpretation, we acknowledge that our sample was biased as we sought civic actors who showed some autonomy and devotion to inclusive practices despite their diversity in history, location, resources, and mission. We also concede that the initial conviction of detaching refugee needs from "proper behavior" and future productivity became weakened when the support of the local social public declined over time.

Further, we also noticed some signs of cracking in the solidarity rationales when civic groups' resources gradually dried out towards the end of the first year of mobilization. The more resourceful of the displaced took advantage of the inclusion potentials or returned to their home country, and the most vulnerable remained in the solidarity practices.

4.2. Responsibilities in Refugee Assistance and Social Care Systems

The very same actors who assessed the refugee needs by examining the arriving people's portable conditions and situational vulnerabilities actively reflected concerning what responsibilities should be assigned and performed within the broader set of social care systems in the host society. Two larger distinctive and intersecting fields composed the wider domestic environment of solidarity actions in the context of the Ukrainian war: the refugee reception system and general social welfare provisions, including education, health care, housing, and social assistance. The solidarity actors in our inquiry reckoned the responsibilities of the state, municipal governments, larger faith-based charity organizations, the diverse civic arena, and international organizations as part of their everyday practices and wider strategic decisions. In this section, we limit our attention to the expected duties of the state and the civic actors, as well as their contentious relations.

The first overwhelming experience for all civic helpers was poor state performance in establishing a transparent and adequate refugee arrival infrastructure, which was largely dismantled after 2016. The central state authorities became visible only after a whole month of absence when they took over the arrival assistance coordination from the civil solidarians. They also started to act behind the scenes to engage the larger faith-based humanitarian organizations and local governments in a highly selective way. Most solidarians acknowledged that the state had failed to perform due diligence and abandoned the displaced people despite or exactly because of the actions taken by civic groups: "It was stunning that civic and local government actors put their heads together and tried to figure out what the central state authorities would do. We were scratching our heads and guessing"—this depicts the shared experience of civic solidarity actors in the capital city. Solidarians felt outraged that the state authorities were neglecting their duty to protect the elementary well-being and safety of the displaced. Solidarians were also spurred into action by the negative experience emerging from the systemic selection mechanism that differentiated the deserving and non-deserving refugees we fleshed out in the preceding section. The state authorities turned a blind eye to the fact that individual volunteers and larger humanitarian organizations often avoided hosting any displaced Roma.

Against this backdrop, several ad-hoc citizen groups, established civil society organizations, faith-based grassroots, and some professional not-for-profit human-service (e.g., trauma counseling) entities formed a nearly autonomous and loosely coordinated arena. Beyond the common ground of resentment toward the non-transparent state-backed initiatives, these actors embraced differing initial inspirations (moral, professional, faith-based, political, etc.) and had variegated knowledge about refugee contexts and solidarity organizing. Civic actors acknowledged that they were tailoring their missions in a crisis that had originated partly in forced migration and partly inept state reactions to that. Many developed a concern that their resources and knowledge would allow them to pursue limited interventions, yet the moral call to substitute underperforming state institutions by stretching their means was pressing. This puzzle motivated several solidarians to deepen their diagnostic accounts regarding vulnerabilities, marginalizations, and intersecting

inequalities. Further, they squeezed their human and material resources to offer immediate support, which often enacted separate, resource-poor, and fragile welcoming solutions.

Among the solidarity actors, one group emerged with widely acknowledged agenda-setting and professional authority stemming from decades of experience in migration support. When the massive civic mobilization kicked off, this group embarked on capacity building for civic groups and municipalities. The group's lead activist unveiled the following about the challenges:

> From day one, we were under a lot of pressure to find the right way to help. Crisis management and integration tasks came up simultaneously. It is difficult to reconcile compassion, sympathy and professional help.

This disclosure mirrors the tension between the need for knowledge and competence building and the call for immediate solidarity action, respectively, among those civic actors that started to stretch, enhance, and multiply their capacities and outputs driven by outrage at the state authorities' poor services and selective approach.

Despite their dedication to solidarity, civil society activists often lacked specific expertise to handle the intersectional and multiple inequalities that their target groups manifested. Some leading Roma organizations, backed by international donors, stepped in to sensitize the old and new civilian helpers to work with Roma refugees. An experienced Roma organization working on higher education and empowerment mobilized its Roma experts and student mentees to work with civic groups and help them understand the specific needs of Roma from Ukraine. As the lead of the organization put it:

> What we are doing now is mostly trying to offer expertise to civic initiatives that deal with Roma children from Ukraine. Because what we see from the beginning is that there are well-meaning, enthusiastic NGOs, but they haven't necessarily worked with Roma target groups.

The Roma civic groups believed that solidarians needed basic marginalization sensitivity to understand the needs of the Roma. But they also viewed solidarity operations as being imbued with structural racism inadvertently practiced by civic actors. These civic actors felt unease being seen as contributors to a racializing social assistance system while making extraordinary efforts to revolt against racism. The dilemma of working with a refined sensitivity to a specific inequality problem while not yet knowledgeable enough in another one is a classical intersectional challenge for any social assistance or solidarity work. In this context, where the most dedicated actors felt challenged or abandoned by many other powerful actors, the intersectional dilemma poignantly hit and hurt some civic actors.

As time passed and everyday inclusion needs moved to the forefront, the solidarity actors faced widespread frailty and shortages associated with the general welfare infrastructure of the host society, most importantly in healthcare and education. In these domains, as opposed to housing, citizens' voluntary resource sharing could not substitute for scarce or inaccessible provisions. A case in point is that, in the fall of 2022, all public schools were obliged by a bureaucratic measure to enroll Ukrainian children, with no material and pedagogical support. Some school principals simply refused to take refugee children due to the language barrier; others let the displaced children enroll and survive without any assistance. Several civic solidarians

repurposed their experience of working with marginalized children and vocally claimed all children's rights to schooling and offered pedagogical and mentoring assistance. These examples revealed that the civic solidarity actors confidently took the task of *nudging* and directly assisting reluctant or unprepared public service institutions.

In addition, solidarity actors not only substituted poor services but assisted in unpacking *non-obvious configurations* of needs and service provisions. Several collective educational initiatives popped up among the solidarity actors, the Ukrainian refugee community's self-organizing volunteers, and alternative and church-based schools. These actions embodied professional and lay discussions and conceptual compromises among the involved actors regarding the universal and differential aspects of Ukrainian children's educational needs. The language of learning, the current and future location of the displaced families, multiple senses of belonging, and children's learning development prospects often suggested ambivalent or contradictory considerations concerning which education programs and institutions could provide the best environment for Ukrainian children.

In sum, the host society's authoritarian policy regimes (with neoliberal cues) regarding the refugees and their civic helpers magnified some of the dilemmas that the solidarians faced, which we address in the previous section of the article. Disconnecting and, in many respects, abandoning state services intensified the urgency of dwelling on universal human needs as opposed to paying more refined attention to needs driven by various inequality divides among the refugees. Further, temporary problem-solving and service provision by civic actors outside the regular public mechanisms did not always enhance the displaced people's possibilities for claiming equal conditions to pursue a dignified life, as found in other solidarity contexts (Piccoli & Perna, 2024). Finally, some of the civic actors became involved in conceptualizing needs in a transient trajectory of life when return to one's homeland is still hoped for and actively sought. The latter concerned the less vulnerable, somewhat or fairly resourceful groups of displaced Ukrainians. With this, solidarity actors' dilemmas started to be separated, at least to some extent, according to the target groups and their ethnicized/racialized class divide.

4.3. Understandings of One's Own (Host) Society

Solidarians' internal discussions embraced the dilemma of how to reckon and prioritize their solidarity capacities to serve the displaced Ukrainians in view of the pre-existing conditions and struggles for well-being and inclusion in the host society. Those who had a track record of solidarity work felt the moral drive to balance their attention and commitment to social groups both with and without mobility paths. Seasoned activists worked with already acquired knowledge of the domestic social structures that put some groups in their own society in dire need of solidarity assistance, whereas ad-hoc groups largely formed their accounts of host society configurations through situational sense-making.

It is not uncommon in Europe that populist governmental ideology apparatuses promulgate polarized visions of societies composed of productive and non-productive and worthy and unworthy citizens, families, and groups. In Hungary, this has developed in relation to an overarching authoritarian governance that operates social policy systems through deservingness principles (Bartha et al., 2020). Those who deserve recognition and resources have certain demographic, economic, and moral capacities, as well as ethnic and cultural identifiers. Further, workfare and pronatalist distribution mechanisms intensify the outcomes of a political

economy weakly protected from global economic currents. The intermingling effects translate to a society polarized by ethnic, class, educational, and spatial divides. Some municipal actors in smaller cities and villages strive to create spaces of reasonably shared local welfare. Elsewhere, the local dependency relations seriously limit municipal actors' scope of action. Civic actors go against the mainstream deservingness governance climate despite receiving modest moral, professional, and material support and are often forced to suspend or give up their resilient activism.

Socioeconomic precarization and Roma marginalization, often intersecting with or posited against each other, stood out as the most pronounced source of inequality in the host society. Most solidarity actors we examined had refined understandings of marginalization and multiple discriminations against the Roma and also acknowledged that many non-Roma face socioeconomic vulnerabilities. Given the widespread racial deservingness trope in Hungarian society, those solidarity groups who framed their refugee support acts in line with the mission to protect the marginalized Roma often faced adversarial reactions from the general public. Most civic actors reacted to this challenge by using broad anti-discriminatory reasoning in their public communication by remaining low-key about their sharpened attention to the refugee Roma. This was done assertively and in "good conscience": The subversive solidarity rationales became intertwined with strategically packaged public messaging.

Several grassroots groups in smaller cities and villages, sometimes in alliance with local governments, had worked as active agents in tackling socioeconomic marginalization in their local communities long before the full-fledged war against Ukraine. When the displaced arrived, some local leaders reconciled needs and limited resources among different constituencies by unapologetically channeling the refugee donations to the local needy and later by adjusting locally managed social service institutions to the ever-increasing needs. Cooperation between a mayor of a smaller village and local civic volunteers led to this reasoning:

> We need to be accountable to local citizens, who also face poverty and precarity widespread in this micro-region. We need to demonstrate that helping one group does not take away from the other one. We believe that we have managed to strike a good balance but this balance we have to maintain day by day.

This strategy reveals that local communities did not offer unconditional compassion for refugee solidarity work but also that solidarians anticipated this attitude and did not expect perfect fairness. Instead, a vision of *shared local solidarity* was promoted involving practical distributive compromises and non-ranking inclusive public talks.

Another pressing experience challenged almost all solidarians. Societal groups with backgrounds of some existential security or stable socioeconomic status largely shared the official regime imaginary, which holds the precarious responsible for their own conditions and considers exclusions as the normal functioning of society. These groups became enthusiastic about supporting the displaced from Ukraine as opposed to supporting the local marginalized. For example, an experienced and knowledgeable civil society organization struggled to work with compassionate citizens who shared or temporarily opened their housing facilities to the refugees: "These citizens who participated in hospitality for the refugees would never consider doing the same for the local needy." Other solidarians developed a lucid view that the needs of the host society and the displaced cannot be easily compared, let alone publicly discussed, due to complicated, intersecting, and

polarized experiences of marginalization. Therefore, they opted to craft their own fairness rationales according to their best judgment and adjust them from situation to situation.

Over time, another contentious inequality problem provoked perhaps the hardest challenges for the solidarity workers in urban settlements in which host society cleavages and the refugee hospitality spaces intermingled. In addition to the Roma, homeless people are the other main stigmatized and vilified marginalized group in Hungarian society. Most Ukrainians (who, anyway, did not consider themselves refugees) were not willing to share facilities with the local homeless or even relate to solidarians working with the former. In turn, the beneficiaries of civic groups working with housing, poverty, and homelessness in the host society felt unfairness and expressed anger about the solidarians: "The local vulnerable who lined up for our assistance got seriously annoyed when learning that we also help the displaced Ukrainians"—a housing activist revealed. Our fieldwork only allows us to signal that some civic groups noticed and engaged with further linkages of inequalities in the host society and among the assisted migrants. Among the homeless, there are several refugees from earlier migratory waves from outside of Europe, even if their absolute number is relatively small due to Hungary's highly selective international refugee assistance.

In sum, solidarity actors also conceptualized the unmet refugee needs through reckoning marginalized positions in their own society. Solidarity actors were most articulate about the marginalized who endure precarity exacerbated by spatial segregation and housing deprivation, both the Roma and the non-Roma, and increasingly the fragile elderly. From February 2022 on, solidarians mobilized for refugee assistance by adapting their already established categories of vulnerable groups and needs and proactively inviting and placing the displaced from Ukraine in those solidarity spaces they had already established. This emerged as both an ethical and strategic dilemma concerning how to strike a compromise between effective mission delivery and taking a principled stand in public when the solidarians rely on resources partly offered by those in the mainstream public whose values they contest.

5. Discussion and Conclusions

The forced mobility juncture we examined encouraged solidarians to either rapidly surpass humanitarian approaches or combine them with others from the outset. This does not necessarily protect solidarity relations from some deservingness expectations, but the refugee-welcoming actors showed deep interest in delving into the conditions of social inequalities. Therefore, we argue that the solidarian accounts embodied both the objectives of "saving lives" (humanitarian assistance) and "shaping ways of lives" (promoting inclusion) (Korteweg et al., 2023), clearly tilted to the latter. For the solidarians, shaping lives in the post-2022 asylum context in Hungary entailed shaping conditions of lives in wider societal configurations and beyond the immediacy of the present. The cognitive, ethical, and political thinking process that the solidarity unleashed embodied conceptual dilemmas and horizontal learning often in defiance of the wider public concerns and official policy rationales.

We have revealed that a dedicated, although differently resourceful and vocal, circle of solidarians viewed forced migrant situations as temporary or an add-on to the conditions that shaped the displaced people's placement in contemporary societies. This complex account had been formed by centering on the present but in view of future possibilities for a dignified life for the displaced and for transforming structural conditions to tackle social problems. The literature that explores the dynamics and trajectories in civic

solidarity rationales often captures that solidarians move away or reflexively relate to their humanitarian common sense and practices (Korteweg et al., 2023). The strategic compromises that our examined solidarians forged resonated with what Vandevoordt and Fleischmann (2021) found in other parts of Europe in an earlier round of refugee solidarity mobilization. In both settings, civic actors faced the temporal dilemma of reacting in hostile political environments to refugee needs in the present while also directing their endeavors toward an alternative future involving structural change. Their strategic compromise gave priority to present needs while not giving up their drive and vision for acting for the future. Our research results also highlight that the postponement of these transformative ideas is not fully complete: Some solidarians have broken the strategic compromise and launched principled actions to make genuine changes in the present. And they have often failed. The intentional use of the present perfect here acknowledges that these endeavors had not stopped by the end of our inquiry.

Civic groups assisting the displaced people from Ukraine were inspired to some extent by preconceived imaginaries of suffering stressed by standard humanitarian reasoning. However, most of them conceptualized social categories to address inequality conditions and identify the subsequent human needs in asylum circumstances. Solidarians acknowledged that universal human rights and capacities to flourish should be linked to the structural conditions in society and even the access to universal human rights will perpetuate inequalities for certain groups and categories of people. Therefore, differences in people's initial social positions should be addressed to deconstruct structural inequalities in society. Steps towards embracing this principled thinking about social justice departed from a rudimentary moralizing about "women and children" (Welfens, 2023). With a sharpened analytical eye on the solidarity dilemmas, our inquiry hoped to enrich the literature on civic solidarity: It is essential to acknowledge the solidarians' capacities to assess the relevance of *social categories and groups* without any major background in philosophy of justice or policy theories to conceive of solidarity interventions as based on the differential treatment of people concerning the *equality of results*.

It is tempting to consider if the formations of solidarity dilemmas by the civic actors in the Hungarian post-2022 refugee assistance scene can be seen as idiosyncratic in any sense. Solidarians acknowledged that the refugee-welcoming space was truncated and half-empty. The specialized refugee support and general social policy provisions of the host state were distributed through domestic clientelism by rendering the large faith-based humanitarian actors as deserving of most of the centrally distributed resources. The autonomous civic actors, especially those pursuing equality-conscious advocacy, were doomed to rely on themselves, modest international support, and volunteering resources. Their mission and solidarity operations functioned not only as resilience to the ruling regime's norms but as substitutions for caring duties. These solidarians stretched their emotional, moral, and human capacities to respond to needs they considered unmet. As their dilemmas were manifold, some of them felt that they only had partial knowledge and professional skills to address and prioritize refugee needs. Others sensed the opposite by taking pride in enduring the increasing hardship and challenges. Some of our actors felt abandoned in their struggles, especially if they acted far from the urban centers of institutional, knowledge, and civic resources. As indicated above, it is not incidental that some solidarians chose to break the strategic compromise of meaningfully impacting the present to advance more daring and radical operations meant for the future.

The full-scale invasion of Ukraine and the ways in which the lives of the displaced became spatially dis/connected generated a *situational dimension of solidarity dilemmas* in the context we centered on.

The perpetuated hopes for return and the intensive nexus of several Ukrainians with their family members and relatives at home added a new layer to the solidarity rationales. Despite the physical distance, many of the displaced cultivate(d) active family relations, or often employment and livelihood links to their country of origine. They nurture(d) the hope that their home country would be their homeland again and their return would be possible in the foreseeable future. Solidarians thus had to acknowledge and act upon the displaced people's widespread desire to return to an existing homeland of close spatial proximity yet unknown temporality. Therefore, in the respective solidarity situation, the longer-term frames concerning a dignified human life became understood *outside of the solidarity spaces* through the autonomous relocation decisions of the displaced people. This did not erase temporary inclusion needs and principles yet multiplied the solidarity dilemmas vis-à-vis principles of rights, equality, and dignity. These dilemmas were articulated most intensively by those who helped organize educational services for the displaced children and their parents (which our research team will address in another publication, in progress).

The presented inquiry into civic solidarity experiences and dilemmas examined in a given context contributes to the production of knowledge on norm-setting mobilization and social-practice-based genealogies of civic solidarity. Our findings will help geographically and historically expand the research on civic solidarities in migration settings and beyond, in particular when solidarians show *defiance* to migration assistance and care provisions that normalize deserving-based social visions and governance practices. A limitation of our current study, as well as a direction for our future endeavors, is to genuinely relate our conceptual and empirical agendas to important research undertakings in Central and East European scholarship (Brković, 2024; Kovács & Nagy, 2022; Łukasiewicz et al., 2023; Macková et al., 2024; Molęda-Zdziech et al., 2021). We have offered insights into how solidarity actors articulated and worked with dilemmas associated with human needs, vulnerabilities, and host society inequality conditions. We did not consider our informants inherently progressive (Cantat, 2022). But we took it seriously that they did consider themselves reflexive actors who critically assess humanitarian, migration governance, and social policy mechanisms. We remain deeply interested in how the positions that we have portrayed above can mobilize the future leg of solidarity compromises and support social and political movements aimed at genuinely transformative modes of governing social affairs.

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Conflict of Interests

The authors declare no conflict of interest.

Data Availability

The data can be found in the data depository of the HUN-REN Centre for Social Sciences, Budapest.

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ARTICLE

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Solidarity in Ethnically Diverse Contexts: Supportive Relations of First-Generation Roma Graduates' Social Mobility in Hungary

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Abstract

The relationship between Roma and non-Roma in Central and Eastern European countries is determined by growing socio-economic inequalities, racism based on structural inequalities, and far-right policies of scapegoating. This trend is reinforced by the generally low level of social mobility. However, parallel to the main trend, a less visible process enables the social mobility of people of Roma origin born into marginalised, socio-economically low-status families. In this article, we aim to link issues of solidarity and diversity by exploring the support networks of educational and social mobility trajectories of Roma in Hungary. Based on 102 narrative life-story interviews with first-generation Roma graduates, we explore the helping and hindering relations, as well as the solidarity dynamics, that enabled their social mobility through education. The article answers the following questions: What types of supportive relations facilitate upward social mobility? What kind of mobility trajectories do these supportive (and hindering) relations engender? What happens to those who experience dislocation of social class and change of status? How do they navigate attachment to the community of origin and the attained middle class? By analysing narratives, we aim to highlight personal experiences of (educational) mobility and belonging by identifying different mobility trajectory ideal types and their accompanying supportive relations. Scholars of solidarity usually research the helpers. Here, we shift the perspective and research those lived experiences of solidarity that come from a racialised minority and receive help through their social mobility paths. Our research findings demonstrate that initial solidarity towards the vulnerable can have a spill-over effect: The helped can become helpers. In our case, first-generation Roma professionals who have first-hand experience with social and economic inequalities become drivers of social change, partly by building bridges across communities, partly by fulfilling jobs in the mainstream economy, and also by creating new narratives and advocating for social justice.

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Keywords
diversity; educational mobility; FIF graduates; Hungary; Roma; social mobility; solidarity

1. Introduction and Context

Research shows that increasing immigration and the emancipation of indigenous minorities have impacted national solidarity in democratic countries. This is particularly pertinent in authoritarian political contexts where governments use xenophobic and anti-minority rhetoric to consolidate power and mobilise certain segments of the majority society. Scholars of social equality and democracy seek not only to explain this but to uncover the conditions and potential circumstances whereby the reverse could happen: how solidarity contributes to social mobility and the status increase of disadvantaged minority groups. A reverse question also comes up: whether the social uplift of some of these marginalised and frequently racialised group members can be seen only as an individual project, an "individual success at the cost of collective failure" (Reay, 2018), where uplifted individuals exhibit a pattern of social closure by cutting ties to co-ethnics. Or would they rather develop a sense of ethno-racial solidarity? And, if so, how does this manifest in everyday practice (Vallejo & Ramirez, 2023)?

Although solidarity has been a dominant concept in the social sciences since its inception and has received much attention in recent years (Agustín & Jørgensen, 2019; Bayertz, 1998; Doreian & Fararo, 2012; Koos & Seibel, 2019; Lahusen, 2020; Leitinen & Pessi, 2014), it is difficult to conceptualise it. There is an analytical and normative interpretation of its meaning; this article, like other contemporary works (Kneuer et al., 2022), follows the descriptive and analytical approach manifested in social relations and actions as narrated by actors. Scholars of solidarity usually research acts of solidarity from the perspective of those offering it by analysing statements of solidarity (Kneuer et al., 2022, pp. 372–375) and, in most cases, focus on collective action (Della Porta, 2018).

Here, we shift the perspective on individuals who are affected by solidarity, particularly those who come from a racialised minority and who have received help through their social mobility paths. Additionally, we seek to bring the action, relationship, and "discursive-reconstruction" perspective (Kneuer et al., 2022) of solidarity into dialogue with the literature on racialised minorities' education-driven social mobility. For the purpose of this article, we find Kneuer et al.'s (2022) conceptualisation of solidarity from a discourse perspective helpful, according to which "solidarity entails actors motivated to contribute to overcoming an adversity and, therefore, to accomplishing a goal that is perceived as shared by both the giver and the taker of solidarity" (p. 376). In this definition, one crucial aspect of the communication about solidarity and the actual solidarity act is the existence of adversity and the perceived injustice that cannot be overcome individually. This adversity is a ubiquitous conditioning factor in the life and mobility trajectory of our interviewees.

By focusing on the life histories and supporting (or/and hindering) relationships of first-in-family (FIF) Roma graduates who have experienced a change of status compared to their parents through education, we aim to contribute to the literature of solidarity and diversity. Specifically, we explore the support networks underlying the upward social mobility trajectories of Roma individuals in Hungary facilitated by education. The life story and ethnographic approach used in this project allowed us to deeply explore lived experiences of received solidarity acts in the complex process of education-driven upward mobility through a

race-conscious, intersectional lens (Richards, 2020). Additionally, we could examine how different trajectories of education-driven mobility influence (if at all) the solidarity acts that the upwardly mobile incorporate into their everyday practices.

We aim to answer several questions. First, which supportive relationships condition the mobility of our Roma interviewees, and how does the role of these relations differ according to the characteristics of one's mobility trajectory? The results will be presented within the varying dimensions of the social relations and institutions that define relationships and bonds as narrated in the interviews. These dimensions are the following: the family; peer relationships and friends, including romantic partner choices; teachers and schools; relations with work and colleagues; and the impact of Roma educational support programmes and NGOs on mobility trajectory, identity formation, and status transition. We also ask what happens to those who experience dislocation of social class and how they adapt to their change of status. How do they simultaneously navigate attachment to the community of origin and the attained middle-class group? By analysing our interviewees' narratives, we aim to highlight personal experiences of different mobility trajectory ideal types and the solidarity patterns that accompany them.

Secondly, concerning the more general question in the literature that supportive ties and solidarity lead to social changes, we also look at the nexus of mobility trajectories and the sense and acts of solidarity they evoke (or not). Our question is: What (ideal) type of mobility trajectories do engender solidarity?

Through this latter approach, we aim to contribute to the broader debate on the implementation of solidarity relations and its consequences for social change, in the case of our Roma study participants.

2. Conversations With the Literature

2.1. Theories of Solidarity and Diversity

Solidarity at the micro level can be attained by supportive behaviours, occasional helping ties, responsibility, and collaboration. At the macro level, it explains social integration, which is the opposite of conflict, oppression, and self-interest (Leitinen & Pessi, 2014).

The growing polarisation of societies and the funding problems of the welfare state, as well as increasing immigration and multiculturalist policies have resulted in a deterioration of national solidarity, even in most democratic countries. A prevailing argument is that multiculturalism, being linked to neoliberalism, prioritised mobility and diversity over national solidarity. In an influential paper, Kymlicka (2015) argues for a reconsideration of the relationship between solidarity and diversity in terms of normative political theory, introducing the concept of multicultural national solidarity and the multicultural welfare state. Following this line of thinking, Bauböck and Scholten (2016) claim that the task of embracing cultural diversity and mobilising social solidarity does not necessarily have to be brought together in the same political entity (the multicultural nation-state envisioned by Kymlicka), but can be shared between local, national and supranational levels.

Although the two general concepts (diversity and solidarity) are not easy to align, there is a body of empirical research that points to the changing forms and levels of solidarity in response to increasing levels of cultural

diversity. Some of them apply the concept of social capital, social networks, and the associated norms of reciprocity and trustworthiness (Putnam, 2007). In a lecture entitled “E Pluribus Unum,” Putnam explored the implications of immigration and ethnic diversity for social capital and solidarity and argued for a dual effect, the first of which tends to disrupt, while the second to strengthen solidarity.

Upwardly mobile ethnic minorities play a key role in the shift between the two stages. In line with American sociology’s theory of assimilation, Putnam sees that the crucial moment in this change is that economically integrated immigrants and their descendants split ties with their communities of origin. Their bonding with the mainstream shapes integration and strengthens cohesion. Putnam is less concerned with the possibility that, along with social mobility, people of minority or migrant origin may remain, in whole or in part, tied to their group of origin. However, many empirical studies confirm that ethnic solidarity is not incompatible with certain forms and levels of assimilation (Portes et al., 2009) or upward mobility. Support from co-ethnic networks has been described as a form of social capital that facilitates economic action by promoting reciprocity, solidarity, and trust (Portes, 1998; Portes & Sensenbrenner, 1993). However, co-ethnic economic relations can also be a barrier to social integration, for example, through excessive expectations and requests for assistance; or through the need to conform to norms that limit personal freedom or the socio-economic progress of migrants (Portes, 1998).

Beyond ethnic solidarity, family relations also have a crucial role in explaining social mobility. There is considerable academic literature on how families are channels of intergenerational inequality. It is also shown that for individuals coming from socio-economically disadvantaged backgrounds, family can play a significant role in facilitating educational high achievement. A new line of research sheds light on the importance of intergenerational solidarity which varies across families and affects individual social mobility differently. The concept of intergenerational solidarity generally refers to the degree of closeness and support across generations and is commonly used by social scientists to identify and understand structural and socio-cultural variations in families. Empirical works identify one dimension of intergenerational solidarity; the so-called affectual solidarity is of particular importance in determining individual social mobility. Zhang and Deguilhem (2022) demonstrate that emotional closeness between parents and their children is positively related to both the possibility and extent of upward (occupational) mobility.

2.2. Racialised Minorities’ Education-Driven Social Mobility

Scholars studying racialised minorities’ or immigrant groups’ educational mobility through an intersectional perspective addressed how various social categories interact on multiple levels simultaneously (Shahrokni, 2015) to achieve academic success and get a degree “against the odds,” as the first in the family or the local community of origin. This literature, mostly using the social capital framework and the life story and ethnographic approach, often emphasises the role of bridging relationships—helping ties from the out-group, better-off mainstream society members—in achieving educational success (Stanton-Salazar & Dornbusch, 1995). However, in the context of mobility, where an individual’s social network undergoes significant change, the value of maintaining and strengthening bonding ties—with co-ethnic, in-group (mainly family and peer) members—remains crucial and should not be underestimated (Lukács & Dávid, 2019). As Lukács and Dávid (2019) emphasise, racialised and marginalised university students’ relationships with their families and community help their emotional stability in the process of academic adjustment.

Common public belief, drawing on old-school Romany scholarship about highly educated Roma asserts that Roma identity is highly vulnerable to upward mobility. Bárány (1998, 2002), speaking of the Roma in Slovakia describes how Roma people try to assimilate into the mainstream society by losing their identity when they enter higher education (HE) and get white-collar jobs. Torkos (2005) has also found that Roma graduates in Hungary typically assimilate. Contrary to the findings of these scholars, recent studies on Roma students in HE (Bereményi & Carrasco, 2018; Boros, 2019; Boros et al., 2021; Forray, 2014; Kende, 2000; Kóczé, 2010; Máté, 2021; Neményi & Vajda, 2014; Tóth, 2008; Trendl, 2023; Varga et al., 2020) evidence that these upwardly mobile young people retain their Roma identity.

These mixed findings align with scholarly works that highlight the varied outcomes of migrants' adaptation processes in a new society, which has many similarities to the experiences of upward mobility within social space. Berry (1992), for example, examining the modes of migrant adaptation, recognised the different options/categories of adjustment (such as assimilation, integration, segregation, and separation). He asserts that while some individuals adapt very well to their new social milieu, others can experience a great deal of difficulties that he calls "acculturative stress" (Berry, 1992, p. 75). This stress arises from the experience of stressors in the new social environment and will ease only when some satisfactory adaptation to the new social situation is achieved.

Previous research in different geographical settings, however, highlights the differentiated emergence of racialised ethnic minority FIF graduates' adaptation to the attained middle class' new social milieu due to their distinctive mobility-related dilemmas. In an influential paper, Neckerman et al. (1999) suggest that there is a distinct mobility path for racialised minority youth in the United States, one that emerges as a way of dealing with the costs of social ascension in ethno-racial stereotyping and discrimination contexts. To delineate this distinct mobility trajectory, Neckerman et al. (1999, p. 949) coin the term "minority culture of mobility" (MCM). By this, they mean "cultural elements...associated with a minority group...that provide strategies for managing...mobility in the context of discrimination and group disadvantage" (p. 949).

Since then, several studies have highlighted MCM's existence among racialised minority groups in different parts of the world (see, e.g., Durst & Bereményi, 2021; Mendoza et al., 2023; Naudet, 2018; Nivedita, 2023; Shahrokni, 2015; Vallejo, 2012; Vallejo & Ramirez, 2023). Part of MCM is that under-represented, immigrant, and racialised students in HE engage in multiple associative activities and clubs that valorise their culture (Shahrokni, 2015; Vallejo, 2012). In this regard, Roma HE students in Hungary behave similarly by creating or joining informal or NGO-led educational support programmes (Boros, 2019; Boros et al., 2021) or advanced (special) colleges (Lukács & Dávid, 2019; Lukács et al., 2023). These associations help under-represented, marginalised, and racialised students experience a sense of belonging. This is done by creating a cohesive community based on solidarity and pride, one where participants' socio-cultural and ethnic backgrounds are valorised (Shahrokni, 2015). Together with fellow students, mentees of these programmes are also equipped with resources to forge everyday anti-racist responses (Essed, 1991).

These above studies, however, tend to focus on secondary or tertiary education. With a few exceptions (such as a 2024 special issue in the journal *Compare*; see Durst & Bereményi, 2024), the complex interrelations between upward educational and social mobility are under-researched. The same is even more true for the interrelation between education-driven social mobility and solidarity.

This article aims to take a small step toward filling this research gap and contributing to this line of investigation by examining the lived experiences of upwardly mobile FIF Roma graduates in Hungary within the context of solidarity. It aims to contribute to the meagre literature on whether FIF Roma graduates can be taken as agents of social change by practising collective solidarity acts for the betterment of their oppressed community of origin and therefore for a more just society (hooks, 1986).

3. The Research Context in Hungary

To focus on the forms of solidarity and the relationship between Roma minorities and majority societies, we examine solidarity and interethnic relations in Central and Eastern Europe, particularly in Hungary. The operation and the level of solidarity in Hungary should be understood in the context of a low level of public trust, especially in state institutions (Kopasz & Boda, 2018), the relatively small number of volunteers, and a civil society weakened by an authoritarian political system in Hungary (Gerő & Kerényi, 2020; D. Sik et al., 2020; Takács, 2019). The forms of contentious solidarity (Della Porta & Steinhilper, 2022; Gerő et al., 2023) that emerge in the context of repressive state policies and most often in crisis situations have been thoroughly studied (D. Sik et al., 2020). During the refugee crisis in 2015, many people put aside their mistrust to help the needy (Feischmidt & Zakariás, 2019; Kende et al., 2017). The pandemic crisis in 2020 drew attention to the fact that social solidarity and mutual assistance between people had modestly increased. Based on a population survey from the summer of 2022, Zakariás et al. (2023) have shown the exceptional momentum and mobilising power of civil solidarity with displaced Ukrainian citizens both in terms of practical involvement and benevolent attitudes.

Willingness to help tends to be weaker where xenophobic, anti-immigration, and anti-minority discourses are strong (Koos & Seibel, 2019). These political forces and associated media representations frame immigration and minorities as a threat to the stability and integrity of native majority host societies. The current Hungarian government is a textbook case of how the “migrant threat” and the “Gypsy menace” is instrumentalised to enact a populist political order (Barna & Koltai, 2019; Gerő & Sik, 2020). A recent study in Hungary found that children in need and caregivers are seen as the most deserving of help, with two-thirds of respondents prioritising these groups. Around 60% support helping the homeless and unemployed, while only half believe in aiding impoverished Roma and addicts, with nearly half opposing support for these groups (Zakariás et al., 2023).

The relatively low level of solidarity with Roma can be explained by the relatively high level of anti-Roma prejudice and discrimination in Hungary (Csepeli et al., 1998; Vajda & Dupcsik, 2008). As per an EU-MIDIS survey (2009), 90% of Roma respondents have experienced discrimination in some areas of their lives. E. Sik and Simonovits (2010) point out that Roma origin significantly increases the degree of perception of discrimination in the labour market, education, and access to different services.

Several studies highlight that the Gypsy-image of the majority population in Hungary tends to be quite homogeneous, stereotypical, and full of negative prejudices (Csepeli et al., 1998; Csepeli & Simon, 2004; Kende et al., 2021). The perception of Roma by out-groups is shaped by hostile and negative cognitive and emotional biases (Csepeli & Simon, 2004). However, there is a lack of empirical research on the self-definition and self-perception of the Roma (Csepeli & Simon, 2004; Kende, 2000). These few researchers have characterised the ethnic identity of the Roma in various ways. Some scholars introduce the

concept of double minority consciousness, which manifests distinctly within the minority and towards the majority society, making the minority consciousness both defensive and fragile. Others interpret Roma identity as a form of symbolic revenge on the majority society (*Gadjos*), asserting equality or superiority while reinforcing their identity in relation to the dominant culture (Kende, 2000).

Institutions, especially schools with inclusive education, have a major role in what kind of supportive ties one can benefit from on his mobility path. The Hungarian education system is, however, highly selective in the European context (Radó, 2018). The selection mechanisms are multifaceted, involving both formal institutional policies and informal practices (Papp & Neumann, 2021; Radó, 2018). This selectivity forms the broader context of Roma educational segregation (Radó, 2018). Roma students often face discrimination and racialised differentiation within schools, impacting their academic performance and overall educational experience (Kisfalusi et al., 2021).

Countering these widespread and historically embedded discrimination processes against the Roma in Europe, the integration of Roma, the reduction of their disadvantages in education, access to the labour market, adequate housing, and other areas of their social well-being is an important objective of the EU. The past few decades, partly in the framework of the Decade of Roma Inclusion, have witnessed significant commitments and attempts to develop and implement programmes that aim to increase the educational attainment of Roma. These endeavours have involved, among others, the EU and the Council of Europe, along with investments by various private foundations, non-governmental organisations, and national governments. After the 1989 regime change in Hungary, governments and civil organisations also launched various scholarship programmes to support talented Roma students at primary, secondary, and university levels (Arnold et al., 2011; Boros, 2019; Lukács et al., 2023; Van Driel, 1999).

In HE, colleges for advanced studies are the most important institutions for promoting talent and supporting Roma students. Founded in 1996 by the Roma Civil Rights Foundation, Romaversitas (or as its mentees call it, Romver) was the first advanced-studies college for Roma students (Forray & Boros, 2009). The Christian Roma Colleges for Advanced Studies Network was founded through a collaborative effort between the church and government in 2011 (Biczó, 2021). These institutions are academically selective, and most of them accept applications from students who are self-declared Roma. In addition to fostering their students' intellectual abilities, they engender a sense of belonging and provide an emotional shelter against racialisation and discrimination (Nyírő & Durst, 2018), equipping participants with both material and psychological support (Varga et al., 2020). They also offer special courses, scholarships, and dormitory accommodation (Biczó, 2021; Bozsó et al., 2018; Dunajeva & Tidrick, 2015; Lukács et al., 2023). These institutions support the formation of a strong and positive Roma identity and aim to build a Roma middle class (Bozsó et al., 2018).

However, despite their academic success, Roma university graduates in the Hungarian labour market still face considerable challenges, primarily due to discrimination. Despite having the necessary qualifications, many encounter significant barriers in securing employment, as employers often harbour prejudices against them (Árendás & Messing, 2022; Babusik, 2008; Bodrogi & Iványi, 2004; Durst et al., 2022; EU-MIDIS, 2009; E. Sik & Simonovits, 2010). Roma graduates frequently find themselves underemployed or in jobs that do not match their skill levels. As most of them are FIF graduates, the lack of a professional network with middle-class mainstream groups also contributes to their labour market difficulties.

According to our research findings, almost half (49%) of the Roma respondents employed at the time of the interview were engaged full-time in roles related to Roma issues. Over a quarter (29%) had part-time or voluntary positions in this area. This trend is linked to the social relations and characteristics of the social networks of Roma graduates. Another mechanism behind their labour market segmentation is that Roma are often placed in token positions by those helping them to find a job.

4. Methods and Data

Based on narrative, life story interviews with Roma FIF graduates, this study explores the supportive relationships and solidarity networks that enabled social uplift through education. It also examines the types of solidarity that education-driven social mobility (can) evoke.

Using data from the Social Mobility and Ethnicity: Trajectories, Outcomes and the Hidden Costs of High Educational Achievement project, we analyse mobility trajectories and outcomes. The sample of our interviews conducted in 2018–2021 comprises 102 Roma FIF graduates, mainly between the ages of 24 and 53. The gender distribution of the sample is 58% female and 42% male. They all come from families in which the parents did not have a university degree and many of whom came from socioeconomically disadvantaged family backgrounds. The majority of respondents identify as Romungros, or “Hungarian Gypsies,” while the other two major Roma groups in Hungary—the Beas and Vlah Roma—are also represented in the sample. The majority of the interviewees come from villages, accounting for 53% of the total. A significant portion, 25%, originate from county seats, while 16% are from other cities. Only 7% of the interviewees come from Budapest. All of our respondents have successfully obtained a university degree. Most of the interviewees have a degree in humanities and arts (25%), followed by education (24%) and social sciences, journalism, and other information services (23%). Another group studied health and social care (13%), while a smaller portion had degrees in business, administration, and law (12%). Only a few interviewees have backgrounds in engineering, manufacturing, and construction (4%) and in natural sciences, mathematics, and statistics (1%).

Participants for our research were recruited through personal networks, snowball sampling, and public advertisements on social media. The interviews were conducted by our research team of 14 members (five men and nine women), whose ages ranged from 25 to 52. Four of the team members were Roma. The diversity of the interviewers contributed to the avoidance of one-way bias when collecting the interview data. The Roma background of the interviewees was established based on their self-identification.

We carried out narrative life-course interviews, each ranging from one to three hours in duration. Informed consent was obtained from all participants, and data control and management were handled in compliance with the General Data Protection Regulation. The transcriptions of the recorded interviews were anonymised to ensure the privacy of the interviewees, in accordance with research ethical guidelines. Each participant was assigned a pseudonym.

The anonymised interview transcripts were coded in multiple steps: Initially, we employed an inductive approach to identify emerging themes, followed by a deductive approach, where coding was guided by our theoretical inquiries and interview guidelines. Our theoretical coding is based on Berry’s (1992) model of acculturation and Ingram and Abrahams’s (2015) typology of habitus change during educational mobility. A codebook was developed by our research team that provides explicit definitions for each category.

Our approach to maintaining “epistemic justice” reflects a commitment to amplifying Roma voices in the research process. Although the authors are second-generation majority-population graduates, the diverse perspectives within our team helped mitigate potential biases in data collection and interpretation.

5. Results: Mobility Trajectories and Their Solidarity Relationships

We shall understand upward mobility in terms of our FIF Roma graduate study participants exceeding the education level of their parents, peers, and community of origin and acquiring a higher social status and better material conditions (Crul et al., 2017; Mendoza et al., 2023; Pantea, 2022). In what follows, we address our research questions on how acts of solidarity contribute to social mobility and whether uplifted Roma graduates exhibit a sense of ethno-racial solidarity. To do so, we grouped our interviewees based on their diverse mobility paths, which we identified by thematically analysing their narratives. By examining these narratives, we focus on the connection between two key aspects: first, the relationship between their specific mobility trajectories and the various dimensions of solidarity acts—both in-group (from their co-ethnic Roma communities) and out-group (from non-Roma)—that supported their mobility; and second, the solidarity acts or discursive practices that emerged as a result of their social uplift.

Combining Berry’s (1992) different options of acculturation orientations developed to characterise the impact of contact within multicultural societies on minorities, with Ingram and Abrahams’s (2015) typology of habitus change caused by social mobility, we identified five ideal-typical upward mobility trajectories among our study respondents. The categories are based on the narratives of our interviewees regarding their social mobility progressions and outcomes. The boundaries are blurry and dynamic, shifting from one category to another, with each mobility trajectory emerging through the stories of our respondents, through particular solidarity relations. In each category, we focus our attention on the dominant supporting (or hindering) ties mentioned by our interviewees as important during their mobility path.

Regarding the commonality of appearance of these five ideal-typical categories in our sample, we shall assert that while the first two types are quite rare, the last three types are much more common. These latter three categories show many similarities to what is called the MCM in the relevant literature. As we argued in earlier work (Durst & Bereményi, 2021), among the academically high-achieving participants of our study the most common upward mobility trajectory, contrary to the common belief of assimilation, is their distinctive minority mobility path. This distinctive incorporation into the mainstream is regarded as the MCM (Neckerman et al., 1999). However, we prefer to apply the concept of “minority mobility trajectory” instead, to avoid the overloaded ambivalent connotation of “culture” in the case of Roma.

5.1. Disembedded From the Poor Minority Milieu of Origin Without a New Attachment to the Mainstream Middle Class

Several upwardly mobile Roma interviewees felt at some point on their mobility trajectory that they were rejected by mainstream society while simultaneously becoming detached from their community of origin. This feeling of disembeddedness, however, proved to be only a transitional phase in most of our respondents’ mobility journey. At the time of the data collection of our research project, only a handful of them belonged to this “disembedded” category.

Frequent experiences of discrimination and stigmatisation prevented many of the interviewees in this group from feeling that they fit into their new world. The range and speed of their upward mobility were so "brutal," as one of them put it, and the social distance between their community of origin and their attained (non-Roma Hungarian) middle class was so vast that they still have not managed to reconcile belonging to two different worlds. This resulted in a sense of loneliness. For some, the pain comes from the fact that despite their desire to help advance the Roma as a group, they feel neglected and unrecognised by their own ethnic community:

> When I go back to my village, I see everybody is busy, in the construction industry, their own businesses and earning good money with their 8 years of schooling. They don't understand me, we are not at the same intellectual level. Nobody is interested back home in my opinion....When I was a child, I wanted to be the Martin Luther King of the Roma. Most of us Roma intellectuals who have risen from poverty think that we will do something for our community and give something back. But even if I feel I made a brutal jump [on the social ladder], I do not see they like me more, they praise me. I'm lonely. My Roma community at home see me as a stranger. But I do not feel at home in my new community, among my majority, non-Roma colleagues either. (Sanyi, 45, a theology graduate)

On top of that, many in this group complained about their alienation from their ethnic community of origin. They also mentioned "not supporting, but at least not hindering" parents with whom their affectual family solidarity was absent. It was mainly because parents did not understand why their children chose to study further instead of going to work and contributing to the family finances. Therefore, interviewees belonging to this category reported painful mobility journeys involving alienation from their community of origin and families.

On the other hand, many of them recalled the importance of supportive ties with non-Roma "significant others" (Stanton-Salazar, 1997), be it a local priest, a supportive teacher, or an encouraging sport coach, at the early stage of their mobility trajectory. From the narratives, it becomes evident that non-Roma teachers occupy a complex and ambivalent role in shaping the educational trajectories of Roma FIF graduates. Several participants highlight teachers as pivotal facilitators of mobility, acting as protective agents (Bereményi & Carrasco, 2017; Stanton-Salazar, 1997). Teachers facilitate educational mobility by widening Roma students' "horizon of possibilities" (Bourdieu & Wacquant, 1992) and developing their "capacity to aspire" (Appadurai, 2004), providing crucial support (helping with the application to secondary school and university) and encouragement (entering them in competitions), helping Roma students overcome systemic barriers to achieve academic success. Teachers often serve as mentors, advocates, and role models, fostering a positive learning environment and inspiring students to pursue HE and professional careers. This support is often ad hoc and not institutionalised, manifested in occasional supportive ties, reflecting individual efforts rather than systemic initiatives. However, in other mobility trajectory categories, our interviewees frequently mentioned traumatising, discriminative teachers' practices.

Finally, respondents in this group also recount helping ties with colleagues from the white mainstream at a later stage in their mobility journey. But they do not feel a sense of belonging as they are always relegated to dealing with Roma-related topics in their profession—whether they want this or not.

5.2. Disembedded From the Poor Minority Community But Attached to the Mainstream Middle-Class

Constructing a different mobility path, some of our upwardly mobile Roma interviewees narrate a successful incorporation into the mainstream economy (jobs that are not ethnicised, not targeted towards the Roma community) and this professional and social milieu is a determining factor in their identity. They say: "I belong to the Hungarians," or "I am accidentally a Roma, just because my parents are Roma," "I do not belong to the Gypsies." Some of them have left Hungary due to their personal experiences of everyday racism and "racial stuckness." Abroad, they have a diverse scope of employment, from working in the corporate sector to being project manager at an international charity to serving as a youth worker helping refugees in a Western developed economy.

Their supportive relations are characterised by a family that has already achieved a degree of upward mobility and is somewhat assimilated, and their child (our interviewee) has simply continued the family path. These supportive and affective family ties made their mobility trajectory emotionally smoother (Nyírő, 2022). As Róbert explains, the great ascension on the social ladder was achieved by his parents and grandparents and not by him:

> All I attained is down to my parents, and my parents' parents. I come from a family, an environment where the importance of education was understood early on. I only had to study, that's all. I didn't take such big steps. My parents, they took giant steps from great poverty. (Róbert, 43, engineer)

Apart from supportive family ties with the aspiration capital of the family, interviewees in this category frequently cited interethnic peer relationships as a factor enhancing their perspective on the "horizon of possibilities" (Bourdieu & Wacquant, 1992) and facilitating choices of secondary school. This relates to the fact that these ties with the majority society often simultaneously provided bridging ties (Putnam, 2000): connections to families of higher social status. Several research participants followed the educational paths of non-Roma friends from higher social classes, applying to the same schools as their classmates. Therefore, non-segregated schools also promote mobility due to the relationships formed between students. However, while non-segregated schools and interethnic friendships significantly enhance the upward mobility of Roma children by exposing them to new opportunities and increasing their aspirations, these benefits are tempered by challenges such as isolation and the pressure of being an underrepresented minority in the educational setting.

Interviewees in this category also narrated about romantic partnerships or marriages with non-Roma, middle-class majority partners that seemed to have helped their upward mobility.

Last but not least, they did not mention having any joint ethnic-oriented educational programmes. Either because they belong to an older generation and there was no programme of this kind during their university years, or they just did not know about the existence of these support initiatives as they retained no ties to their co-ethnic community.

5.3. Conflictual Double Attachment

This category describes several respondents who try to incorporate the structuring forces of both milieus—the poor minority origin and the attained majority middle class—into their trajectories and attachments but cannot

successfully reconcile them. Instead, they oscillate between the two fields and internalise conflict and division. They say: “I am located somewhere in-between,” or “It is like living a schizophrenic life,” “I’m not Hungarian enough for Hungarians, I’m not Gypsy enough for Gypsies,” “I lived between the two worlds.”

The tension is perceived to be deeper in the case of conflicting community ideologies or of long-range mobility paths in either educational or geographical senses, and if the mobility trajectory is not gradual, but structured around a few sudden, big steps (e.g., attending a high-prestige, elite secondary school or university; Nyírő, 2022).

Many of the respondents in this category speak about the psychological strain and pain of divided loyalties between their community of origin and their destination mainstream middle-class, with their conflicting ideologies. Janka recalls a legal case that triggered her leaving her law firm:

> You see this broken poor Gypsy man who lost his son. And you sit on the other side, as your white middle-class firm is obviously representing the hospital, not the victim. And I started to feel sick, and I knew I couldn’t do this. I will never become the one who sits on the other side. (Janka, 38, lawyer)

Among the supportive ties, there is an emphasis in this group’s narratives on the strong affectual parental solidarity that made their further study possible, though in many cases, these studies bring the accusation by the extended family of “betrayal” of “Gypsyness” by uneducated members of the community.

Intra-ethnic peer relations appear in the narratives of many of our interviewees in this category as hindering their mobility initially. Portes (1998) found in the case of second-generation immigrant students in the US that social capital can result in a “down-levelling” of norms, where pressure for group conformity can hinder the achievement of individuals striving to exceed the group’s standards, particularly in educational settings. We also found that academically high-achieving Roma students reported being accused by Roma communities of origin of “becoming Hungarian” (*elmagyarosodik*), referred to as *gizda* or “pretentious” for trying to get ahead. This placed an emotional burden on our interviewees seeking upward mobility that impacted their mobility journeys.

This example of mobility-hindering relations is compensated by strong supportive relations with non-Roma, majority peers and some protective school teachers able to counteract the vast majority of anti-Gypsy discriminatory attitudes towards Roma students.

Beyond all these supporting ties, interviewees in this category often mention occasional helping relations with colleagues. However, many of them feel resentful about the usual experience that Roma are often placed in token positions by those helping them to find a job:

> Often, I felt that at different workplaces, they needed a Roma face, a Roma colleague to be able to say that they ‘work with Roma.’ But they never allowed me decision-making, management, or leadership roles. Despite having two degrees and speaking advanced-level English, I was always assigned coordination tasks. (Eszter, 39, working in a ministry in the field of social services)

Finally, individuals in this category often mentioned the felt expectations from the majority society that graduate Roma "should give back" to their community (Gulyás, 2021), which contributes to their labour market segmentation or the feeling of guilt for not meeting this expectation.

5.4. Reconciled Double Attachment (Bridging Minority Middle-Class)

The narrative of the reconciled double attachment connects the representation of the poor minority background and the targeted mainstream middle-class milieu, despite their perceived contradictions. The ideal typical person of this group has a strong and positive Roma identity and at the same time, s/he refers to being Hungarian as well. The narratives of people in this category demonstrate that many of them play a "bridging role" between their background minority community and their attained, majority dominated middle-class (see also Durst & Bereményi, 2021; Nyírő, 2022). Reconciling the two fields is easier in the case of short-range mobility paths in both educational and geographical senses, and if the mobility path is gradual (Nyírő, 2022).

However, in many cases, our respondents achieved this reconciliation later on their mobility trajectories, after a difficult time of "finding themselves." For many, this identity reconstruction process began at university with pro-Roma educational support programmes and initiatives.

During their university years, many are active in minority organisations (Kállai, 2014; Nyírő & Durst, 2018) and involved in "giving back" to their Roma communities. In this way, a large number of them are working in parts of the labour market where they can help people in need (Gulyás, 2021). Anna, who established an ethnic social enterprise, refers to herself as having "a bridging role." As an upwardly mobile Roma woman, she has the ability and resources to connect her two worlds:

> My colleagues, some of whom are elite film directors, told me that they needed a Roma "face" in their films. So I told them I'd cast them. They said, who else if not me because I am Roma and have acquaintances in this circle, I can go to a Roma colony and better explain to them than a non-Roma what kind of job is on offer. If I say it, they accept it better. There is a brotherhood between Roma people. I understand both worlds and I also still feel at home among the Roma. I believe that success [in work] depends on personal ties these days. The more [resourceless Roma] people I can connect to those who have resources, the better. (Anna, 28, film director)

5.5. Oppositional Minority Middle Class

The main characteristic of those on this mobility trajectory is a minority middle-class narrative as a "protest identity" presented usually in "opposition" to the dominant majority. Individuals on this pathway practice almost only ethnically "bonded solidarity" (Portes & Sensenbrenner, 1993). This identity strategy is illustrated by Anita, whose upward mobility journey was crowned with impressive academic success:

> If you ask me about my identity, I'd say it is composed of different elements, creating a mosaic. I am Roma, a woman and mother. What is important to me is that I work for an NGO and that I am always in this oppositional role. It has taken a long time for me to overcome shame, of myself, of us, being Roma. Now it's settled in me [*helyre került*]. I use it in protest by pushing this issue. Since I am in this privileged

> position, I try to get my majority non-Roma colleagues to face how problematic it is that I am the only Roma at work, the only Roma doing a PhD at a top university. Isn't it shitty? (Anita, 35, PhD student)

This minority middle-class narrative prioritises like-minded Roma friendship networks and supportive ties mostly from their co-ethnic peers or the older generation activists or other public intellectuals. These relationships came later in their educational careers, after secondary school. The close friends were mainly Roma HE students whom the narrator met through the Roma educational support programmes on the same upward mobility path and who, therefore, understood their world. Many of them, however, live in mixed marriages with partners from other minority groups, like the Jews in Hungary.

Individuals in this category do not mention any particular teacher or mentor during their school carrier. Instead, the emphasis is on their merit and the significant role of Roma-oriented educational support programmes in facilitating social mobility and mitigating the "price" of class dislocation.

Regarding the token supportive ties in the workplace, there are frequent recollections of experiences of everyday racism and sexism at work which they believe hinder their upward mobility as they hit a "racial glass ceiling" (Durst et al., 2022). This factor, their inner drive, and their feeling of obligation to give back to their communities of origin channelled their mobility trajectories towards dealing with (Roma) community-related issues in the labour market. As we have demonstrated (Nyírő, 2022), this leads to their focus on the "helping" segment of the labour market: a financially precarious position. This group demonstrates professional solidarity, though bonded, aimed at Roma communities only; they developed a "protest identity," an oppositional self, which defined itself to, and in opposition with, the non-Roma majority in Hungary.

6. Discussion and Conclusions

In our study, we discussed a specific case of solidarity relations in multi-ethnic societies, and the support provided to members of upwardly mobile Roma first-generation professionals, in the hope of contributing to the broader debate on the implementation of solidarity relations and its consequences for social change. We demonstrated that even in the context of a relatively high level of anti-Roma prejudice, there are supportive relations that make the rare instances of upward social mobility possible for Roma coming from disadvantaged family backgrounds. Some of these helping relations are institutional, but many are informal, occasional ties, the result of a few "significant others or protective agents" (e.g., schoolteachers, mentors). The importance of inclusive education in promoting mobility is even more salient: None of our 102 interviewees went to a segregated school. Integrated schools not only provided better quality education, but they also contributed to enhancing our respondents' "horizon of possibilities," partly through interethnic peer relations and bonding ties with students of higher-status families. Thus, early interethnic supportive ties put them on the mobility track, against the odds and structural constraints.

Our research findings confirm the significant role of intergenerational solidarity, too. Most of our Roma FIF graduate respondents emphasised the importance of their parents in the success of their upward mobility trajectories. Many of them came from families with high aspirational capital where mobility was a multi-generational project. Apart from this aspirational capital, the strong bonding ties with parents had a crucial role in sustaining emotional stability in the context of elevated discrimination and feelings of dislocation concomitant with changing social class.

The fact that at least one parent in socio-economically disadvantaged families viewed their offspring as having the potential to fulfil their own unfulfilled dreams of pursuing further education was strikingly common in our sample (see also Bereményi & Carrasco, 2018). The vast majority of our interviewees spoke about the emotional closeness and support with at least one of their parents and how it caused them to persevere through difficulties to achieve upward social mobility. Thus, we argue that affectual solidarity between parents and offspring had a decisive role in facilitating the upward mobility of our participants. The role of older siblings, and 'sisterly' solidarity in helping climb the social ladder was also obvious in our sample.

In a few cases, where affectual family solidarity was absent partly because parents did not understand why their children chose to study further instead of working and contributing to the family finances, our interviewees reported painful mobility journeys, with loneliness and alienation from families. But in most cases, parents saw education as an important vehicle for social uplift: "At least they did not hinder me from further studies," as one respondent put it. We see this type of mobility as a multigenerational family project in which affectual intergenerational solidarity is pertinent.

Another crucial factor we identified is that those who come from mixed marriages—one parent Roma, the other non-Roma Hungarian—where usually one parent is from a family of higher social status than the other, speak about an additional cultural capital family transmission. This "dominant, white middle-class cultural capital" (Wallace, 2016) that they are endowed with by their family, facilitates educational mobility.

Other forms of intra-ethnic solidarity came from older generations of Roma professionals and from like-minded Roma FIF graduate peers whom they met in different Roma educational access programmes. Apart from the significance of family support, and/or affectual family solidarity, the ubiquitous mention of the role of the Roma NGOs/educational support programmes is salient in the narratives.

The mobility narratives of our respondents clearly exhibit that those who participated in any Roma-oriented educational support programme have gained awareness (and a language) about understanding the structural, historically embedded oppression of their people. This awareness, combined with a shared perception of injustice against their community of origin, created the conditions—consistent with Kneuer et al.'s (2022) claim—that evoked many of their solidarity feelings and acts. These acts were expressed as a symbolic fight for a collective goal in response to the perceived injustice (creating equity and equal opportunity for discriminated Roma). By reversing the stigma tied to class and ethno-racial background, the relevant associations can elaborate anti-racist discourses, thereby promoting minority empowerment (Boros, 2019; Boros et al., 2021; Shahrokni, 2015). On the contrary, those who travelled "individually," on an assimilationist trajectory, and not in a "collective way" (as part of a Roma-focused educational programme, special college, or NGO), do not exhibit solidarity acts toward their community of origin. For them, being born Roma is an "accidental" fact, meaning only that their parents, or one of them, are Roma.

Therefore, we argue, that the characteristics of one's education-driven social mobility trajectory have consequences for whether upward mobility evokes solidarity or not. Here, we use the term solidarity, pursuant to bell hooks, as a "sustained, ongoing commitment for shared interests, and beliefs" (hooks, 1986, p. 138). This solidarity of our FIF Roma graduates is targeted to the in-group, their co-ethnics (and on rare occasions, to other socially vulnerable groups such as the poor).

It is different from the occasional support (or supporting ties) of those out-group, “significant others” (Stanton-Salazar, 1997) whose short-term solidarity acts also cannot be undervalued if one wants to understand the conditioning factors of our Roma interviewees’ upward mobility. However, these solidarity acts manifest in ephemeral, intermittent helping ties that are based on the better-off out-group individuals’ perception of significant adversity that cannot be overcome individually by the taker of these helping relations (for example, the supporting ties with teachers and work colleagues).

Based on our findings, we argue that the social mobility of Roma in Hungary through education and schooling can be seen as part of a social change that has a lasting impact not only on the Roma people concerned and their ethnic environment but also on inter-ethnic relations and the cohesion of multi-ethnic society. We have explored this effect through narratives of upward mobility and found that sometimes retaining bonding ties with one’s ethnic community of origin does indeed go hand in hand with acceptance by the targeted middle-class mainstream. This is the effect, or process, that the literature on the relationship between solidarity and diversity referred to in our introduction section.

The social changes brought about by supportive relationships were uncovered by interrogating the mobility trajectories of individuals of minority origin and middle-class aspirations. Our research results are in line with previous empirical findings that the more injustice one perceives, the more s/he is likely to engage in collective action against racial discrimination and for a more just society. We found that those Roma graduates who travel on the distinctive minority mobility trajectory (type 5.4–5.5) exhibit strong ethnic solidarity. Part of this is the practice of “giving back”—a common characteristic of other racialised minorities’ upwardly mobile middle-class, too.

Among these categories, those who constructed an oppositional minority middle-class identity on the distinctive minority mobility trajectory (type 5.5) speak about this practice as one directed towards the enhancement of social mobility of their co-ethnics and a more just society where Roma will have better life chances. They narrate a protest identity that has a solidarity-evoking and community-building capacity among Roma intellectuals, professionals, and/or activists. Nevertheless, they also recount how the mainstream society directs them to ethnicised, (Roma) community-related jobs, which brings a precarious status to the labour market and also, an emotional burden. Their solidarity is an intra-ethnic one and their upward mobility results in a (moral and social) status advancement within their ethnic group. From being helped, they become helpers, by creating and forming support networks, advocating for equity, facilitating the mobility of their background community through providing resources, taking on mentorship, and sharing knowledge to make newcomers experience less strain emotionally and help them navigate an unfamiliar professional path.

On the other hand, those FIF Roma graduates with a minority mobility trajectory who identify as having a double attachment, both to their (Roma) community of origin and also to their (mainstream) destination middle class (type 5.4), perceive themselves as fulfilling a bridging role. They facilitate interethnic solidarity, by connecting their resourceless Roma community members to their resourceful majority (non-Roma) colleagues. Some of them contribute to their background community’s incorporation into the labour market, while others have chosen helping jobs such as becoming social workers, psychologists, teachers of special needs pupils, or nurses.

Finally, our research finding demonstrates that both inter—and intra-ethnic solidarity ties in diverse, multi-ethnic societies have a double effect. On the one hand, they can facilitate—in our case, education-driven—upward mobility for those coming from socio-economically disadvantaged families, even in the context of anti-minority rhetoric (and anti-Gypsyism). On the other hand, initial solidarity towards the vulnerable can have a spill-over effect: the takers can become givers. In our case, first-generation Roma professionals who have first-hand experience with social and economic inequalities became drivers of social change, partly through building bridges across communities, partly by fulfilling helping jobs in the mainstream economy, and also by creating new narratives and advocating for social justice.

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Conflict of Interests

The authors declare no conflict of interest.

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ARTICLE

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Dual Marginalisation and the Demand for Dual Citizenship: Negotiating "At Homeness" Among Diaspora Liberians

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Abstract

In Liberia, identity and citizenship have long been contentious, with dual citizenship emerging as a focal point in recent decades. On 22 July 2022, former President George Weah signed an Amendment Law allowing Liberians naturalized abroad to retain citizenship and granting Liberian women the right to confer citizenship to their children, addressing a key demand from diaspora Liberians. This article, based on my doctoral thesis (Vaughan, 2022), examines diaspora Liberians' advocacy for dual citizenship within contemporary debates on citizenship as a strategic institution. Drawing on the "post-exclusive turn" in citizenship (Harpaz & Mateos, 2019), which suggests that individuals often prioritize a premium passport over strong ties to a homeland, the article explores how diaspora Liberians pursue dual citizenship to secure a "true home" in Liberia. This advocacy is fueled by their marginalization both in Liberia, where they face scrutiny over their Liberianness, and in their host countries, where they experience otherness as ethnic minorities. Dual citizenship, for these Liberians, is a strategic path back to belonging in Liberia. This article highlights the intricate interplay between identity and citizenship in Liberia, complicating the strategic citizenship framework by shedding light on the nuanced experiences of diaspora Liberians as they navigate dual marginalization and negotiate belonging. By focusing on these dynamics, the article contributes to the broader debate on citizenship in Africa, an area that remains understudied. Moreover, it reframes discussions on strategic citizenship, particularly in the context of growing inequalities and rising anti-immigrant sentiments.

Keywords

belonging; diaspora Liberians; dual citizenship; home; Liberia; marginalization; strategic citizenship

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1. Introduction

Since the 1990s, there has been a significant global trend toward accepting and allowing dual citizenship, a shift driven by varying factors, including increased international migration, globalization, and changing attitudes toward national identity and belonging. African states have aligned with this trend, departing from the restrictive policies of the 1960s, when most newly independent African nations strictly prohibited dual citizenship (Manby, 2016). Despite a substantial number of African states permitting dual nationality and allowing individuals to hold dual citizenship under various conditions (Manby, 2016, 2024), African countries and their citizens have remained largely understudied in the literature on dual citizenship (Whitaker, 2011). This article focuses on Liberia, which, until July 2022, enforced the automatic loss of citizenship for any Liberian acquiring foreign citizenship upon adulthood. As a post-conflict society with a history rooted in an Indigenous majority, the emigration of Black American and Afro-Caribbean settlers, and a contemporary context of immigrant communities like the longstanding Lebanese population and a significant diaspora population, Liberia presents a key case for examining the complexities of dual citizenship claims. Sierra Leone also offers a compelling case study (Hale & M'Cormack-Hale, 2018). In Liberia, however, discussions on the country's citizenship regime often center on the contentions over dual citizenship, emphasizing the policy implications for post-war reconstruction and development (Pailey, 2021; Vaughan, 2022).

In this article, I explore the motivations of diaspora Liberians in demanding dual citizenship in their homeland, focusing on their emphasis on the need for a "true home" and a place to belong. Using the framework of "strategic citizenship" (Harpaz & Mateos, 2019), I argue that diaspora Liberians locate this need for a true home within a perception of dual marginalization that they experience in both their host and home countries. I use the term "marginalization" to describe the perceived exclusion and ostracization diaspora Liberians face in both their host and home countries. This encompasses systemic barriers abroad, such as discrimination based on race, immigrant status, and cultural differences, as well as contested belonging in Liberia, where factors like not speaking local languages, lacking a local accent, or not being born in the country contribute to their sense of alienation. The context of this marginalization reflects not only their exclusion from full political and socioeconomic participation but also the complex dynamics of identity, citizenship, and belonging shaped by their transnational existence. Consequently, diaspora Liberians consider access to dual citizenship in Liberia as a *practical strategy* that provides them (and their children) a route back to their true home in Liberia.

Diaspora Liberians' pursuit of dual citizenship in Liberia complicates the strategic citizenship framework, which emphasizes the influence of global inequality on the meaning and value of citizenship over traditional notions of national identity and territorial attachment. Harpaz and Mateos (2019) argue that individuals seek dual citizenship primarily for practical benefits, such as improved mobility, opportunities, and status, rather than ties to a specific homeland. They suggest that citizenship attitudes are shaped more by a country's passport rank in the global hierarchy than by national identity. While the framework is an insightful emerging field, it overlooks the complex experiences of diasporas and their sense of belonging. Additionally, the framework's focus on naturalization in industrialized Western countries fails to address how rising anti-immigrant sentiments may influence dual citizenship claims in contexts outside this dominant narrative, particularly where citizenship is not simply a tool for elites to access premium passports. By examining dual citizenship claims in Liberia, this article contributes to the literature on strategic/dual citizenship by analyzing an understudied African context, highlighting the interplay of identity, belonging, and citizenship claims in a post-conflict society. Drawing on the motivations of diaspora Liberians, the article indicates the

need to take the exclusively host country-focused blinkers off of the theorization of strategic citizenship and consider the possibility in non-traditional cases to draw attention to a much more complex picture of citizenship and belonging.

The remainder of this article is structured as follows: I outline the methods employed in the study, followed by a brief overview of dual citizenship studies to underscore the relevance of the strategic citizenship framework. In section four, I highlight key issues foundational to Liberia's longstanding debates over citizenship and belonging. I also explore the July 2022 Amendment Law and the two major dual citizenship proposals that preceded it, illustrating the trajectory toward the allowance of dual citizenship in Liberia. Section five critically examines the complexities of diaspora Liberians' perceived marginalization in both their home and host countries, which underpins their sustained advocacy for dual citizenship, while the concluding section reaffirms the article's key argument highlighting how dual citizenship reflects broader issues of identity, belonging, and exclusion within the Liberian diaspora, and situates these findings within the wider context of strategic citizenship debates and belonging.

2. Methods

This article is based on a multi-year research project that employed a qualitative approach to explore the implications of Liberia's settler-colonial origins on efforts to construct a collective Liberian identity in the post-war era (Vaughan, 2022). I conducted in-depth semi-structured online interviews with 31 key stakeholders over seven months between 2019 and 2020. Following Mayan's (2009) sampling guidelines, participants included representatives of Liberian diaspora organizations such as the All-Liberian Conference on Dual Citizenship (ALCOD), Union of Liberian Associations in the Americas (ULAA), the European Federation of Liberian Associations (EFLA), and the United Liberian Association Ghana (ULAG). Of the 31 participants, nine were representatives from these diaspora groups, while the remaining 22 participants were from civil society, academia, media, and other professional sectors, both within Liberia and the diaspora, who were engaged in debates on citizenship and Liberia's post-conflict development. Together, the participants represented a diverse range of ages, genders, educational backgrounds, income levels, and migration histories. I categorized the participants primarily as either in-country or diasporic, though some participants referenced their ethnicity to emphasize their non-settler background. I also analyzed media commentaries and official documents (Erlingsson & Brysiewicz, 2017)—including policy directives, reports, speeches, and press briefings—produced by the Liberian government between 2006 and 2019 that address dual citizenship and diaspora engagement as well as documents provided by ALCOD's leadership. These official documents spanned the presidency of Ellen Johnson Sirleaf (January 2006–December 2017) and the first year of President George Weah (January 2018–December 2019) and were mostly sourced from the Executive Mansion's website (https://www.emansion.gov.lr).

In this article, however, I focus mostly on how the subjective experiences of diaspora Liberians motivate their claims for dual citizenship in Liberia. In line with Moran's (1999) argument about the contribution of personal and subjective experiences to the understanding of knowledge, I emphasize diaspora participants' lived experiences over conventional cultural interpretations to provide a sense of their perceived marginalization in their host societies and their home country, Liberia. It is worth noting that the study does not treat diaspora Liberians as a monolithic group with a shared pursuit of dual citizenship. Instead, it draws on a sample of participants who viewed dual citizenship as a strategic means of formalizing their belonging

in Liberia. My positionality shaped the research process in significant ways (Vaughan, 2024). First is my outsider status due to my Ghanaian nationality and the physical distance from the field because of Covid-19 restrictions during the data collection period. Secondly, I similarly occupied an insider role as a racialized Black African living in an industrialized Western country as some of the study participants. This dual positionality significantly shaped my relationships with the study participants, facilitated access to certain groups and discussions, and my interpretation of the data (Vaughan, 2022, 2024).

3. On Strategic Citizenship: A Brief Overview

Most studies on dual citizenship have focused on immigrant naturalization in industrialized Western countries, particularly in Western Europe and North America, emphasizing two main arguments (Harpaz & Mateos, 2019). First, these studies show that acceptance of dual citizenship increases the likelihood of naturalization, with variations based on immigrants' countries of origin. Hence, immigrants from low-income countries are significantly more likely to naturalize than those from high-income countries (Bloemraad, 2004, 2006; Skulte-Ouaiss, 2013; Vink et al., 2013, 2019). Second, they examine immigrants' rootedness, suggesting that dual citizens may be less emotionally and politically attached to their new homelands compared to mono-national immigrants, despite often having better economic outcomes (Conway et al., 2008; Mazzolari, 2009; Mügge, 2012; Staton et al., 2007; Yanasmayan, 2015).

When you turn the lens on Africa, dual citizenship research remains notably sparse, with a few notable contributions (Manby, 2016; Nyamnjoh, 2007; Nyarko, 2011; Siaplay, 2014; Whitaker, 2011). Significant here is Pailey's (2021) in-depth examination of Liberia's citizenship regime as it underscores dual citizenship as both an opportunity and a source of tension in Africa, particularly in post-conflict societies like Liberia, where issues of loyalty and national identity are deeply intertwined with the legacy of conflict and state (re)building. Nevertheless, the larger research on dual citizenship allowance in Africa and the more general studies focusing on immigrant naturalization in industrialized Western countries often adhere to a top-down normative approach that prioritizes statistical analyses and shifts in policy and legal frameworks. This perspective, while valuable, tends to overlook the nuanced experiences and agency of immigrants themselves, reducing their complex and varied motivations for acquiring dual citizenship to mere numbers and policy changes.

The strategic citizenship framework aims to address this lacuna. It provides a bottom-up approach that highlights individuals' proactive roles in shaping their citizenship choices and outcomes. Harpaz and Mateos (2019) posit that strategic citizenship operates at the intersection of citizenship's persistent centrality in global inequality and the proliferation of avenues for acquiring multiple citizenships. The emergence of citizenship as an asset with instrumental and strategic value means it can be acquired through wealth or other forms of capital and deployed to secure broader socio-economic opportunities and social advancement (Stevens, 2023). The commodification of citizenship (Harpaz & Mateos, 2019) and its consideration as a form of capital facilitating international mobility have contributed to the rise in dual citizenship legitimacy (Harpaz, 2019a, 2019b). The framework offers valuable theoretical and analytical insights into the complexities of acquiring dual citizenship for instrumental purposes (Harpaz, 2019b; Harpaz & Mateos, 2019; Joppke, 2019; Spiro, 2019). By shifting the focus from traditional state-centric (bounded) perspectives on citizenship, and related policy changes, to a deeper exploration of the strategic motivations of immigrants, this framework offers a more nuanced understanding of how and why individuals pursue dual citizenship.

As a regime of mobility and a site of global inequality (Stevens, 2023), strategic citizenship provides a nuanced understanding of individuals' practical value from dual citizenship and how such strategic value is created within national and global stratification systems. Dual citizenship then encompasses legal and institutional frameworks—such as visas, passports, residence permits, and naturalization processes—that regulate individuals' mobility, but it is also a strategic asset facilitating global movement and access to opportunities (Bauböck, 2005, 2019; Harpaz, 2019a, 2019b; Harpaz & Mateos, 2019; Shachar, 2009, 2021). These studies are crucial as they elucidate the context behind the increasing commodification of citizenship. As Harpaz and Mateos (2019) argue, the strategic citizenship approach helps us to better appreciate arguments that citizenship has become post-national (Soysal, 1995), de-ethnicised (Joppke, 2005), or devalued (Spiro, 1997, 2006).

Nevertheless, by centering global inequality in the meaning and value of citizenship, the strategic citizenship framework renders insignificant, or at best, sanitizes the national identity and territorial attachment inherent in traditional conceptions of citizenship. Read this way, diaspora Liberians' longing for a formalized identification in Liberia despite winning the jackpot of acquiring premium passports complicates the framework's utility. As I detail in Section 5, the case of diaspora Liberians' motivations for dual citizenship in their home country reflected in their continual construction of Liberia as their true home shows that premium passports from industrialized Western countries are sometimes insufficient on their own. Certainly, in the current era of right-wing populism and increasing anti-immigrant sentiments, strategic approaches to citizenship are often met with suspicion and hostility. Racialized immigrants' feelings of alienation and lack of belonging are often exacerbated by their treatment as second-class citizens, where social, economic, and political marginalization prevent them from fully integrating into their host societies (Bernal et al., 2022; Jones, 2012). The fact that immigrants face systemic barriers in securing stable employment, accessing quality healthcare, and participating fully in the democratic process is well documented. The very act of migration, while promising opportunities, often comes with the realization that despite legal status or years of residence, societal acceptance can remain elusive. This estrangement can manifest in casual racism, systemic discrimination, and structural inequalities that tend to uphold a hierarchy of belonging. These marginalizations are not unique to diasporic Liberians. Therefore, racialized immigrants' experiences of othering, alienation, and a lack of belonging in their host countries (Hellgren, 2019; Nawyn et al., 2012; Ocampo, 2024; Udah & Singh, 2019; Wessendorf, 2019) reveal a significant limitation of the strategic citizenship framework. In that, it fails to fully account for the enduring significance of national identity and the complex emotional and cultural ties that drive diaspora communities to pursue continual attachments to their home countries, despite possessing passports from more powerful nations.

4. "The Love of Liberty Brought Us Here": Liberia in Focus

Citizenship regimes are politicized globally. In Liberia, debates over dual nationality have been particularly prominent in the post-conflict era. Liberia's unique position as Africa's first Republic is closely tied to its citizenship laws, notably the automatic loss of citizenship for Liberians who naturalize elsewhere. Additionally, the "Negro clause" enshrined in the 1973 Aliens and Nationality Law and reinforced in the 1986 Constitution, imposes racial restriction on naturalization. These debates over citizenship are long-standing and contentious, tracing back to the origins of the Liberian Republic (Vaughan, 2022). Liberia originated from the coming together of the sixteen official ethnic groups and descendants of freed and formerly enslaved Black Americans, resettled along the Grain Coast—now Liberia—by the American

Colonization Society in 1822. The country's formative years, first as a settler-colonial project engineered by the American Colonization Society and continued by the Black American settlers after the declaration of independence in 1847, have continuously shaped struggles over citizenship and belonging. Before the settlers' arrival, the region's Indigenous groups had developed diverse societies and complex socio-economic systems, already integrated into the global economy through trade with European merchants and participation in the transatlantic slave trade (d'Azevedo, 1969; David, 1984; Leopold, 2006). However, the settlers and their descendants—later known as Americo-Liberians and constituting about five percent of the population—dominated Liberia's intellectual and ruling class for over a century, only granting citizenship to Indigenous Liberians in 1946 (Adebajo, 2002).

As I have argued elsewhere (Stewart & Vaughan, 2024), settler colonialism was the dominant structure that defined relations between the Indigenous majority and the Liberian state, ultimately contributing to the 1980 *coup d'état* led by Master Sergeant Samuel Doe, an Indigenous man. Doe's dictatorial regime further exacerbated the conditions that led to Liberia's civil wars, the first of which began on Christmas Eve 1989, when Charles Taylor's National Patriotic Front of Liberia (NPFL), consisting of around 100 Libyan-trained troops, invaded Nimba County, seeking to overthrow Doe's repressive regime (Ellis, 1999). While Doe's regime triggered the civil war, its deeper causes were rooted in Liberia's political, cultural, and socioeconomic structures, designed to protect the interests and hegemony of the settler class. These structures entrenched significant inequalities—especially in economic opportunities, political power, and distributional outcomes—between rural areas, largely inhabited by Indigenous communities and urban centers. This divide, along with unequal relations between settlers and Indigenous populations, intensified ethnic and class tensions, culminating in Doe's coup and the subsequent outbreak of civil conflict (Vaughan, 2022).

Liberia's two civil wars claimed an estimated 250,000 lives out of a pre-war population of about 3 million, with approximately 1.5 million Liberians displaced either internally or as refugees in neighboring African countries and abroad, including the Americas, Europe, and Australasia (The Advocates for Human Rights, 2009). Many of these displaced individuals now form a significant part of Liberia's diaspora. As the country continues in its recovery, the transition from Sirleaf's administration to George Weah's in 2018 marked a pivotal moment in its progress toward democratic governance. However, debates over citizenship and who can claim Liberian identity have remained contentious, particularly about dual nationality. In the negotiations, diaspora Liberians have generally favored dual citizenship (Pailey, 2016, 2018, 2021). Many diaspora Liberians contend that they were forced to naturalize in their host countries during the crisis years. Aligned with the tenets of the strategic citizenship framework, their naturalization enabled them to access vital services and opportunities, and support for their families during the conflict years by accessing government jobs and other social services typically available only to citizens and permanent residents (Vaughan, 2022). However, the complexity of the strategic citizenship approach arises in understanding why diaspora Liberians, despite obtaining the supposedly prized "premium passports," from industrialized Western countries continued to advocate for dual citizenship in Liberia. In response, public and media narratives often categorized them as "greedy" elites seeking to retain the benefits of their foreign residencies and citizenships while seeking additional avenues to access the socioeconomic and political opportunities of Liberian citizenship (Vaughan, 2022). This characterization is reminiscent of debates on dual citizenship in other migrant-sending countries (Whitaker, 2011; Renshon, 2005).

Nevertheless, in the interviews, opponents of dual citizenship, or those advocating for stricter policies, often caution against a repetition of the historical injustices orchestrated by the Americo‐Liberian hegemony (Vaughan, 2022). Concerns about systemic inequality have generated a deep rift between opponents and supporters as there is still fear amongst some Liberians that the country might return to a period of gross structural inequality if dual citizenship is permitted. Essentially, the settler/Indigenous dichotomy that shaped Liberia's formation until its supposed toppling in the 1980 *coup d'état* (Toe, 2017), has now morphed into an in‐country/diaspora divide. Consequently, demands by diaspora Liberians are often read by some Liberians as a code for a small, powerful, and privileged group's desire to again establish their political and socioeconomic dominance (Vaughan, 2022). This concern is significant and should be taken seriously in the broader processes of post‐conflict reconstruction and development. The following sub‐section delves into dual citizenship claims in Liberia.

4.1. Towards the Allowance of Dual Citizenship in Liberia: From Sirleaf's 2008 Proposal to Weah's Proposition One

On 22 July 2022, the government of former President George Weah approved an Amendment Law that altered Liberia's Nationality Law in two key ways: it revoked the ban on dual citizenship and corrected a discriminatory clause that prevented Liberian women from conferring birthright citizenship to their children born abroad with foreign nationals (Goitom, 2022; Liberian Senate, 2022). This achievement marked a notable success in Weah's presidency (2018–2024), as it seemingly resolved the protracted dual citizenship debate in Liberia. At the US–Africa Forum in December 2022, Weah emphasized that the Amendment Law removed legal barriers preventing some "natural‐born" Liberians from reclaiming their ancestral citizenship (Bondo, 2022; "President Weah's remarks," 2022; Government of Liberia [GoL], 2022). Thereby integrating diaspora Liberians into the nation's reconstruction and development process (Weah, 2023):

> The moral significance of restoring citizenship rights to our brothers and sisters in diaspora cannot be overemphasized. We now call on our families from the diaspora to come home and join us in the noble and patriotic task of nation‐building.

The allowance of dual citizenship has long been the focus of the post‐war governments. Both Weah and his predecessor, Sirleaf emphasized diaspora Liberians' crucial role in Liberia's post‐conflict reconstruction and economic development ("President Weah's remarks," 2022), and so urged them to return and help rebuild a "New Liberia" (GoL, 2008; Weah, 2018a, 2018b). However, central to these appeals for diaspora Liberians to return was the question of their citizenship status, providing avenues for groups like ALCOD to push for dual citizenship legislation. ALCOD, representing various organizations such as the EFLA, the ULAA, among others, advocated on behalf of over 500,000 diaspora Liberians, including those born in Liberia and those of Liberian parentage who had lost their Liberian citizenship through naturalization elsewhere. Recognizing the crucial role of the diaspora population, both the Sirleaf and Weah administrations pursued dual citizenship policies. Sirleaf's 2008 proposal and Weah's Proposition One aimed to unify Liberia and foster a sense of belonging by including all Liberians, both in‐country and abroad, and bridging identity divisions (Vaughan, 2022). However, both proposals ultimately failed.

For example, parliamentary voting on Sirleaf's 2008 dual citizenship proposal was postponed indefinitely due to strong opposition. Pailey (2016, p. 817) notes that this opposition stemmed from views that

"naturalization abroad signifies a rejection of the fundamental tenets of 'Liberian citizenship' as bounded by a single, geographical territory." However, the political climate in Liberia at the time played a crucial role. Sirleaf aimed to reform the wartime government's workforce, reducing civil servants from 69,000 to about 30,000. Her reforms, which included dismissing hundreds of employees for illiteracy or absenteeism (ReliefWeb, 2006), were met with strong opposition and fears of reigniting the civil war (Dolo, 2006), as the government was the largest employer. Sirleaf's ties to diaspora returnees also drew harsh criticism. Therefore, the dual citizenship proposal meant to enable "qualified" diaspora Liberians to return and contribute to reconstruction, angered many Liberians, especially the "Homelanders," to use Pailey's (2021) term. The media and stakeholders, such as the Civil Service Association, leveraged public frustration over the reforms to reject Sirleaf's dual citizenship proposal.

In my interview with Ibrahim, an activist, academic, and one of the many opposers of Sirleaf's proposal, he explained the political climate and the underlying sentiments at the time:

> Nobody trusted the local capacity. Most of the civil servants removed from their position in the name of downsizing were replaced by Liberians from abroad. This was met with massive resistance from the leadership of the Civil Service Association. Beyond the dismissals, they will take you from abroad and put you in a position, and pay you $3,000 a month, while the local counterpart who has been holding a similar position over the years is paid only $200 a month. And so, once they introduced the dual citizenship debate, the narrative was, they wanted to bring people to take all the jobs.

The rejection of Sirleaf's 2008 proposal led to the emergence of two distinct campaigns for dual citizenship: natural-born diaspora Liberians and non-"Negro" minority groups within Liberia. Before Weah's 2019 Proposition One, some diaspora Liberians, particularly ALCOD, sought to distinguish their demand for dual citizenship from that of groups like the Lebanese community, who are excluded from Liberian citizenship based on their racial background. ALCOD's campaign emphasized a shift from an "open" citizenship policy to one defined by the natural-born status of diaspora Liberians. In the interviews, while most participants viewed the racial restriction as racist, they insisted their campaign was not about changing the racial clause. In my interview with Sheila, for example, she explained that some opponents of dual citizenship exploited this confusion to sway public opinion on dual citizenship allowance:

> So, with the dual citizenship conversation, it's two things being had. One is dual citizenship, and the other is non-Black citizenship. And those two are often conflated….Some people don't understand that they're different conversations, and I think some do and take advantage of confusing the masses that may not understand it.

Some of the study participants felt that conflating discussions on dual and non-Black citizenship complicated public perceptions of dual citizenship's impact on Homelanders and undermined diaspora Liberians' legitimate claim for dual citizenship. Unlike non-"Negro" migrant communities, diaspora Liberians were Liberian, aligning with President Weah's (2023) sentiment: "Once a Liberian—Always a Liberian." Consequently, Weah's Proposition One clearly defined these distinctions and included limitations on dual citizens, such as disqualification from elected and certain appointed political positions. This aimed to address Homelanders' concerns about national security, job opportunities, and issues related to corrupt dual citizens. The approval of Proposition One by both the Senate and the House of Representatives was significant, as it

removed legislative hurdles perceived by some ALCOD leaders as deliberate obstructions due to lawmakers' fear of job competition. This shift in the debate from the racial clause to the status of natural-born Liberians in the diaspora clarified President Weah's evolving stance on dual citizenship, contrasting with his earlier remarks that Liberia's long-standing racial clause was racist ("First annual message," 2018). Proposition One was presented as a fair compromise, accommodating diaspora Liberians' demands while addressing the concerns of those opposed. However, Proposition One failed to gain popular support in the December 2020 referendum (Dodoo, 2022; Nyei, 2014, 2021).

Considering the setbacks of the 2008 and 2019 proposals, the July 2022 Amendment Law, which repeals the dual citizenship ban and grants Liberian women equal rights to transmit citizenship to their children regardless of the father's nationality, marks a significant legal transformation in Liberia's citizenship regime. The amendment law signifies a pivotal step towards reconstructing a collective identity that embraces all natural-born Liberians. Nevertheless, while dual citizenship grants specific rights and privileges and can facilitate a legal sense of belonging, it does not fully address the underlying reasons why diasporas often feel they do not belong in either country. Diaspora Liberians experience alienation in their host societies due to their identities as Liberians, Africans, Blacks, and immigrants with distinct cultural backgrounds. Similarly, their transnational identity and affiliation contribute to their ostracization in Liberia. It is this dual marginalization that has driven diaspora Liberians to pursue dual citizenship as a practical strategy towards reclaiming a sense of belonging and establishing a route back to their true home in Liberia.

5. Searching (Lobbying) for a "True Home"

Before the July 2022 Amendment Law, diaspora Liberians argued for reinstating their Liberian citizenship based on their economic potential for national development, their human rights as natural-born Liberians, and their ongoing financial support and contributions to Liberia. In my interviews, however, when pushed to explain their claims for dual citizenship, diaspora participants consistently emphasized a profound need for a true home. They viewed access to dual citizenship in Liberia as integral to fulfilling this need to find a place where they and their children could truly belong. Diaspora Liberians located this need for a true home within a perception of dual marginalization that they experienced in their host countries and when they returned home to Liberia. In Liberia, they felt ostracized by the constant scrutiny of their "Liberianness" and were frustrated by the need to continually justify the "genuineness" of their Liberian identity. On the other hand, they felt "othered" in their host countries and experienced a lack of belonging due to their ethnic minority background as Liberians, Africans, Blacks, migrants, refugees, and all the different social stratifications that suggested they did not originate in their host countries.

The following sections discuss the enduring anxieties of diaspora Liberians and how their perceptions of dual marginalization shaped their claims for dual citizenship before the passing of the July 2022 Amendment Law. I argue that diaspora Liberians considered dual citizenship in Liberia as a *practical strategy* that provided them and their children a route back to their true home in Liberia.

5.1. "You Are Not Liberian Enough": Contested (Liberian) Identity In-Country

We often perceive home as a physical place, but it is also a deeply emotional concept, a feeling. Where we feel at home is a significant component of our identity. Rubenstein (2001, p. 1) describes home as not just

a geographical location but also an emotional space. Easthope (2004) expands on this idea, defining home as "the fusion of feeling 'at home,' [a] sense of comfort, belonging, with a particular place" (p. 136; see also Blunt & Varley, 2004). Thus, home encompasses both a physical place and an emotional space that shapes the identities of diaspora Liberians as individuals and as part of a community. Their sense of belonging or alienation is closely tied to where they feel at home.

Diaspora Liberians often experience a sense of alienation in their homeland, facing constant scrutiny of their identity upon their return. In the interviews, they expressed frustration at having to constantly prove their Liberian identity, particularly due to perceptions that their connection to Liberia has somewhat weakened because of their diaspora status and retention of foreign citizenships. In workplaces and social settings, returnees frequently encounter questions about their knowledge and understanding of Liberian culture. As Sheila, one of the participants, explained:

> You have to prove your Liberian aspect. [They]'re very quick to be like, "no, you're not Liberian." Or "you're not Liberian enough." We want you to prove that you're Liberian. Do you know this food, do you know that food?

Sheila, who grew up in the United States but returned to Liberia following the civil war to work in the public sector, recounted a challenging conversation with her mother before her return to Liberia. They discussed concerns about how she might be treated due to her American accent and other visible markers that might subject her to scrutiny:

> So, moving back to Liberia as an adult working with of course an American accent because I had spent a considerable amount of time in America....I knew my accent would be an issue, but I didn't expect to have to prove that I was Liberian practically all the time. [I would say to my colleagues]: "You know my mother; you know I'm a Liberian. This is not up for debate, yet you're still quizzing me [on my Liberianness]."

It is important to note that speaking English in everyday situations in Liberia readily marks one as well-educated while speaking English with a foreign accent further amplifies this distinction, signaling both elite status and a "foreign" identity. For example, a young economist I interviewed explained:

> From my own experience, people classify others based on their level of education, exposure, travel, and how they live their lives. So, it's like if someone is very educated and conducts themselves with good ethics; they're going to blame you as someone who is an Americo-Liberian, a Congo person, as they refer to it. My parents are from the Bassa ethnic group, [but] they classify me as Congo because of my level of education and how I conduct myself. But I'm Indigenous Liberian.

The scrutiny of one's Liberianness is both political and strategic (Vaughan, 2022). In the interviews, many opponents emphasized the distinction between holding citizenship and truly "being Liberian." While citizenship grants legal status, Liberianness goes beyond that because it signifies a deeper sense of belonging to the nation. As a result, legal recognition alone is insufficient for true belonging; it requires a broader social and cultural acceptance (Rosaldo, 1994). As one of the manuscript's reviewers pointed out, to avoid envy and rejection, Liberian returnees—particularly those who grew up in the country—often adopt a Liberian accent when speaking English, or better yet, switch to Liberian Kreyol to blend in more effectively.

Nevertheless, diaspora Liberians perceived the persistent questioning of their Liberian identity as a strategy used by Homelanders to assert their superior connection to Liberia, claim ownership of the country's resources, and highlight diaspora Liberians' perceived lack of belonging. Despite facing contempt and condescension, diaspora Liberians steadfastly regard Liberia as their true home. In the interviews, diaspora participants consistently referred to Liberia as "back home," underscoring their deep emotional and cultural ties to their country of origin. As Ahmed explains:

> We work and save for back home. We live in America for 20 or 30 years, but because of the need for the Liberian identity, we plan for back home. To fulfil that need, they plan for back home more than they plan for their retirement in America, more than they plan for their children's education in America.

Ahmed, a leader in the diaspora community, switches between personal reflections and representing the broader diaspora community in our interviews. As exemplified in the quote above, he articulates concerns shared within the diaspora community that resonate with his own experiences. Diaspora participants assert that their deep connection to Liberia—its land, people, and culture—validates their sense of Liberian identity. Persistent doubts about their identity and belonging in Liberia have intensified their frustrations because, in their host countries, their Liberian heritage is a central aspect of their identities, and it forms the basis of their "otherness." However, there remains uncertainty about whether this Liberian identity will be fully acknowledged and accepted in their homeland.

5.2. "Liberia Will Always Be My True Home": Lack of Belongingness in Host Countries

Diaspora Liberians consider Liberia their true home and believe that access to dual citizenship will provide them with a formal recognition of their Liberian identity. This formalization is crucial due to the constant scrutiny of their Liberianness. Diaspora Liberians describe home as a place they yearn to return to, a source of freedom, familiarity, and where they have family, friends, and community. Hence, feeling at home signified happiness, security, comfort, and acceptance, and it represented the limitless potential to achieve their aspirations. Their descriptions of home are comparable to how Easthope (2004) defines the concept of home (see also Blunt & Varley, 2004). In my interview with Alfred, he described home as comfort and identified Liberia as the place to where he is emotionally and psychologically committed:

> For as long as I've lived in the United States, I've never felt so comfortable until I went back [to Liberia] six years ago. When I got home to where my family lives, I felt relief that I could do many things without looking over my shoulder to see who would arrest me for just doing some of the dumbest things. That's a comfort level for me....My ex-wife hated hearing me talk about Liberia because she felt we needed to forget about the country and re-establish ourselves here [the US]...but I'm always emotionally and psychologically committed to Liberia. I just have not disconnected myself. I don't know how to do it.

Alfred spoke extensively about his experiences as a child in pre-war Liberia and his return to Liberia following the end of the civil war to help rebuild his home country. He highlighted the sense of community and worth he experienced working in government and volunteering to teach employable skills to young Liberians. He contrasted his childhood in Liberia with his children's experiences in America, emphasizing the lack of communal relations in the latter:

> When my kids come home from school in the United States, they can't even leave the house unless I say let's go to the park….While when I was back home, as a kid, I didn't have such supervision. I returned from school and I was out there somewhere, but everybody in the community knew to watch over the kids. In the US, unfortunately, you cannot do that.

Alfred expressed a deep longing and nostalgia for his homeland, where he found safety, freedom, and community. His desire for his children to experience a similarly unrestricted childhood to his own highlights the profound value he places on the social fabric and cultural norms of his homeland. His yearning for freedom and communal relationships in Liberia underscores a broader critique of the highly regulated lifestyles prevalent in America. Alfred's reflections on Liberia compared to America, resonate with scholarly critiques of migrants' construction of home, often linked to feelings of alienation and estrangement in the diaspora (Parutis, 2006). Nevertheless, Tsagarousianou (2017, p. 57), challenges such simplistic nostalgic portrayals, noting that home, for diasporas, is intricate and can be precarious. Indeed, Alfred's contrast between the communal ethos of his childhood in Liberia and the individualized experience of his children in America encapsulates the broader challenges diaspora communities face in reconciling their past identities with their present realities.

Imma, who had lived in the diaspora for most of his life but had returned to Liberia during our interview also constructed Liberia as his true home:

> Home is where you feel most secure, protected, happy, and can do whatever you want. Home is freedom. Liberia is home….I've spent several years abroad; I've never felt so free, happy, or safe like I am in Liberia.

Ibrahim also emphasized belonging in his construction of Liberia as home:

> Home is where…I feel perpetual ownership of a place. So even if I bought a house in the UK, I still wouldn't consider the UK home. I don't feel [it is] because it's not where I think I belong.

The perspectives shared by Alfred, Imma, and Ibrahim demonstrate that the construction of home can be both a geographical place and an emotional space. Whether the realization of our true home derives from feelings of alienation in another place, as suggested by Parutis (2006), our connection to a home provides us with happiness, comfort, and a sense of belonging. How we construct this place, or space significantly impacts our identity, whether as individuals or as members of a group or country. As Sara Ahmed puts it, the true home is "the very space from which one imagines oneself to have originated, and in which one projects the self as both homely and original" (Ahmed, 1999, p. 320). For example, Alfred spoke of his life in the United States as a transitional phase: "I feel that we are still living the life of a refugee. That I'm going to go home someday, even if I don't." Despite living in America for over 20 years and frequently visiting Liberia, Alfred expressed a deep longing to go back to Liberia permanently: "I will finally be at peace and say, yes, I'm home!" Although most of Alfred's immediate family resides in the United States and he has the necessary documentation to remain there, he still feels like a refugee because he lacks a sense of belonging in America. He also feels a sense of grief about not fully belonging in Liberia, despite finding the most comfort there.

Some of the participants consider their home to be both Liberia and their host country. Often, those who expressed this dual affiliation were either born in the diaspora or left Liberia at a very young age but have been socialized to consider Liberia as their true home. In my interview with Sheila for example, she explained the importance her mother placed on maintaining a connection to Liberia: "My mother has always made it apparent that although I was living and growing up in another country, Liberia was our first home, our first love." According to Sheila, her mother emphasized the importance of preserving their cultural identity: "You don't lose your culture and identity when you cross an ocean or land. And that's what you give your children because that's all you have."

Lazarus is another such participant:

> I came to the US when I was three years old…but I was raised to never forget about where I was from. So, I constantly read about Liberia, and I was constantly told stories about Liberia. I was constantly in tune with the politics that was going on back home as if I was there….So, to me, America is home because this is where I grew up. I fought for this country; I've been to combat in Iraq [and] Afghanistan. But Liberia will always be my true home because of my lineage, my parents are both Liberian, and that's where I was born too. That's always going to be home.

Lazarus spoke of the perks of being a veteran and the fact that his military service and other accomplishments provided him with greater social standing among other ethnic minorities in America. Despite this, he maintains that he is constantly aware of his immigrant status and laments how much it bothers him that he is still discriminated against and must endure racism because of his different sociocultural background: "The whole immigration conversation hits me hard because not only I'm an immigrant, but I'm a veteran."

As highlighted in the narratives above, diaspora Liberians view their racial and ethnic backgrounds as central to their identities and sense of belonging, no matter where they live. While they strive to belong and build new lives in their host countries, they still feel othered due to their Liberianness—evident in how they speak, their preferences for food and music, and their frequent references to "back home." They long for themselves and their children to experience the "freedom" that comes with feeling truly at home in Liberia.

6. Discussion and Conclusion

Diaspora Liberians' search for a true home underscores the significance of the emotional and psychological dimensions of home. Their attachment to Liberia transcends physical return, reflecting a profound need for belonging and identity validation, which is often contested in both their host and home countries. Further, their precarious attachment to Liberia as their true home echoes Brah's (1996, p. 194) conceptualization of home as "intrinsically linked with the processes of inclusion or exclusion and subjectively experienced under given circumstances." Consequently, while access to Australian, American, or European passports provides diaspora Liberians with premium mobility and other benefits valued within the strategic citizenship framework, those premium passports do not offer the thing they most desire—a place to belong and call their true home, where they and their children can claim rootedness. Ultimately, diaspora Liberians' demand for dual citizenship is informed by their racialized experiences in their host countries (due to their racial background as ethnic minorities) and lack of belongingness in Liberia (because of their diaspora status, which underlines the scrutiny

of their Liberianness). They perceive these experiences as dual marginalization, thus motivating their claims for dual citizenship in Liberia—a formalized status that provides them and their children the route to potentially access the "freedom" linked with at-homeness in Liberia. This desire for belonging influenced their advocacy for dual citizenship, not just for practical benefits like mobility, but to assert their right to belong in Liberia.

Diaspora Liberians' consideration of dual citizenship as a practical strategy that provides them with a route back to their true home relates to what Antonsich (2010) calls "place-belongingness," which is the personal dimension of belonging. As seen in the narratives of study participants such as Alfred, Sheila, Imma, and Ibrahim, personalized belonging highlights peoples' attachment to place, be it specific to geography or social and cultural spaces (Anthias, 2013; Yuval-Davis, 2006, 2011). While these narratives emphasize "the feeling of being at home in a place" (Antonsich, 2010, p. 644), diaspora Liberians' feelings of marginalization in both their home and host societies show that personalized construction of belonging is constantly negotiated with the collective. The case of diaspora Liberians' claims for dual citizenship in their home country presents a unique dynamic in the strategic citizenship framework. It departs from the predominant focus on dual citizenship claims in the Global North to consider such demands in a developing, post-conflict country. Their experiences of racism and discrimination in host societies are deeply intertwined with their sense of not belonging, which shapes their agency in continuously constructing Liberia as their true home, despite having acquired the premium passports of industrialized Western countries. As strategic social actors, these experiences play a critical role in their pursuit of dual citizenship in Liberia, recognizing that while dual citizenship may provide legal belonging, it does not necessarily resolve the deeper emotional and social exclusions they face. Nevertheless, the pursuit of dual citizenship is not merely about securing legal rights, but also about reclaiming a symbolic connection to Liberia—a place where they can anchor their identity and sense of belonging in a world where they often feel marginalized.

Still, the strategic citizenship approach offers a framework through which to understand how diaspora Liberians strategically navigated the value of their differing citizenship status across their host and home countries. The framework involves leveraging legal and symbolic resources to maximize benefits and mitigate disadvantages in different national contexts. Diaspora Liberians consider their racial-ethnic background as key to their identities and sense of belonging. They are Liberian wherever they live in the Global North, which contributes to their otherness there because their Liberianness is evident in how they speak and dress, the type of food and music they prefer, or their constant reference to Liberia as "back home." Yet, this Liberianness is not a given as they must continually justify its authenticity to Homelanders who deliberately question their Liberianness to demonstrate their lack of belongingness in Liberia.

Thus, the experience of diaspora Liberians highlights a paradox where strategic citizenship provides them with mobility and certain socioeconomic advantages but fails to fulfill their intrinsic need for a sense of belonging. This tension reveals that citizenship, whether acquired through naturalization or descent, is not just a legal status but an emotional and symbolic construct deeply tied to identity and belonging. As diaspora Liberians navigate their identities within the framework of strategic citizenship, they continuously confront and negotiate their place in both their host and home countries. This dynamic underscores the need for a more nuanced understanding of citizenship that encompasses the emotional and psychological dimensions of belonging, recognizing that the ultimate aspiration for many is not merely to possess a passport but to find a true home where they are accepted and rooted.

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ARTICLE

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Commoning Cosmopolitanism: Solidarity Beyond Capital, Borders, and Sameness

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Abstract

Approaches to situated and located cosmopolitanism offer the opportunity to think of the formation of a universal community, which demands equality and social justice and is rooted in urban and local practices. This article delves into this perspective by connecting the literature on cosmopolitanism, the commons, and solidarity. Based on a sociospatial conception of solidarity, the notion of "commoning cosmopolitanism" is developed as a framework to understand how solidarity forges relationships where both commonalities and diversity can coexist. Three aspects are important to consider: (a) class struggle, as a response to exclusion and domination and the need to think relations beyond the logic of capital; (b) space, since the relationships are constituted spatially, connecting local and global scales and questioning the logic of borders; and (c) community, opposed to closed identities and "sameness," and aiming to include previously excluded groups and establish a common ground whilst preserving multiplicity. Several examples are used to show how commoning cosmopolitanism allows us to consider the universal dimension of urban solidarity and the inclusion of migrants as part of the political community (the cosmopolitan "we").

Keywords

common; commoning; cosmopolitanism; local; solidarity; transnational

1. Introduction

In her comment on Will Kymlicka's article "Solidarity in Diverse Societies," Glick Schiller (2016), who proposes a global conjunctural analysis, criticizes Kymlicka's reflections on welfare states, solidarity, and migrants for two reasons: his advocacy on nationalism and the lack of attention paid to global modes of capital accumulation. According to Glick Schiller, Kymlicka's position would entail a form of progressive nationalism that maintains a

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binary logic distinguishing between members of the national community—though not only native-born—and strangers. This criticism is buttressed by the perspective that Kymlicka's vision reproduces the illusion of the Westphalian system and the independence of the states and their economies.

Global capitalism has contributed to the dismantling of welfare states and creating new forms of accumulation by dispossession. To overcome this dual limitation, provoked by the restriction to the national framework and the omission of the impact of global neoliberalism, Glick Schiller points out that cosmopolitan sociability would be useful to theorize the politics of solidarity. While sociabilities reflect the everyday (urban) interactions among people, despite their differences, cosmopolitanism highlights how those interactions shape common spaces and aspirations of social justice by being together.

This article shares Glick Schiller's approach to combining cosmopolitanism, and its universal dimension, with an everyday dimension, in our case an urban dimension to be more accurate. Cosmopolitanism is quite often associated with global processes of homogenization, the imposition of universal values reproducing colonial values, and a top-down design implemented by the elites (Caraus, 2015; Mendieta, 2009; Mignolo, 2000). However, there is an increasing conceptualization of cosmopolitanism as critical and situated (Glick Schiller & Irving, 2015) where the focus is put on questioning the exclusionary role of universalism, on paying attention to mobilizations, organizations, and interactions in place, and on the articulation of those local dynamics more globally by sharing their demands on social justice. The critical dimension opens a space of contestation to express dissent and to make social conflicts visible (Agustín, 2017; Caraus, 2015; Delanty, 2006). The spatial or urban dimension responds to the need to anchor cosmopolitanism in ongoing practices and avoid any type of abstract community that is based on a form of (exclusionary) universalism. The local approach allows us to ground cosmopolitanism in multiple spaces and to combine commonalities and diversity (Agustín & Jørgensen, 2018; Harvey, 2000; Mignolo, 2010; Sachs, 2010). Thus, cosmopolitanism is, basically, from below, fostered by civil society and social movements, produced socio-spatially, and aimed towards questioning existing forms of domination (and formations of an exclusionary community) by shaping an inclusive "we" and envisioning a just and equal society.

Moreover, Glick Schiller and Irving (2015, p. 5) stress this point by referring to critical cosmopolitanism as how individuals and groups decide to engage with other human beings:

> Cosmopolitanism turns out not only to be about belonging to the world, but also to be about belonging to it in a particular way, one in which a person's situated positioning creates a domain of commonality—however partial, fleeting or contradictory—across categorial identities such as ethnicity, class, sexuality, status, gender and religion.

Glick Schiller (2015) refers to the moments and places of struggle as "domains of commonality." These domains of commonality expand and increase the possibilities of being human together, even when we have our differences. Since cosmopolitanism emerges from social relationships, diversity (different identities) is compatible with commonalities as a consequence of solidarity practices. In this sense, the relational dimension of solidarity (and of cosmopolitanism, by extension) is relevant together with the spatial dimension, as people create common places through their meetings, encounters, and coexistence (Glick Schiller et al., 2011). It is precisely in the sociospatial relation of solidarity (in the formation of a "cosmopolitanism from below") that the creation of the common needs to be taken seriously into account.

In this regard, our objective is to place our research within the existing paradigm of critical cosmopolitanism and contribute by introducing and highlighting the importance of solidarity as a sociospatial relation and commoning to conceptualize cosmopolitanism and its practices. This framework, drawing on the literature of critical cosmopolitanism, solidarity, and urban commons, is grounded in the following aspects: (a) by adding commoning to cosmopolitanism we stress a collective way of organization outside and beyond the capitalist logic (Huron, 2015; Stavrides, 2016); (b) it allows us to focus on spaces where both commonalities and diversity coexist; and (c) it is directly connected with a contentious and sociospatial definition of solidarity to account for how social relations take place and can scale up (Agustín, 2020; Featherstone, 2012).

Commoning cosmopolitanism is, then, defined by how people forge sociospatial relations of solidarity that, on the one hand, are opposed to the logic of capital and, on the other, contribute to shaping a community based on the production of commonalities and the maintenance of diversity.

The structure of the article is as follows. First, we present our framework on cosmopolitanism which introduces the notion of commoning to single out the relevance of three elements (class struggle, space, and community) to forge an inclusive and equal community. Next, we develop each of these elements by using cases that illustrate how cosmopolitanism is being produced. Our objective is, therefore, to show how commoning cosmopolitanism contributes to the literature on situated and critical cosmopolitanism by introducing the practices of commoning to emphasize how cosmopolitanism is socio-spatially forged by solidarity relations questioning the logics of capital.

2. Commoning Cosmopolitanism: Solidarity as Sociospatial Relation

To conceptualize cosmopolitanism, in line with the approaches of situated and critical cosmopolitanism, we consider it important to add two dimensions: solidarity and commoning. The former is defined within the spatial approaches to solidarity (Featherstone, 2012) and the latter within studies on urban commons (Stavrides, 2016).

Similar to what happens with cosmopolitanism, solidarity—in terms of universalism, common identity, or sameness—turns out to be problematic since it can (re)produce forms of exclusion and domination. Thus, it is important to consider solidarity as a sociospatial relation where the encounter between individuals and groups challenges and even modifies pre-existing identities, although it does not imply that a new common identity is necessarily going to be created (Agustín & Jørgensen, 2019). Sociospatial relations have different dimensions (territory, place, scale, networks) which again can be analyzed through different forms of structuration (e.g., bordering, proximity/spatial embeddedness, vertical differentiation, interconnectivity; see Jessop et al., 2008). Here we regard solidarities as rooted in local practices but that also can entail a transnational dimension by connecting diverse local practices and even by imagining a just and equal system where the local practices acquire an interconnected form of global contestation. In this regard, solidarity is essential to conceptualize critical and situated cosmopolitanism as a practice rooted locally that produces a universal dimension by connecting those practices.

Arampatzi (2017, p. 2156) refers to “the spatial practices of solidarity and struggle that unfold at the territorial, social and economy levels, and aims to further understandings of how people and communities contest crises.” The increasing importance of cities in the global context leads to a major focus on cosmopolitanism from an

urban perspective, as well as the challenges of solidarity as a complex phenomenon (especially when compared to other forms of local solidarity like those of rural areas or small environments). When solidarity contributes to forging mutual relations that question both power relations and preexisting identities, cosmopolitanism faces the difficulty of how to create a commonality without blurring diversity and multiplicity.

To grasp the coexistence of commonality and diversity, we introduce the notion of "commoning" to cosmopolitanism to highlight that it is a socio-spatially produced relation (where space for commonalities and differences is enhanced) and that emerges from a social logic that questions and opposes the logic of capital (and the processes of inequality and domination resulting from it). We use "commoning" rather than "common(s)" to focus on the process and the relationship established between individuals and groups, and we apply it to "cosmopolitanism" to express the need for constant openness to avoid the risk of (re)producing closed and/or exclusive communities.

Hardt and Negri (2012) point out that commoning has neither to do with sameness nor with imagining a sole (common) identity by negating the existence of diverse identities. Furthermore, the action of commoning "must be oriented not only toward the access to and self-management shared wealth but also the construction of forms of political organization" (Hardt & Negri, 2012). As a process, social commoning, besides managing resources collectively, is "constituted by the coming together of strangers" (Huron, 2015, p. 964). As mentioned above, commoning is associated with the urban commons which makes the city the site of struggle against capitalism and the commons becomes the way of organizing, cooperating, and interacting outside the capitalist logic. The urban spaces and places, particularly, bring strangers together (Huron, 2015). The question is: How can commoning contribute to producing spaces and identities, where diversity is not replaced by commonality, and differences do not become obstacles to imagining new ways of life and an inclusive universal community? Although negotiating differences is not an easy task, since the relation is not exempt from asymmetric power relations, here we'll connect the notion of commoning with the social dimension of space by Massey (2005). Space entails the engagement with multiplicity and the (re)production of heterogeneity. This *can* imply relations of domination, subordination, conflicts, but we want to highlight how diversity, through the lens of solidarity as sociospatial relations, is (re)produced as compatible with commonalities. Commoning is not sameness, but it is not a predefined object either: "Commoning practices shape both their subjects and their means; commoning practices literally produce what is to be named, valued, used and symbolized as common" (Stavrides, 2016, p. 35). If we apply this to cosmopolitanism, what is universal, who the citizens of the world are, or who the universal community is cannot be predetermined, but they are shaped and constituted in places by individuals and groups. Something distinctive of commoning is that it needs to be free from the constraints and limits of capitalism imposed through enclosures and privatization (Stavrides, 2016). Commoning cosmopolitanism entails, then, imagining a community whose social bonds are made outside (and beyond) the capitalist logic.

As being outside the logic of capital, urban commons are related to autonomy as a way of self-organization. However, we consider it more relevant from a cosmopolitan perspective to reflect on how to move from the local to the global or universal and avoid reducing the commons (or even cosmopolitanism) to a local phenomenon. Stavrides (2014) uses the metaphor of "threshold spatiality" to refer to expanding commoning as the setting of emancipating experiences of sharing, in opposition to capitalist society's enclosures. We find Stavrides' idea of expanding commoning very useful in thinking about cosmopolitanism, as he suggests both challenging the boundaries of established communities and extending egalitarian practices

outside the boundaries of communities. Stavrides (2014, p. 548) presents comparability and translatability as characteristics to be free from the constraints and limits: Comparability consists of “the ground of comparisons between different subjects of action and also between different practices” that is not based on homogenization but on multiplicity; translatability “creates the ground for negotiations between differences without reducing them to common denominators” (p. 548). Translatability also makes it possible to combine spatial practices with the possibility of fostering a common (global) ground where there is room for interwoven multiplicity and unity (Agustín, 2017). Mezzadra (2007) opposes abstraction to translation. Capital becomes global through abstraction and erasure of multiplicity, while social movements use translation to disrupt the “language of capital” through the creation of spaces for freedom and equality; the experiences and practices within these spaces are then defined as the definitive elements to be used as common ground.

Here, let us return to the notion of solidarity as sociospatial relations: it enables commoning cosmopolitanism as it social bonds and social imaginaries, rooted in justice and equality, that question exclusion and domination. In a previous work (Agustín & Jørgensen, 2020), we conceptualized three dimensions of solidarity practices: organization, space, and identity. The three dimensions find some parallelism with the three elements that characterize commoning cosmopolitanism: class struggle, space, and community. Class struggle must not be understood in a narrow sense (class as the working class) but in a larger sense including other types of identities opposed to capitalism such as gender, race, and sexual orientation. As Nancy Fraser says, capitalism develops forms of economic exploitation but also different types of domination related to gender, race, environment, and so on (Fraser, 2024). Thus, the notion of class, in a traditional sense, should be expanded to include other struggles such as anti-racism and feminism. The importance of class struggle is that it reflects the contentious nature of solidarity and critical cosmopolitanism to create spaces and social relations that are outside—and not determined by—the capitalist logic. Space highlights the creation of common spaces, where the private and public are appropriated collectively and there is room to express diversity and establish a common ground, although sometimes momentarily or temporarily. Community is shaped by sociospatial relationships locally, but also transnationally when the practices become interconnected and translated. Whilst the production of common spaces challenges national logics of borders, reproduced also as urban borders, the emerging community, forged through solidarity, contrasts with existing closed and exclusive identities. We summarize the three dimensions in Figure 1.

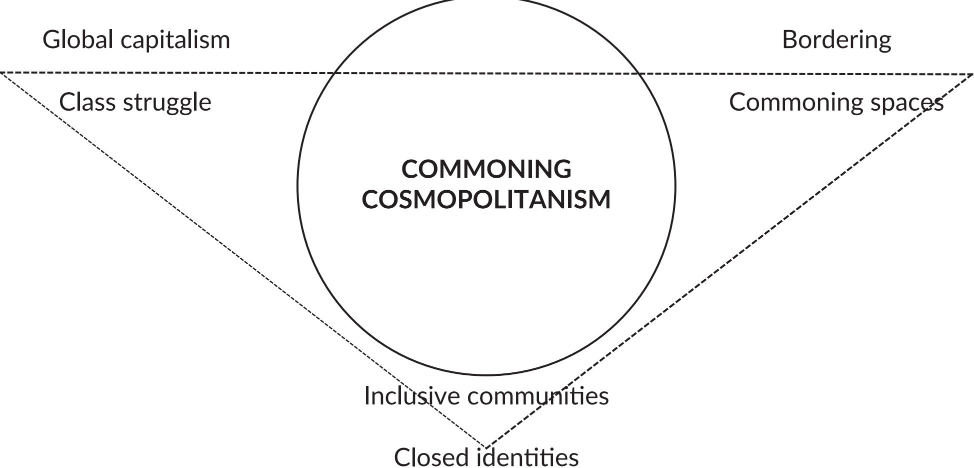

Figure 1. Commoning cosmopolitanism: A three-dimensional model.

We believe that the conceptualization of "commoning cosmopolitanism" could be useful in understanding how commonality and multiplicity can be produced through sociospatial solidarity relations. In the following sections, we want to illustrate these three dimensions with cases of migrant and civil society struggles and solidarity practices that enable commoning cosmopolitanism. Although we focus on one dimension in each section, it is clear that all of them are intertwined, but we want to highlight the functioning of every dimension in shaping cosmopolitanism.

3. Class Struggles: Beyond Capitalism

The following statement was released by the organizing collectives of the Swizz Feminist Strike in 2019. It offers an illustration of how we see commoning cosmopolitanism in practice:

> We all, women*, with or without a partner, in community, with or without children, with or without employment, and whatever the nature of that employment, healthy or sick, with or without disability, heterosexual, LGBTIQ, from the youngest to the oldest, born here or elsewhere, with different cultures and origins, we call for a feminist and women*'s strike on June 14, 2019. We want equality in the facts and we want to decide ourselves about our lives. For this, we will go on strike on June 14, 2019! (Frauenstreik, 2019)

The strikers identify a common anti-capitalist struggle while at the same time creating a new inclusive "we" transgressing gendered, citizenship-based, racialized, generational divisions. It allows us to discuss how the contentious nature of solidarity underpinning class struggle (in a broad sense), such as the feminist strike, creates a common space and social relations not determined by capitalist logics. The precarious positions of the strikers are also produced by global capitalist structures, reifying relations between capital and race, and through protest these subordinated subjects talk back. The 2019 Swiss feminist strike mobilized more than 500,000 people on the 14th of June 2019. It was the largest mobilization since the general strike of 1918. Young women of immigrant origin constituted a large share of the protesters (Prezioso, 2019).

In a European political economy characterized by borders/bordering and precarization of statuses and life conditions, the cosmopolitan "we" emerges as a challenge and rejection of such subordination. Immigrants without political rights make up more than a quarter of the population in Switzerland. As has been shown in the literature on precarity (Jørgensen, 2016), migrants' and refugees' experiences reveal the injustice and arbitrary nature of the social and political order, and the labor and border systems that repress these already vulnerable groups. And due to what we can uncover by studying their experiences, their stories hold within them the elements necessary that make the creation of a cosmopolitan "we" possible. In other words, migrants enable the identification of a "we" and a community based on commonalities and acknowledgment and embodiment of diversity set against the repressive and violent nature of the system, characterized by neoliberalism and global capitalism. The Swizz feminist strikes have over the years incorporated this diversity.

The strikes not only address workers' rights but also broader issues of social production and reproduction, constituting the commonwealth: sexism, care, and social justice. However, the feminist strike shows how sociospatial relations of solidarity between women workers in the public and private sectors have become part of a collective claims-making tool; this also includes sociospatial relations of solidarity particular to immigrant (female) workers, particularly those in the care and service sector. Additionally, the strikes have a

distinct urban dimension, as many of the contentious issues relate to cost of living, availability of care, etc. The feminist strike illustrates the possibility of thinking "class" as an expansive category, encompassing a number of identities opposed to capitalism, to unify the plurality of struggles into a new emancipatory project. This plurality of struggles can also include immigrants and refugees as they experience the same processes of exclusion and oppression through labor conditions and borders. Commoning cosmopolitanism thus is a way of forging social bonds within a common group to challenge a repressive system while maintaining and respecting diversity within the struggle, i.e., not eradicating particular identities.

We find feminist strikes in other national settings also. Here we also find examples of intersections between class, gender, race, citizenship (and the lack thereof) shaping new commonalities and imaginaries of social justice. In Denmark, the feminist strike in 2023 was organized and fronted by women with refugee backgrounds all being active in Trampoline House—a social community center especially catering to people living in asylum—or deportation centers in Denmark. In a similar way, collective campaigns like the 24h sans nous in France in 2010, where migrants stopped working and consuming to show what life would be like without immigrants (Jørgensen, 2016), and the earlier protest event "A Day Without Immigrants" in 2006 organized by Latino immigrants in the United States (see Longhi, 2013), demonstrate the emergence of new political subjectivities through an anti-capitalist project.

Commoning through class struggle (often) has a strong urban dimension combining commonalities and diversity in locally grounded settings, while at the same time allowing for comparability and translatability (Stavrides, 2014). A final example is the mobilization and organization of the Barcelona Popular Union of Street Vendors (*Sindicato mantero*; see Menna, in press). The street vendors are most often illegalized and racialized African migrants, referred to as *top mantas* for the blankets they often use to hold and carry their products. Their practice of street vending is regarded by the state as a criminal activity, which leads to their persecution, but it's worth arguing that this criminalization is radicalized. During the refugee crisis, street vendors organized themselves to highlight their socioeconomic position and marginalization in society. They weren't alone in this endeavor; other social actors in Barcelona, such as local activists from intersecting political spaces, mostly migrant and antiracist, who found commonality in their shared understanding of global capitalism and injustice stood with them. Quoting Menna (in press), who has discussed this mobilization in detail, the tools involved "[mapping] the here-and-now of street vending in Barcelona and paying special attention to working and living conditions of vendors' illegalized ways of life," moreover the coalition between migrants and antiracist groups made an analysis where challenges as "gentrification or securitization of public space were crucial, along with a critical eye on the global crisis of labour." The Union later started a designer clothes series appropriating the derogatory term *top manta*, making colonial violence visible, highlighting economic injustice and deprivation of rights. The mobilization articulates a critique of the capitalist-colonial structure while at the same time appropriating capitalist means to create a space where the vendors are part of the socioeconomic order without letting go of the critique of exclusivist practices and inequalities. Commoning practices here produce a community forged through contentious solidarity that transgresses racial and citizenship-based dividing lines and promote a logic outside/beyond capitalism.

4. Commoning Spaces: Beyond Borders

Borders are the cornerstone of capitalism. As argued by Walia (2021), borders are the nexus where capital and race formation intersect. Borders are deadly and cannot be understood as limited to the geographical

frontier of any nation-state, but emerging at different instances, moments, and places "wherever selective controls are to be found" (Balibar, 2002). Borders create enclosures that again create dividing lines. In this section we discuss how our understanding of commoning cosmopolitanism can create new common spaces and question national borders. Carving out the urban commons and the role of the city is important to pursue this argument. David Harvey depicts urban autonomy, as a form of self-organization, as a bulwark against capitalism. In *Rebel Cities*, he describes struggles for "the right to the city" as an anti-capitalist struggle (Harvey, 2012). This is an open process without any pre-determined meaning involving what we posit as commoning cosmopolitanism. Commoning entails new practices of sharing and caring being outside, or at least not constrained by, capitalist logics. Making the city a common space for all regardless of citizenship status also makes this a struggle for immigrant rights and moving towards moves us beyond borders and nations, towards a world beyond capitalism based on dignity and social justice with the urban as a central scale (Reyes & Russell, 2017).

That said, the main tendency we now see globally, in terms of global governance structures and nation-state responses, is not one of openness but restrictions and deterrence when it comes to welcoming and accommodating people on the move who do not arrive with work or study permits. Although we do see an openness from European countries and the EU towards Ukrainian refugees, this is on a broader scale an exception and more than anything else shows how "protection" and "deservingness" also are racialized categories establishing systems of inclusion and exclusion. The inclusion of Ukrainian refugees from a perceived proximity also paves the way for the exclusion of previous refugees. As we have shown elsewhere, the "normal" is rather what happened across Europe in 2016 and onwards where we saw governments enter a "race to the bottom" in terms of developing deterrence policies to prevent refugees from entering their particular country (Agustín & Jørgensen, 2019). Over a very short period, EU member states initiated "exceptional measures" legitimized by a "state of emergency" that in practical terms breached the principles of the Schengen agreement and thus the European framework for free mobility. Thus, we could identify a total lack of solidarity between member-states, intersecting with and strengthening a humanitarian crisis, a political crisis, and a crisis of mobility.

When we turn the gaze to the urban scale and look at how refugees and illegalized migrants are included in the political and social structures, in contrast with the national scale, it's easy to identify an openness for accommodating these groups. We recall the words of the Mayor of Palermo Leoluca Orlando, in Bauder, 2019:

> We cannot say today that Palermo respects the rights of migrants. Because we have no migrants in Palermo. If you ask how many migrants are in Palermo, then I do not answer 100,000 or 120,000, but none. If you are in Palermo, you are a Palermitan.

These words came from the then Mayor of Palermo and signals a type of municipal resistance as well as commoning of space. Orlanda articulates a politics of presence indicating that anyone residing in Palermo regardless of status is part of the spatial inclusive "we" identity Palermitan offers. It should be emphasized that that is not only a discursive maneuver but also pursued in (policy) practice. Also, in Northern Italy, several municipalities signed an agreement—the "rescue-migrants" pact—setting up a registry of asylum seekers to bypass rules established by the decree. The contestation between the local scale (as the city and municipal scale) and the national one has grown during "the long summer of migration" in 2015. Cities all over Europe

engage in formulating welcoming policies towards refugees, diverging from restrictive national frameworks. The website Moving Cities (https://moving-cities.eu) lists more than 700 European cities that actively support solidarity-based migration policies. We can find good examples of European cities challenging the distinction between migrants and non-migrants and creating a common urban "we" through urban policy frameworks accommodating all regardless of ethnicity and status. One of the cases we have worked with in detail in our prior work is Barcelona. In 2015, the City Council, led by the platform Barcelona En Comú, launched the Barcelona's Refugee City Plan. The plan is conceived as "a citizen space to channel urban solidarity and to set up coordinated ways of participating in its application" (Barcelona Ciutat Refugi, n.d.). It is a reaction against the restrictive politics towards refugees carried out by the Spanish government. The idea of a "refugee city" activates already an imaginary of the city as a place of solidarity, in contrast with the hostility shown by the national government, and connects with the multiple forms of solidarity expressed by civil society (Agustín & Jørgensen, 2019). It emphasizes mutual care as a foundation for urban and common space. The recent book *The Revolution Will be Caring* explores what the future could look like from the perspective of radical municipalism (O'Brien & Abdelhadi, 2022). This effort has seen support from the European Solidarity Cities Network, a network born out of the initiative of Giorgos Kaminis, the former mayor of Athens. The aim of the network was presented as an attempt at institutionalizing efforts on the trans-local scale: to bypass the national scale where possible, prefiguring post-national networks of urban solidarity and cooperation (Reyes & Russell, 2017).

The Seebrücke movement in Germany has mobilized hundreds of thousands, enlisting dozens of German municipal authorities in declaring their cities "safe harbours" for refugees rescued in the Mediterranean (Schwiertz & Steinhilper, 2021). Along the same lines as the Seebrücke network and the Solidarity Cities Network, another interesting initiative showing how a common space for solidarity can emerge comes from From the Sea to the City Initiative. As a response to migrant deterrence policies of European member-states, the network wants to make visible how cities are becoming agents of change for a solidary Europe, taking responsibility for protecting human lives. "Welcoming municipalities are growing in number all over the continent," the network states (From the Sea to the City, n.d.). The network provides institutional solutions at the local scale and does advocacy work at the European scale, but it also seeks to reimagine a welcoming Europe as such:

> The From the Sea to the City Consortium aims to join forces to reimagine the European stance on migration with cities and human rights at the center. With this vision we want to send a strong signal to European institutions that a welcoming and human-rights-based migration and refugee policy is not an option but an obligation.

The above statement parallels Glick Schiller's (2015) claim that "being human together" is a constitutive element of cosmopolitanism anchored in moments and places of struggle. Solidarity manifests through such sociospatial relations as the ones articulated by From the Sea to the City. The network is comprised of the International Alliance of Safe Harbours (IASH), which is a city network focusing on migration and reception. It emphasizes the role of the trans-local scale. The network is transnational but more so grounded in and connected through local actors seeking to develop an inclusive common space for welcoming immigrants.

Returning to our initial argument, these initiatives well illustrate how the urban scale can create a common space where commonalities and diversity coexist. It is a contentious space challenging both capitalist

enclosures and borders based on grounded local approaches that are shared and scaled up in networked forms of solidarity.

5. Expanding Community: Beyond Sameness

Expanding the racial, social, cultural, political exclusivist boundaries of existing communities and closed identities is a challenge. We identify the means to do so and the aim to constitute inclusive communities in the kind of cosmopolitan framework we outline in this article. To illustrate this, we will introduce brief examples taking different approaches to community-building to show how they are shaped through sociospatial relationships forged through solidarity.

The (European in our case) Welcome Refugees movement is one example. As other studies have shown, migrant struggles illustrate "a new area of protests" (Ataç et al., 2016). Angela Davis went as far as to claim that "the refugee movement is the civil rights movement of our time. In most countries across the world migration and refugee issues have come to the fore as well as struggles for justice" (as cited in Chelliah & Petterson, 2016). Her statement illustrates our argument also. Refugee struggles are not only *for* refugees; they expand into a community through transversal solidarities. Looking at the "welcome refugees" movements and actions both broadly, their localized forms show new experiments of sharing (e.g., time, housing, commodities, knowledge) and extend egalitarian practices to include the newcomers and people on the move. As we have shown elsewhere, we can identify turning points during the long summer of migration, which also point towards the articulation and practices of developing inclusive political communities, i.e., an inclusionary "we" as a community (Agustín & Jørgensen, 2019). The emergence of this development can be traced back to key events fostering this kind of "we-ness." One such event took place on 12 September 2015. In more than 85 cities, in 30 countries across Europe, hundreds of thousands of protesters marched under banners of "Refugees Welcome" and "Europe Says Welcome." Citizens participated in marches, demonstrations, and other events during the day of action. The message was equally clear: Refugees are welcome here. In different countries, initiatives have since then sprung up, developing new forms of everyday politics and acts of solidarity (Della Porta, 2018; Guma et al., 2019). Such initiatives illustrate the emergence and maintenance of inclusive communities developing as a counter-force to closed national identities. These forms of inclusion also challenge the capitalist logic of the larger asylum order.

In several cities we find examples of house-sharing initiatives, in some cases formalized through house-sharing platforms, offering people on the move free accommodation for shorter or longer periods. Regardless of the national context we see a universalist inclusion transgressing national distinctions. The everyday politics of the Welcome Refugees movement contests political configurations such as the borders, the asylum regime, the integration policy regime, etc. The movement has managed to create common spaces for daily practices and establish a political community, where commonalities and diversity coexist, again expanding the existing community beyond sameness. Solidarity becomes a means for mitigating differences and creating a common space. Everyday activities such as providing legal aid, medical support, language training, job-seeking assistance, transportation, and everyday donations, including raising funding for family reunifications, etc., all are part of creating an inclusive community. At the same time, differences and diversities are not negated. While the movement articulates the commonalities between people, refugees, and national citizens and "natives" alike, it also emphasizes the importance of personal stories: urging people to listen openly and engage with the experiences of the other and allow stories that

are different from one's own (Agustín & Jørgensen, 2019). It illustrates a process of social commoning shaped by the "coming together of strangers."

The 2015 "refugee crisis" has since been followed up with new crises. The Russian invasion of Ukraine in early 2022 so far has led to more than six million Ukrainians fleeing to Europe. Again, we have witnessed a massive mobilization in civil society in most European countries. The welcoming of Ukrainian refugees, however, also has shown the distinctions within solidarity practices themselves. Several studies show how Ukrainian refugees are framed differently from other refugee groups, often framed to be culturally "closer" to European communities (e.g., Ajana et al., 2024; Alsbeti, 2023). A perceived sameness may paradoxically spur and reproduce exclusivist practices towards other groups. It shows how closed identities are detrimental to inclusive communities. Nevertheless, anti-solidarity practices can also foster the development of inclusive community-building through the enhancement of a common space for commonalities and differences. The mobilizing of right-winged political actors in cities across the UK in the summer of 2024 is an example of the latter. In the aftermath of a tragedy where a 17-year-old youth, born in Wales to Rwandan parents, killed three children and wounded others, rumors spread that the killer was an asylum-seeker. This prompted right-wing attacks on facilities housing asylum-seekers and properties, spaces of denominations, and shops owned by members of non-British ethnic communities. As a reaction to the racially motivated violence, we saw a counter-movement stand in opposition to the polarizing actions and discourse. A broad coalition of anti-racist movements and organizations, trade unions, feminist organizations, local communities, and religious communities all mobilized together and put tens of thousands of people on the street to protest the far-right attacks against asylum-seekers and immigrants in general. Rallying under the slogan "Welcoming Refugees" and calls like "We Won't Be Divided" and "Standing Together" shows how new inclusive commonalities are forged, expanding the understanding of who is part of the "we." Thus, migration and cosmopolitanism are consubstantial. It shows, through everyday politics that manages to forge a notion of an inclusive community, a "we" that stands in contrast to but also serves as a bulwark against far-right channeled hostility and violence, which spurs exclusion, inequality, and segregation.

6. Conclusion

The approach developed by critical and situated cosmopolitanism offers two important contributions: as critical, cosmopolitanism entails a contentious dimension and the possibility of contesting existing forms of injustice, inequality, and exclusion by expanding the cosmopolitan community by/for those who are excluded; as situated, cosmopolitanism is not just a mere abstraction but produced locally, although the local practices and struggles become connected in order to imagine a universal community (still rooted locally). We adopt this approach by adding the idea of "commoning" to overcome the dichotomy between commonality (not sameness) and diversity (or multiplicity). We argue that the process of "commoning cosmopolitanism" is defined by the interplay between class struggle, spaces, and community, and solidarity becomes essential in understanding how sociospatial relationships are forged and contribute to establishing a common ground while maintaining, at the same time, diversity. As far as commoning cosmopolitanism implies expanding the political community as well as envisioning a more just and equal world, it also entails a contentious dimension (which is the basis for solidarity relationships). Therefore, the proposal for a global community and a situated universalism is made in opposition to exclusive universalism (global capitalism, colonialism). We refer to it as "class struggle" where "class" refers to the interconnection and/or articulation of multiple oppressed identities against the processes of accumulation and expropriation by capital.

The creation of common spaces enables the possibility of conceiving the city as a space for solidarity and developing relationships that question the regimes of borders. Finally, the community emerging from solidarity encounters is inclusive and pluralistic. It can be seen as a community through sameness, founded on shared common ground and the preservation of diversity. The cases we used illustrated how this framework for commoning cosmopolitanism works in practice.

We believe that this approach to cosmopolitanism and solidarity can benefit from further research in analyzing the production of cosmopolitanism at the local and transnational scales. There is also one aspect that has not been fully developed in this article but would be worth addressing: continuity and stability. How this sense of community, emerging from solidarity relations, the questioning of borders, and the search for alternatives to capitalism, can gain continuity and be developed? Placed cosmopolitanism is shaped by the unevenness of the situation (Akoka et al., 2021), since the solidarity relations established do not mean that inequality and subordination are totally suspended (not just outside the common places but also within them). In other words, how can "institutions of expanding commoning" be created (Stavrides, 2014) or how can established alliances of the commons be shaped (Hardt & Negri, 2012)? While we have focused on how commoning cosmopolitanism can contribute to configuring a just and equal society at the local and global levels, the question of how to give continuity and stability to emerging forms of organization, inclusive communities, and transnational connections remains open and requires further reflection and studies.

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ARTICLE

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Dancing Hands: On Neurodivergent Embodied Knowledge

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Abstract

This article gives insight into my artistic research project Stimming a Space, which explores “stimming”—auto-regulative behaviour—as a means to make and hold space for neurodivergent individuals within the art world. The umbrella term “neurodiversity” describes developmental conditions such as autism, ADHD, or dyspraxia. Neurodivergent individuals stim extensively due to frequently occurring sensory issues. I argue that parallel to movements of “queering” public spaces that result in increasing safety for all gender identities, “cripping” spaces through adjusting them to neurodivergent needs can be beneficial to everyone in a competitive capitalist environment such as the art world: from education to art spaces and academia that host an increasing number of artistic researchers. Diversity in the art world is not a luxury but a need. Despite recent motions for inclusion, disabled artists still encounter “ableism,” othering, and exclusion. Lack of diversity perpetuates stereotypes and mental obstacles. From an “emic” perspective, the research project Stimming a Space approaches neurodiversity as a condition affecting the entire body instead of solely focusing on symptoms such as speech impairment or executive dysfunction. As a counterweight to much literature that problematises stimming as “disruptive behaviour,” this autoethnographic research approaches it as a performative tool and claims that exploring the entire “bodymind” and embracing stimming as a radical act of self-care can enrich current research on neurodiversity. Opening up the art world is not a mere act of solidarity—lived inclusion makes it more accessible and safer for everyone.

Keywords

ableism; accessibility; artistic research; auto-ethnography; crip; disability studies; diversity; inclusion; neurodiversity; stimming

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1. Introduction

Discussions around diversity, equity, and inclusion (DEI) in the arts are gaining momentum, mainly focusing on overcoming racism and sexism. Ableism (discrimination and prejudices against people with disabilities) is slowly finding its place in the discourse as well, but efforts to overcome it are often reduced to discussions around accessibility for visible impairments.

When it comes to understanding the accessibility needs of neurodiversity, there is still much work to be done. Neurodiversity is a term embraced by neurodivergent individuals grouping a range of neurodevelopmental conditions such as autism, ADHD (attention deficit hyperactivity disorder), or dyspraxia. Next to its more stereotypical presentations, such as sensory or communicative issues, many traits are invisible on the surface. One of the reasons for the rise in diagnoses in recent years (Yoo, 2013) is the growing coverage of these more hidden aspects that motivate neurodivergent individuals to seek information (Boyle, 2024; Ghorayshi, 2023). This development is particularly relevant for the art world that hosts a great deal of neurodivergent talent.

As part of the neurodivergent population, women move within a two-fold invisibility. This includes trans women—the strong link between autism and gender nonconformity has been known for over a decade (de Vries et al., 2013). Not only are their needs less obvious on the outside than, for example, a visual disability, neurodiversity also presents quite differently in girls and women (Simantov et al., 2021; Young et al., 2020). This leads to twice or even four times fewer diagnoses than in their male peers (Ramtekkar et al., 2010; Ratto et al., 2017; Zeidan et al., 2022), as they encounter medical bias through evaluation forms oriented on a predominantly male presentation (Cook et al., 2024; Quinn & Madhoo, 2014). Furthermore, their symptoms, such as trouble connecting with peers or feelings of deep isolation, are often overlooked, as women tend to “mask” more than men. “Masking” describes the process of hiding one’s neurodivergent traits. Due to their high masking tendencies, neurodivergent women’s needs regarding self-regulation tend to be expressed in much more subtle ways—society’s pressure on the female body is real.

Research focusing on neurodivergent traits in women has only been gaining momentum in recent years (Attoe & Climie, 2023). Regarding ADHD, studies are showing more and more evidence that many girls and women present “atypically”—meaning not like men. ADHD presents in the female population more often as the inattentive type without the hyperactivity, the “dreamy girl” (Young et al., 2020). This new information is shedding light on the effects that undiagnosed ADHD can have on girls and women, thus slowly closing the gap between the number of neurodivergent women and the ones receiving adequate treatment and support (Kok et al., 2020).

Between this emerging field of research on female neurodiversity, current efforts to make institutions more accessible through embracing diversity (Cachia, 2024; Cairo, 2021; Van Eertvelde, 2024), and the growing field of disabled and care-centred art practices such as Kai Syng Tan’s Neurodiversity In/& Creative Research Network or Manchester University’s Care Lab, is where I situate my artistic research project Stimming a Space.

2. Research Question

Stimming a Space seeks to contribute to efforts to make institutions in the art world safe and supportive for everyone by focusing on the following research question: How can artistic research improve accessibility for neurodivergent women in the arts?

My position as a neurodivergent artist creates an opportunity to enrich current discussions on inclusivity with a positionality that seeks to broaden current knowledge with neurodivergent embodied knowledge. A diagnostic trajectory, which for women typically happens at a later stage such as high school or university, is a life-altering experience but often leaves one with more questions than before. On top of that comes the realisation that one's personality must be fully de- and reconstructed as identities are hidden under layers of lifelong masking. I wish to contribute to closing the gap between the information available within a classic medical diagnostic trajectory and the abundant knowledge shared by neurodivergent scholars, neurodivergent communities, and social media creators. I propose that accessing this pool of information can help to not only orientate oneself after a diagnosis but also provide crucial tools to sustain durable and successful careers. I apply this hypothesis to the art field that welcomes many neurodivergent women while often lacking supportive structures they could rely on, as they are frequently mis- or undiagnosed and have, therefore, no access to possible support tools (Able et al., 2006; Arnold et al., 2015; Schechter, 2018). My multidisciplinary approach to this question ties artistic research to design-driven research that aims at including female neurodivergent voices, following the disability activism slogan "nothing about us without us" (Charlton, 1998, p. 3).

My PhD research project Stimming a Space focuses on the unity of body and mind. When it comes to accessibility for neurodivergent individuals, many of the adjustments made aim at symptoms of the mind, such as forgetfulness or social anxiety. I state that neurodevelopmental conditions must be considered to a higher degree as a phenomenon that concerns the entire body. The physical needs of a neurodivergent "bodymind" (I use this term from the disability movement to underline the non-duality of mind and body) cannot be separated from mental or psychological ones. To explore these physical aspects, I focus on a phenomenon called "stimming" (self-stimulatory behaviours) as I encountered many misconceptions about it in the medical literature. As neurodivergent individuals often experience over- and/or underwhelming sensory input, they resort to self-stimulating their nervous system to regulate themselves. For example, rocking back and forth or playing with one's fingers can help reduce nervousness.

When I started reading up on stimming during the process of being diagnosed myself after graduation, I came across articles describing stimming as pathological and disruptive behaviour (Bodfish et al., 2000; Bourreau et al., 2008). They were mainly written for an audience of medical and behavioural professionals or instructing parents of autistic children on how to deal with a range of harmful stims. Potentially harmful stims like chewing or picking one's skin need to be considered, but they do not reflect the incredible variety of self-stimulatory behaviour. Furthermore, until this day, stimming is often merged with special interests and activities into one "problem" that needs to be addressed (read: fixed) as "RBB" (restricted repetitive behaviours; see Root et al., 2024). In these texts, information on stimming was limited to problematic behaviour to such an extent that I almost refrained from engaging in a diagnostic trajectory, thinking I could not possibly be autistic as my lived experience did not resonate with what I read about stimming.

The better-known forms of stimming are swaying movements like rocking back and forth or rhythmically flapping hands, but stimming implies all kinds of self-regulatory behaviour (Pugle, 2024; Watson, 2024). All senses can be stimulated through stimming—there are auditory stims like listening to soothing sounds, haptic stims like touching specific textures, motoric (movement) stims and vestibular stims (stimulating our sense of balance), visual stims like watching moving lights or sparkles, and even vocal stims like repeating words that feel good ("echolalia") or humming. Stimming also extends into the perception of the body within itself (interoception) and within the space (proprioception).

One defining feature of stimming might be its repetitive nature, like swaying back and forth for a while or stroking surfaces repeatedly. Stimming is not a uniquely neurodivergent behaviour. Most people catch themselves occasionally tapping their feet when impatient or twisting their hair when concentrating. A mother humming for her child is stimming in coregulation, and children naturally stim a lot as well. However, many neurodivergent individuals keep doing it while growing up. It is as much a natural expression of our body as it helps us to navigate environments that often do not grant us a sense of safety and connection. As the outside world can often be too much and our brains are constantly processing significantly more information than a "neurotypical" (a non-neurodivergent) brain (Beopoulos et al., 2022), stimming is, for many of us, what keeps us together in an overwhelming world.

Other than in the (mental) healthcare field, where it is widely used (Molloy et al., 2024; Scanlan & Novak, 2015), sensory modulation is not seen as a widely acceptable regulation technique. Only recently can sensory rooms be found during cultural events to enhance accessibility, as realised by the cultural access organisation Staging Access in Flanders.

Recent literature has shed light on the importance of stimming in education (Tancredi & Abrahamson, 2024). Yet there are still few contributions of neurodivergent authors that approach and celebrate stimming as self-care from an "emic" (insider) perspective such as Jason Nolan's *Embodied Semiosis: Autistic "Stimming" as Sensory Praxis* (Nolan & McBride, 2015), which sheds light on the wide range of stimming behaviour that is not only beneficial and nourishing to the neurodivergent soul, but that also functions as a life-supporting tool.

To understand neurodivergent qualia, one needs to listen to lived experience. I focus on stimming as an expression of a neurodivergent being. Stimming touches upon many issues that neurodivergent individuals face while navigating an environment made by and for neurotypicals. Leaning into Jakob Johann von Uexküll's description (Von Uexküll, 1909) of the "umwelt" (the surrounding world or phenomenal world) as an approach to describe what I would like to call a "neurodivergent cosmology," I explore stimming as a behaviour that allows us to be in the world. Being neurodivergent feels to me as if the boundaries of my existence are too porous: I experience lights, noises, and textures much brighter and louder than most people. This "hyper porosity," as I would coin it, is constantly present and makes it more difficult for me to feel good not only within my surroundings but in my own body as well. Stimming feels like a reconciliation of these two areas—when I stim, the outside slightly fades out, while I get back in touch with my inner world.

I argue that the lived experience of neurodivergent individuals is valuable in understanding, navigating, and accommodating neurodiversity. My attempt is, therefore, to draw from my own embodied experience as much as from the overwhelming amount of information that is shared within neurodivergent communities (such as life hacks, diagnostic tools, mental health, and advocacy tips) that unfortunately to this day rarely finds its way

into the medical field. Texts by neurodivergent scholars add positive and empowering language to this pool of information (Bernett, 2022; Walker, 2021; Yergeau, 2017). Through engaging in auto-ethnographic research within my creative practice, I seek to obtain new information on how this neurodivergent embodied knowledge impacts my artistic path. I propose that making and holding space for stimming can be a powerful addition to the tools institutions have started to put into place to support neurodivergent individuals, such as access support from the UK Council of the Arts. Leaning into the growing field of neuroqueer theory (Gernsbacher & Yergeau, 2019), crip theory (Dokumaci, 2018), and crip choreography as suggested by Rutgeerts et al. (2024), I am exploring how thinking about accessibility touches on positionality and language. The term "cripping," coming from "cripple," emerged in the late 20th century. It has, through crip theory, become a way to critically reflect on societal structures of marginalisation (McRuer & Berube, 2006). A room or an institution can be cripped, even time ("crip time"), as an expression of the different temporalities a disabled person might have to navigate—think waiting for help to board a train, or the obstacles in planning when one navigates chronic pain or fatigue. Crip theory confronts us with ableism embedded into societies and therefore internalised by the individual.

With my doctoral research, I explore how outgrowing my own internalised ableism lets me trace a trajectory of growing into a proud neurodivergent, creating and exploring alternative ways of thinking, dreaming, and enacting creative practices. As Patty Berne, co-founder of the disability justice performance project, words it: "Crip life invites us into fierce creativity" (as cited in Mills & Sanchez, 2023, p. 9).

In addition, disability is the only minority that we are all very likely to be part of at some point in our life. Showing solidarity towards this minority can be argued to be beneficial for every member of any given society. By implementing measures that represent a diverse population, everyone will profit from it:

> [As] everyone who is born holds dual citizenship, in the kingdom of the well and in the kingdom of the sick. Although we all prefer to use the good passport, sooner or later each of us is obliged, at least for a spell, to identify ourselves as citizens of that other place. (Sontag, 1978, p. 3)

3. Methodology

3.1. Auto-Ethnographic Research

I started this research from a rather unique position: My own neurodiversity had been diagnosed just months before I engaged in this project. I was discovering it as a new territory, feeling like a traveller of two different worlds. I navigated the first with a lifelong feeling of never belonging, and in the second, I felt like an intruder—yet welcomed ever so warmly. Everything suddenly made sense. The first year of research was therefore dedicated to a thorough auto-ethnographic investigation into the effects of cripping my creative practice to gain detailed insight into the needs of a neurodivergent woman regarding her artistic career. My goal was to document a first-hand experience of applying shared neurodivergent embodied knowledge to my work routine. I was curious to see to which degree it would corroborate my proposition that neurodivergent knowledge should be shared widely as it can provide meaningful support for others. The goal of this exploration was, therefore, not to formulate a universal key to navigate the art world as a neurodivergent woman, as experiencing and navigating it is different for everyone. As Julia Clausen puts it in her master thesis on self-advocated autistic gathering:

> Defining Autism is a bit like trying to define what makes someone or something alive—there is a practical answer with arbitrary boundaries, with different cultures picking different places to put these lines—but at the end of the day it is as fluid as all humanity and all life…it is part of everything. (Clausen, 2023)

I would rather see this investigation as a care-oriented exploration of how things can be done (and, before that, imagined, thought, and named) differently. It inspires me to lean into Lockwood Harris' work on reflexivity as a relational and embodied practice of care (Lockwood-Harris & Fortney, 2017).

The first year consisted of two main pillars: implementing supportive tools and stimming.

For the first pillar, I focused on measures that I learned through other neurodivergent individuals and social media channels, with particular interest in women sharing their diagnostic trajectories. Even if I have been moderately successful in my artistic career so far, I struggle severely with time management and episodes of exhaustion. Curious to find out how much my way of working was affected by my neurodiversity, I made a list of life hacks and started implementing them one by one while observing changes in my artistic practice and keeping track of the outcome (see Section 4.1).

Simultaneously, the second pillar consisted of a deep exploration of stimming to investigate its relevance for my neurodivergent bodymind. Over six months, I implemented stimming into my artistic practice. This was necessary as I had only a vague image of the stims that I did as a child, while being certain that finding out how my body would behave "naturally" could be an important entrance point to thinking about accessibility. Furthermore, I filmed myself to document this process and create video material (Figures 1, 2, 3) for further investigation (see Section 4.2).

Figure 1. Haptic stim.

3.2. Artistic Exploration

In the second year, I started working with different media (filming, drawing, painting, and dancing) to conduct an artistic exploration into documenting stimming with a larger pool of media than the one I am used to as a photographer, my camera. The goal of using different artistic tools was to approach stimming without a potentially familiar and, therefore, limiting artistic language, as I understand stimming to be pre-verbal and ephemeral in its appearance. I wanted to come to a deeper understanding of the movements

and the circumstances in which I resort to them. For this phase, I partly cooperated with other artists, such as a dancer and a videographer, working with "scores" that structured our interactions. In year three, this will expand into a collaborative development of a stimming choreography as one of the outcomes of this research (see Section 4.3).

3.3. Design-Driven Research

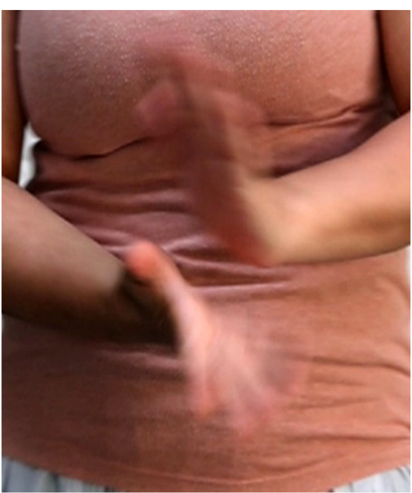

Figure 2. Motoric stim.

In year IV, the findings will be used to develop an online platform assembling resources for neurodivergent individuals and their allies, with a focus on the art field (see Section 6.)

4. Research

4.1. Year I—Cripping My Practice

Departing from my statement that embodied knowledge is valuable in thinking neurodivergent accessibility, my research started with implementing tools I had come across while seeking information after my diagnosis, realising that much neurodivergent culture (and mutual support) happens online. I kept a diary while slowly adding measures I deemed interesting to me and tracking different criteria such as the average time needed to start a task, the ease with which I transfer from one task to another, and the ability to maintain focus or ability to stop an activity. This way, I could see which tools served me and to which extent they supported my productivity. Here are some examples:

- I started by listening to my body's need for rest. Having experienced burnout at the start of the PhD required me to take much more time for my mind and body than anticipated. This confronting realisation, however, made the implementation of these tools even more critical
- I would, furthermore, block my tasks into time blocks that followed my natural rhythm. Many ADHD individuals experience a delayed circadian rhythm (Lunsford-Avery & Kollins, 2018). I started accepting that I take a while to be fully focused and put off carrying out tasks requiring plenty of dopamine (for deep concentration) into the afternoon. I also made sure to take regular breaks (setting alarms), hydrate and move for several minutes (inciting dopamine release), and not wear myself out by ignoring my body's

needs. I used a visual timer to keep track of the time blocks. Through these adjustments that would be finetuned depending on my energy levels on a specific day, I could embrace my natural variations in focus and plan my routine around them.

- When these measures were in place, I also started adjusting my diet: avoiding sugar, replacing snacks with complex carbohydrates and fats to avoid concentration peaks and abrupt attention declines, and cutting down on coffee.

During this period, I was part of the Cripping the Space collective that strives for the inclusion of disabled artists in the cultural field in Flanders. This role, while sensitising me for the work still ahead regarding diversity in the arts, helped me greatly in this process of taking the space I needed.

4.2. Year I—Stimming as a Way to Come Back Into the Body

In line with my proposition that neurodiversity affects the entire body and that therefore its needs should be considered when discussing the inclusion of neurodivergent individuals, I was eager to understand how stimming would affect me and, as a possible consequence, my practice.

I departed from a very limited understanding of stimming. It was only when I started looking for information online that I discovered a colourful and vibrant neurodivergent world where I learned what stimming really was: a joyful expression of neurodivergent existence (see initiatives such as Everybrain or Neuk Collective). Diving into these realms felt as if I entered a new universe—imagine having heaps of internalised shame about your existence (the things you like, the way you dress, the way you express emotions) being turned into one big celebration of these very characteristics. Hence, my use of the term neurodivergent cosmology. It really felt as if I was entering a world with different natural laws, suddenly being unconditionally accepted for being who I was.

The process of diving (back) into stimming was an interesting path with an unexpected outcome. Before I started, I thought stimming would help me to feel more relaxed or energised. I started actively stimming while implementing the above-mentioned tools and strategies. Nothing prepared me for the deep emotional journey I was embarking on.

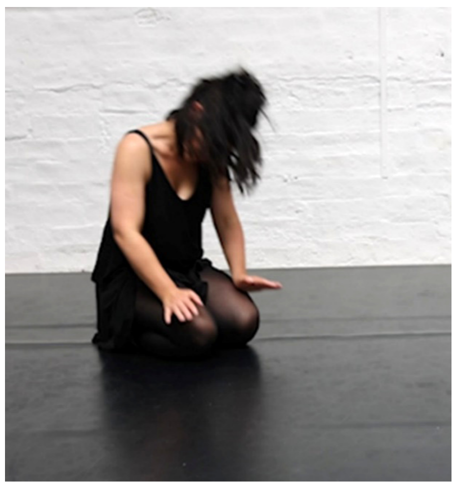

Figure 3. Motoric and vestibular stim.

During the first months, I would stim every morning in my studio for a moment—I would breathe deeply, close my eyes, and allow my body to move freely. This exploration initially felt strange, somehow artificial, and, at moments, frankly embarrassing. I felt like I was walking a territory that was not mine and where I did not belong—as if I was appropriating someone's language. The doubts that I had during my diagnostic process about whether I could be autistic or not arose more strongly than ever. It seemed that initially these exercises pulled me out of the neurotypical world but did not let me into the neurodivergent world, either—my mind was filled with the exact prejudices I was trying to overcome. It was only later in the trajectory that I learned, once again through online channels, how very common this feeling was for late-diagnosed neurodivergent people, especially women.

Moving through this initial discomfort, I started remembering gestures and movements that my body expressed when I was a child (Figure 4): stroking my clothes over and over, touching my lips, swaying back and forth, stroking my legs when kneeling. Tapping surfaces or touching the tips of my fingers in a specific order—it all came back. Over several months, I held this space, feeling a sense of relief that I had no words to express. I was still stimming exclusively in private. I was still quite hesitantly exploring this tactile and motoric territory that I slowly realised I had left behind due to feelings of shame. Over time, I noticed that my body started to engage in these freshly remembered gestures when outside, too: I caught myself swaying back and forth at a bus stop. I was fidgeting while talking to students. I stroked my neck over and over when tired and overwhelmed.

Figure 4. Haptic stim. Source: Emiel Van Den Daele.

Instead of simply expanding my knowledge on neurodivergent culture and growing as a person (which was my expectation), I was suddenly caught in a period of very intense emotions: real anger and frustration, followed by an episode that I can only describe as mourning. Those emotions were confirmed by many late-diagnosed women I spoke to: anger and frustration about the obstacles that did not have to be there, at the misunderstandings and the lack of support, followed by a period of real grief about a life that could have been lived differently. It was as if, through stimming, I released a cascade of emotions I had kept suppressed throughout my life. While this process repeatedly left me overwhelmed and at a loss for words, it also felt as if I was stimming myself into my new neurodivergent territory. My body started to find its natural place in this expanding reality. What felt like stripping away a lifetime of masking, was, through allowing this unfolding of my neurodivergent self, a coming home.

I started dreaming of facilitating a space in which this raw side of me could simply exist, a room that I "could enter where my experiences were comprehensible, where I didn't have to apologise, offer a tortuous explanation of myself or turn myself into a joke" (Limburg, 2021, p. 57).

4.3. Year II—Artistic Exploration

In this phase, I continued my stimming explorations but focused on finding different ways to approach my own (motoric) stims to come to a deeper understanding of the movements and effects stimming has on our bodyminds. To approach stimming from different angles, I explored various media such as photography and film (which I am familiar with as a visual artist) but also sketching and drawing (Figures 5 and 6), which to me feel like a foreign (artistic) language.

Figure 5. Sketching the stimming body.

Figure 6. Sketching a stim.

Inspired by Ulrike Scholte's suggestion that drawing can play a role in the perception and construction of space and, therefore, not just depict but also analyse it (Scholte, 2022), I was curious to find out whether drawing would change my perception of my stimming body within the space. I was interested in what the body produces in a language in which it is not yet proficient. As I have no drawing training, I cannot aim so much to create aesthetically pleasing results, but my body can still enjoy translating what it feels and sees into a foreign vocabulary that is not impaired by subconscious artistic and maybe aestheticising choices. This way, I hoped to find unexpected information regarding the movements, as I was not used to observing and dissecting them this way.

As task initiation and transitioning between tasks are challenging to me, in this phase I worked with scores to create a repetitive and reliable frame for production and reflection. I wrote them to create precise frameworks in which to execute an action (think of a theatre score) according to my needs. After a first "settling in" moment during which I tackled smaller tasks to start the day with a clear mind, I cut the remaining time of the day into blocks of one hour: 25 minutes of action, 25 minutes of reflection, while allowing myself 5 minutes of relaxation and some minutes as a buffer for transitioning.

Sticking to this format made it easier for me to tackle major tasks while getting less distracted. It also prevented the negative side effects of hyperfocus (such as forgetting to drink or eat).

I then started to work with dancer K. to explore the rhythmicality of stimming and work towards a participative choreography. My first impulse was to work on a choreography that somehow could explore how stimming movements can be interpreted as gestures of care. We met several times, and during our common exploration, I came to realise that my initial idea to use stimming as a performative tool was a proposition that stayed very much at the surface. I was thinking in terms of aesthetic choices again, of visual impressions, of orchestrated movements. Working with K., despite—or because of—my ever-fluctuating levels of energy, made me understand that it would hold more potential for this research to explore how a choreography could depart from the needs of neurodivergent bodies. This would be in line with my research question which seeks to investigate how stimming can lead to a better understanding of the needs of neurodivergent bodies regarding accessibility.

I learned about the three "spheres" of dancing: time, space, and energy. I could not help linking them to my practice of stimming, as it anchors me so deeply within time and space and affects my energy so profoundly. We explored how stims changed while playing with these factors: slowing them down, doing them while walking across the room, and moving with softness or determination. It taught me to which degree stims really live a life of their own and can only be controlled or "made conscious" to a certain degree until they lose their liberating effect and stop touching those sweet spots in our brains that help us to relax and come back to ourselves.

My next steps will explore how such a choreography could be constructed, as I am curious to develop circumstances in which stimming can be facilitated without being forced or limited, as it then seems to lose its self-regulating potential. As many fantastic disabled creators are working in dance (Bersani, 2018; Kuppers, 2023; Sheppard, 2023), the field of neurodivergent dance and choreography is still small. Some creators are doing very interesting work in that field in the UK and US (Davies, 2020; Dye, 2022; Martin, 2024; Watson, 2024), but in Flanders, there is no field of neurodivergent dance creation. I am currently exploring possible partners to work with in Belgium.

5. Findings

5.1. Year I—Cripping My Practice

Through the concrete adjustments implemented in the first year, I realised that it was more important for me to get into a healthy state of focused creative flow than to follow a schedule for which my body is not made and that inhibits my performativity. By timing my (rather atypical) work hours, including research, networking, reading, and counting a monthly average, I realised that I was not less productive than my peers. Accepting and adjusting to these natural fluctuations gave me a sense of peace of mind since I stopped constantly feeling as if I was not performing enough. It gave me the confidence to unapologetically take a day off when needed. This took immense pressure off me and contributed to lowering my stress levels significantly. My racing thoughts at night became more silent; I could fall asleep better and earlier. My anxiety symptoms improved as well. A chronic inflammation I have had since my early childhood was appeased for months on end as my nervous system learned to relax profoundly.

It became clear that my practice could be cripped towards my personal needs while not compromising on the quality of my work. In those twelve months, I took part in two exhibitions, two scientific conferences, and a residency in Scotland while regularly travelling to France for embodiment courses and finishing a major publication. This underlines my proposition that listening to our needs instead of adjusting to formats that society deems normal can be a liberating and empowering gesture. If more individuals can implement a work routine that fits their needs while being equally productive, the prioritisation of mental and physical health can become more widely implemented.

5.2. Year I—Stimming

I started understanding stimming not as an added value to my daily life or a funny quirk to be cultivated but as an elementary part of my wellbeing. Stimming more and more (un)consciously throughout my days turned what felt like a newly gained habit into an integral part of my life. It profoundly altered my daily experience while increasing my ability to deal with sensory overwhelm, uncomfortable social situations, and waves of anxiety. This confronting realisation confirmed my proposition that stimming is an integral part of neurodivergent life. I am not stating that one cannot be neurodivergent if one does not stim, everyone is different. The question remains: How many of us neurodivergent people have their stims buried deep without knowing it? My proposition that the body is key when thinking about adjustments for neurodivergent individuals deeply resonated through the impact that stimming had on my artistic practice and my private life. It boosted my creativity, improved my mood, and made me generally more relaxed, which in turn made me a better partner, friend, and parent—all roles that I find challenging to combine with my artistic drive. I discovered that being my authentic self transforms the world around me and that embracing my neurodiversity is compatible with leading a successful artistic career. I therefore, propose that neurodivergent joy is not a pleasant luxury but a crucial component in understanding connection: “The minor gesture is everywhere, all the time....The minor invents new forms of existence, and with them, in them, we come to be” (Manning, 2016, p. 2).

Particularly true for neurodivergent individuals who are non-vocal, stimming is a way to engage deeply with their surroundings, in ways that neurotypicals might not understand at first, but that are crucial for their wellbeing and their engagement with a world that they share with everyone else:

> The way that I move is an ongoing response to what is around me. Ironically, the way that I move when responding to everything around me is being described as "being in a world of my own," whereas if I interact with a much more limited set of responses and only react to a much more limited part of my surroundings people claim that I am "opening up to true interaction with the world. (Baggs, 2007)

5.3. Year II—Artistic Research as a Tool to Rethink Accessibility

The result of the artistic exploration to draw my moving body, and later trying to draw the movements themselves (Figures 7 and 8), showed me how my body perfectly knew what it was doing, an experience I can't say my mind is equally proficient at. This was a surprising realisation as I was still new to re-learning and easing into my stimming gestures. I would film myself moving, then draw what I saw on the recordings, then try to implement what I drew into further stimming patterns, and so on. These loops of gestures that fed into each other helped me distil the essential qualities of the movements. I liked that this way of working somehow reflected the movements themselves as well—a truly neurodivergent research structure emerged. When I looked at the figures I traced, I came across recurring delicate circles, shy and prominent brush strokes, and, time and time again, lemniscates (a lying eight, symbol of infinity: ∞; see Figure 7). These patterns seemed like an underlying form language that I had not been able to see or read yet, a level of physical expression that lies beyond language and, therefore, holds the potential to understand self-regulation beyond a limiting medical vocabulary.

Figure 7. Tracing a stim in full movement.

The results of my artistic explorations so far shine a light on how neurodiversity is experienced on a personal level. Focussing on and practising stimming, as well as studying it through different media, leads to a more visceral understanding of it. Through this exploration, my understanding of stimming changed from a purely regulatory function to a natural expression of my body. Stimming expanded my comprehension of what it means to feel good in a neurodivergent bodymind. This includes the circumstances that facilitate stimming regarding space and time: spaces in which time can be experienced as more loopy than linear, in which bodies can discover their potential by being themselves, and in which stimming can flourish as a radical gesture of self-care.

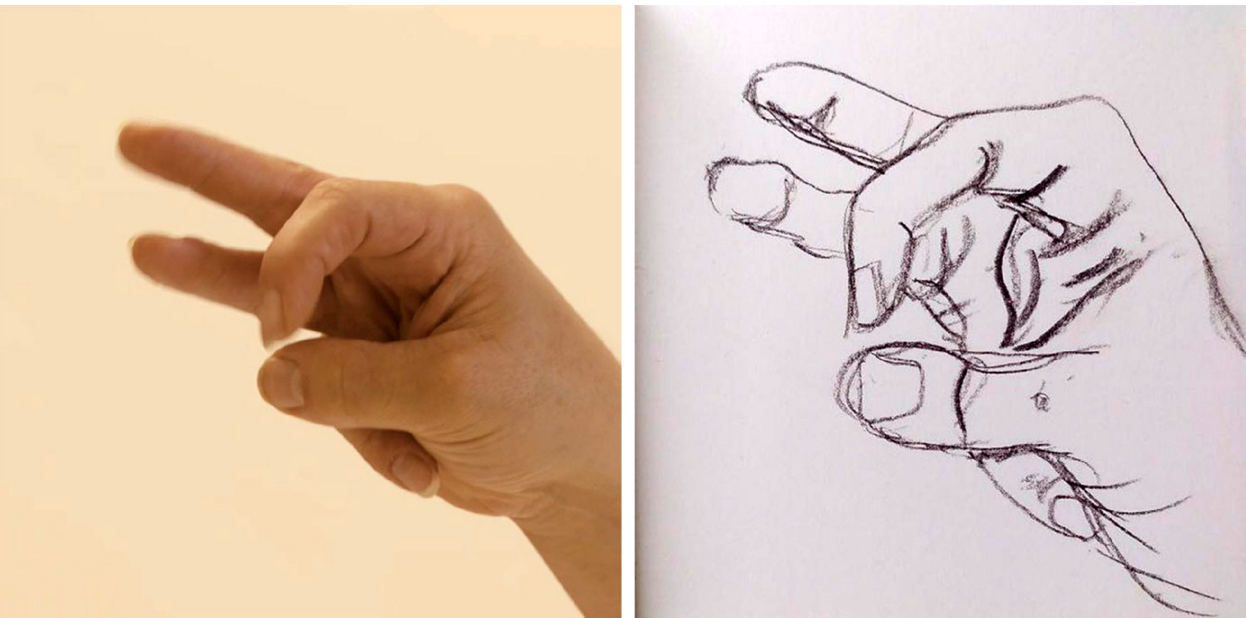

Figure 8. Sketch of video material.

While I dived into a non-verbal exploration of stimming for a more visceral understanding of its nature, I took detailed notes. They contain concrete observations that hold the potential to create new spaces by finding words for ephemeral processes. One example would be certain words that I noted during my stimming work and that became persistent in their presence as I referred to them repeatedly: being in the zone, pacing a space, looping, circular time, comforting, coming into myself, sanding the edges, tracing my presence.

All these, thrown onto the paper without much thought, hold pieces of my neurodivergent reality: how it feels to anchor my presence in space through moving, what happens inside me, in the periphery of my body, as well as outside of it when I stim. They trace how stimming affects my perception of time and space. These descriptions can help broaden the perspective of medical professionals who diagnose and treat neurodivergent individuals, especially women, as they can illustrate the degree to which we perceive the world differently, and how strongly we feel intertwined with it. Maybe these words can find their way into descriptions of neurodivergent needs that lay the foundation for the development of stim toys or stim rooms. My goal is not only to provide more information for neurodivergent women on how to thrive but also to support them in their self-advocacy in obtaining diagnoses and building strong careers. Language is important when it comes to understanding a phenomenon, and by naming observations, they come to be. How we label them determines our perspective and shapes them in our minds. In a neurodivergent cosmology, developing and sharing neurodivergent wording can lead to neurodivergent worlding. While this can create safe and empowering spaces for us neurodivergent individuals to thrive, I believe that crafting a frame in which radical acceptance holds space for each one of us transcends the world of neurodivergent creation. In Siobhan Davies' words:

> Stimming has become both my subject matter and my method of exploration. Shedding the shame I have associated with it in the past, I am now celebrating all that it is; mesmerising, stimulating, pleasurable, soothing, grounding, challenging and disruptive...shifting from a position of stigma to one of curiosity and acceptance. As such, I hope that I can serve to remind people of the universality of

> stimming and create an appreciation for shared experience, whilst also opening up a greater understanding and tolerance for difference. (Davies, 2020)

I would like to summarise this early stage of research with the following findings:

- As a neurodivergent individual, I benefitted greatly from the embodied knowledge that was generously shared by other neurodivergent people online in the form of support, empowering language, life hacks, and a general celebration of neurodivergent culture. This wealth of knowledge and support from the neurodivergent community, this sense of solidarity, would not have been accessible to me through classic medical trajectories, underlying my proposition that neurodivergent embodied knowledge needs to be taken into consideration in diagnosing and supporting neurodiversity, especially in women.
- Stimming is an essential self-regulation tool for neurodivergent individuals as it helps them handle their environment. As such, it should be better understood by institutions working on accessibility, as enabling and promoting it can hold space for neurodivergent individuals by making them feel seen, safe, and appreciated. In addition, designing spaces in which people can stim freely can benefit everyone as they potentially provide support for a larger demographic than just neurodivergent individuals.
- Artistic exploration of stimming can contribute to building safe spaces for neurodivergent individuals. Studying stimming through different media has shifted my initial goal of creating a work of art *about* stimming, oriented on the neurotypical gaze, to working towards one that is based on accommodating stimming, departing first and foremost from the needs of the neurodivergent bodymind. I discovered that my initial focus on celebrating stimming as a literal gesture of care slowly shifted towards a deepening understanding of stimming as a way to engage with and impact the space.
- My observations can enrich the current medical framework with a neurodivergent perspective through artistic output as well as language. This way, my research contributes to shifting the focus of potential adjustments from problem-solving to joyful designing. This approach puts the emic perspective first in developing concrete propositions such as "accessibility riders" (a list of accessibility tools that can be offered by an institution) developed to welcome neurodivergent artists (think quiet spaces, soundproof ear gear, relaxed deadlines). Accessibility tools for neurodivergent individuals should not be developed without neurodivergent expertise.

6. Further Research

During the third year, my personal experiences will be enriched through cooperation with other neurodivergent women artists. Together with them, I will work on a performance piece (a choreography or a score) that brings our embodied expertise together. Leaning into Manning's (2016, p. 111) concept of leading-following, I want to develop a choreography or score in which stimming plays a key role. It will be based on a cyclic development of mutual play and experimentation, continuously feeding into the next step. Simultaneous to our work on the dance floor, I plan to do interviews around their experiences navigating art education and their respective field(s), their obstacles, and which tools they employ or are missing, as well as their experiences in being othered and judged as not-belonging. Furthermore, through shared moments of common stimming, this emic research will implement several perspectives to keep this investigation representative of the variety of stims that exist. These moments of reflection, as well as the common stimming experience, will feed back into the piece I am creating (my artistic output) as well as the neurodivergent toolkit I will be developing as a hands-on output that can be used by other artists and institutions.

As more and more neurodivergent creatives use their approaches for research and accessibility (see Bakan, 2014; Thom, 2020) my contribution to the field expands the broader understanding of stimming, and my proposition to use stimming as an access tool can find implementation in the growing numbers of accessibility riders.

Simultaneously, the website Neuroverse will be developed and launched. It is meant to be a pool of information for neurodivergent individuals (as well as their allies) and institutions that want to work on their accessibility. Neuroverse is not only a research output that structures my findings in an accessible manner, but also a format that is supposed to empower individuals by sharing a neurodivergent vocabulary list and a collection of tools that can be continuously expanded. It will also host a visual library of stims showing the variety and beauty of different forms of stimming, and a neurodivergent accessibility rider that can easily be printed out for personal use. Finally, Neuroverse will have an ever-expanding list of resources on neurodiversity in general, women more specifically, and a special focus on neurodiversity in the arts (Figure 9). Through this easily accessible channel, I contribute to bridging the gap between the neurodivergent experience and professionals in the medical field.

Figure 9. First draft for Neuroverse.

Not only can neurodivergent individuals (and the ones wondering about their potential diagnoses) access important information, they can also enjoy seeing their lived experience portrayed in a respectful and empowering way. This platform will also help medical professionals like speech therapists, psychiatrists, and psychologists to better understand neurodiversity in women, as there are still too many misconceptions preventing individuals from getting adequate diagnoses and support.

Neuroverse will be developed with neurodivergent individuals in mind to support them and their friends, partners, family, and allies, as well as institutions that want to implement lasting and true change in their efforts to diversify their in- and output. Over time, I wish for it to become a hub of neurodivergent culture where people can post opportunities, exchange experiences, and keep expanding its resources, such as the neurodivergent lexicon or the list of life hacks.

7. Conclusion

As an artist, I constantly ask myself whether my perspective on any kind of phenomenon contributes to its understanding. When it comes to artistic research within academia, the question of the relevance of one's subjective approach becomes even more compelling—calling on the artist to be very attentive to the doubts that arise when presenting their perspective on something as purposefully objective as academic research. At the same time, I learned through my art practice that often the most precious encounters with others happen through opening our very own story.

Without leaning too much into aspects of vulnerability—that have their place—I would like to add my voice to the canon as my approach centres on listening to neurodivergent women's experiences because their voices are lacking while carrying so much knowledge. At the same time, I argue that embedding support structures that help neurodivergent women to thrive in the arts (such as quiet residencies or dyslexia-friendly application forms) are valuable and important tools for everybody and can strengthen social cohesion.

If we make space for everyone at the table, everyone feels included. One does not need a dyslexia diagnosis to benefit from the option to record an application for an art school on video—it might just generally give a feeling of acceptance and take away some stress. This simple measure might encourage someone's first try. Amplifying excluded voices matters. So much neurodivergent talent remains unseen because artists struggle with these obstacles.

Accessibility is beneficial for everyone. Let us make decisions with everyone on board—we are all relational beings. We all need to feel supported by our environment, the ones amongst us who struggle to formulate their needs and experience othering and exclusion, even more so. Implementing tools formulated by minorities can be a great way for institutions to promote solidarity and inclusion.

As Stimming a Space presents my perspective, it should not be read as a universal key to female neurodiversity. Neither should it be discarded as an isolated experience. Countless conversations have brought me in touch with shared feelings of confusion, longing, and deeply caring about the state of the world. The porosity that I mention is the reason why we are often at such a loss: in contrast to many a stereotype about neurodiversity as cutting individuals off from the world, it makes us so very intertwined with what is happening around us. We might respond to these stimuli differently, but we are in a deep and ever-ongoing relationship with the world, feeling and caring profoundly. Stimming a Space broadens perspectives on neurodiversity by highlighting these lesser-known aspects of it. What this exploration has shown me so far is that even though all neurodivergent individuals are unique, stimming can connect us—not just as a commonality but as a literal gesture of connection.

This article is structured in its own rhythm on purpose, focusing on minor details before placing them into a larger context. It dances and flows just like my mind. It embodies my ambition as an artistic researcher to have a voice on platforms like these while keeping my neurodivergent mother tongue.

Being our neurodivergent selves is not a luxury but a condition if we genuinely want to hold space for one another. We must be able to get a seat at the table without denying who we are. To build spaces in which we can unapologetically be ourselves and use our own language to describe our reality in full agency, we

need institutions to understand our needs and accommodate them, to hold space for our buzzing minds and stimming bodies. If art schools, museums, and galleries really are to become inclusive and diverse, they must include all voices. They must include all languages, be it humming, be it movements.

How can we unite this dreamy, loopy, and circular neurodivergent cosmos with what you call the normal world and what, for us, is a place of misunderstanding and disconnection?

Listen to us.

Sit with us while we breathlessly share our newest discoveries, our encounters, our being puzzled about the state of the world, sharing facts that are close to our hearts—our love language.

Listen while we share our deep emotions.

Listen to us repeating words over and over because they feel good; listen to us humming.

Be silent with us.

Sit with our minds while they are circling slow and fast.

Breathe with us.

Watch us moving at the margins: our fingers ticking, our hips swaying, our hands dancing.

Let minor gestures grow.

Acknowledgments

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Conflict of Interests

The author declares no conflict of interest.

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ARTICLE

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Synderesis vs. Consequentialism and Utilitarianism in Workplace Bullying Prevention

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Abstract

The existence of workplace bullying in modern organizations is, first of all, a serious moral challenge. Since bullying characterized by intense and long-lasting persecution of the target causes serious negative consequences for organizations, there are proposals to base the prevention of this phenomenon on utilitarianism. However, some studies show that the ethics that judges the goodness of an action by consequences causes many problems at the level of interpersonal relationships. Therefore, in the context of workplace bullying, it is proposed to consider the scholastic idea of synderesis. The article theoretically examines three alternatives to bystanders' decisions based on the ideas of consequentialism, utilitarianism, and synderesis: to act constructively actively (to support the victim), to act destructively actively (to support the persecutor), and to act destructively passively (not to intervene in the conflict). Considering that different schools of consequentialism and utilitarianism cannot guarantee constructive behaviour of bystanders, the decisions inspired by the conscience guided by synderesis can be a suitable alternative that can be easily implemented in practice.

Keywords

consequentialism; ethics; synderesis; utilitarianism; workplace bullying

1. Introduction

Because utilitarianism promises the "greatest good for the greatest number," it may be a poor choice for preventing workplace bullying. Such assumption sounds paradoxical and contradicts the opinion that utilitarian ethics is one of the means that can protect organizations from workplace bullying (Akella, 2020;

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Harvey et al., 2009). According to Zedlacher and Salin (2021), workplace bullying “consists of repeated, long-term exposure to a variety of negative behaviors.” It often involves more than one person, and persecution causes severe psychological, physical, and professional consequences for the target (Leymann, 1996; Paull et al., 2012; Zedlacher & Salin, 2021). Since workplace bullying causes more harm than good, and it is believed that organizations are interested in avoiding it (LaVan & Martin, 2008), Dollard and Jain (2019) state that effective management of employee safety and health at work requires ethical leadership, inspired by utilitarian consequentialism, especially when this is related to the psychological health climate of employees.

Utilitarianism, as an idea that assesses consequences, is related to consequentialism. Consequentialism is a theory of morality stating that moral value or good is the production or promotion of best consequences and that it is morally right to behave in a way that promotes the maximum good (in the case of utilitarianism) or the best or greatest good (Guha, 2023). However, bystanders may rationalize their destructive actions so that they are considered morally acceptable (Ng et al., 2020). In addition, the defence of the target of workplace bullying means resistance to the group. This requires certain risk and sacrifice, and in this context, according to Everett and Kahane (2020), there are at least several ways in which utilitarianism deviates from the choice inspired by common sense morality. Therefore, according to the authors, more research is needed to better understand the decision-making process.

Several previous studies raise doubts about whether utilitarianism can encourage bystanders to act prosocially. Gokce (2015) has found that namely utilitarianism and Machiavellianism hindered employees from reporting violations performed by co-workers to their organization’s management. Meanwhile, research results of Zollo et al. (2017) showed that utilitarianism could promote Machiavellianism, which justifies any means to an end. In other words, although the organization may not be interested in the existence of workplace bullying, this logic does not necessarily apply at the level of interpersonal relationships. Moreover, according to Guha (2023), an important question arises as to whether consequentialist ethics requires the promotion of objective values, i.e., valuable consequences, rather than the ones determined by the mind or psychology of the moral actor(s). The answer to the question of how consequence-oriented ethics affects interpersonal relationships is very important for understanding and predicting the behaviour of bystanders of workplace bullying, since it is their prosocially active behaviour that can stop persecution and protect the target from negative consequences (Linstead, 2013; Paull et al., 2012, 2020).

Some studies, particularly in the field of bioethics, emphasize the role of conscience in moral decision-making (e.g., Hsiao, 2022; Lamb & Pesut, 2021). Therefore, in recent years, even in the works of non-theologians, increasingly more attention was paid to the scholastic conception of synderesis, which refers to an innate human ability to know the basic moral principles that allow the conscience to properly judge the morality of one or another action (das Neves & Melé, 2013; O’Shea, 2018; Zollo et al., 2017). In addition, research shows that moral decision-making is significantly influenced by emotions and intuition (Schnall & Cannon, 2012), while synderesis allows to correct mistakes made in this context (Zollo et al., 2017). Thus, it can be assumed that conscience directed to good by synderesis, which follows the Golden Rule of not doing anything bad to others, what a person would not want to receive himself (Kärkkäinen, 2012), can encourage bystanders’ moral decisions that are favourable to the target of workplace bullying. Although such perspective has not been explored, the mere possibility encourages rethinking of whether the synderesis principle could be an alternative to consequentialism and utilitarianism. Therefore, this study aims

to examine how consequentialism, utilitarianism, and the synderesis principle are capable of coping with the challenges posed by workplace bullying from the bystander's perspective.

This study raises three questions:

> Q1. What choices can be made by bystanders of workplace bullying from a consequentialist perspective?
>
> Q2. Can utilitarian ethics provide a sound basis for making moral decisions that are favourable to the target of workplace bullying?
>
> Q3. Can the synderesis-guided conscience be a reasonable perspective in the prevention of workplace bullying?

The article consists of several parts. First, the methodological parameters of the study are defined and, based on the literature examining the behaviour of bystanders of workplace bullying, three possible options for co-worker actions are distinguished. Further, the context of workplace bullying is described, which influences how co-workers will view the target. Options of bystander choices are discussed from three different perspectives of consequentialism and two viewpoints of utilitarianism. Finally, the conception of synderesis is presented, followed by the analysis of what way the latter perspective is significant while seeking to protect the target of workplace bullying from persecution.

2. Methods

This study employs a narrative review of scientific literature, following a critical paradigm. Snyder (2019) emphasizes that in order to generalize or evaluate a broad area of research, a rigorous systematic review approach is not possible, and instead, a semi-systematic (narrative) approach is more appropriate, intended for topics that have been differently conceptualized and examined by different groups of researchers in different disciplines. Unlike systematic reviews, this method distinguishes itself by providing interpretations, critiques and deeper understanding (Greenhalgh et al., 2018). Meanwhile, the critical paradigm requires presenting and juxtaposing different ideas before presenting one's idea so that the reader can get a clear picture (Saunders & Rojon, 2011).

The research consisted of several stages. In the first stage, publications and documents were searched in EBSCO, JSTOR, Oxford Journals Collection, ScienceDirect, SCOPUS, Web of Science databases, and the Google Scholar search engine. Various combinations of keywords ("workplace bullying," "bystander," "moral," "synderesis," "consequentialism," "utilitarianism") were used in the search. Preference was given to previously published articles and the ones cited by other authors. Then, research abstracts were read, and publications that did not correspond to the topic of this study were rejected. In the second stage, selected studies were read and the essential principles of different moral approaches were distinguished using the method of structural literature analysis. In the third stage, these principles were applied in solving three alternatives of moral choices of workplace bullying participants.

Bystanders in this study are understood as co-workers who choose one or another role with regard to the target and the persecutor. They do not directly participate in the persecution as a target or persecutor, but

through their behaviour, they can influence the process itself (Ng et al., 2020). In the bystanders' behaviour model proposed by Paull et al. (2012), roles are distributed in a continuum between constructive (actions benefit the target) and destructive (actions benefit the persecutor) ones. Constructive and destructive behaviour is further divided into active (concrete support for one or the other side) and passive behaviour. Passivity manifests itself by the inability to provide support to the target or by ignoring and avoiding the situation. Since in this study we do not aim to detail the subtypes of behaviour and maintain that a strong moral identity helps to resist harmful behaviour (Mitchell et al., 2015), we have summarized the choices of bystanders into three options: (a) to behave constructively actively (to support the target), (b) to behave destructively actively (to support the persecutor), and (c) to behave passively (to stay out of the conflict). Similarly, the bystander's behaviour is also conceptualised by Fahie and Dunne (2021), who distinguish three possible responses to persecution: inertia (doing nothing), intervention (direct intervening to help the target), and involvement (participating in persecution).

It should be noted that in this study, the terms "constructive" and "destructive" are used depending on how they are of service to the target of workplace bullying; that is, either help is provided to the target or persecutors are supported.

3. Results

3.1. The Target in the Context of Workplace Bullying

Before discussing the possible choices of bystanders, it is necessary to assess the complicated situation in which the co-workers find themselves. Several features of the phenomenon, due to which the personality of the target of workplace bullying can be assessed ambiguously, can be distinguished.

After summarizing the definitions offered by different authors, Chirilă and Constantin (2013, p. 1178) described workplace bullying as a situation in which "one or more individuals encountered in a repetitive manner a number of negative acts from the part of one or more of their coworkers, supervisors or subordinates, [a] situation which makes the person defenceless." Other authors emphasize that it is a prolonged process characterized by a pre-conflict phase that develops into a conflict, stigmatization of the target, involvement of management, and removal of the target from the organization (Keashly & Nowell, 2020; Leymann, 1996; Shallcross et al., 2013).

Leymann (1996) associates stigmatization of the target with aggressive manipulation, when the target is presented to others as someone who needs to be punished. In addition, workplace bullying often occurs because of external causes that cause tension. When there is strong tension in the work group, the target becomes a scapegoat who is a good "lightning conductor" (Zapf, 1999, p. 83).

Explaining why co-workers unite against the target of workplace bullying, Faldetta and Gervasi (2024) ground on René Girard's scapegoating framework. According to them, to overcome stability-threatening mutual violence (which occurs during the conflict), co-workers unite against one target that cannot respond with the same violence. In this context, Reknes et al. (2021) pointed out that anxiety characteristic to the target could be interpreted as weakness (an easy target). In addition, targets often distinguish themselves by provocative, irritating qualities due to which they receive hostility.

Although the “technical” definition of workplace bullying typically includes situations where the bully may be a single person or several individuals, in practice bullying occurs in the context of the group whose members act either actively or passively (Leymann, 1996; Zapf, 1999). In this context, group dynamics and bystanders’ behaviour have a significant impact on the course of the process and the consequences experienced by the target. Cason et al. (2020) emphasise that bystanders often do not intervene due to a lack of moral courage or fear of social consequences, which creates an atmosphere of silence and implicit approval (Rosander & Nielsen, 2023). Such passivity can signal to the bully that his/her behaviour is acceptable and unquestionable, which allows for the manifestation of open aggression. According to Kim (2020), when bystanders do not break the power imbalance between the bully and the victim, bullying can become a normal part of the work culture, leading to an escalation of bullying.

Social factors also influence bystanders’ behaviour. Gotdiner (2023) points out that bystanders often evaluate their social relationships and the potential consequences of intervention; therefore, they may be reluctant to act for fear of social isolation. Such fear strengthens the bully’s confidence and aggravates the victim’s situation. Furthermore, the passive stance of bystanders can promote the phenomenon of “bystander apathy,” where due to diffusion of responsibility people feel less inclined to intervene (Mazzone et al., 2021). This creates a vicious cycle in which the bully gains more power and the victim becomes increasingly isolated and unsupported.

Thus, despite the fact that researchers have well described the workplace bullying process itself, it is not easy to understand what is really happening in a specific situation. Yamada et al. (2018), who reviewed four decades of research on the phenomenon in the USA and Europe, noticed that the phenomenon of bullying was not so well known that it could be recognized even by the victim himself or by the professional to whom the victim turned to for help.

3.2. Bystander Decisions in the Perspective of Consequentialism

Many of us make everyday decisions using moral considerations (Quiambao, 2022), and although various moral theories seek the same goal of helping us make the best decision, actually, specific decisions differ depending on which moral theory is followed. Traditionally, consequentialism is based on a standard wording: (a) the action must be performed if and only if its outcome is better than the one of any alternative; (b) the action is right if and only if its result is at least as good as the one of any alternative; (c) the action is wrong if and only if it is not right (Moore, 1912, as cited in Carlson, 1999, p. 253). However, this moral theory is not homogeneous and has many varieties that do not agree with each other, from which several competing trends can be distinguished: actualism, possibilism, and probabilism. The attitude towards the moral duty in decision-making depends on the trend that the decision-maker represents.

According to Timmerman and Zakhem (2021), actualists believe that at any time, the most precise action under their control, which would lead to the best outcome, should be performed. For the actualist, actual consequences by which the morality of the action is measured are always important (Bench-Capon, 2020), while current and future actions are always relevant (extreme actualism; see Bykvist, 2002).

Jackson and Pargetter (1986) give the example of Jones driving through a tunnel behind a slow-moving truck. Although it is forbidden to overtake in the tunnel, he intends to change lanes (it may be that he does not know

about the ban and is in a great hurry). He can choose: If he changes lanes without speeding up, he will further disturb the traffic, or he can increase the speed and overtake. The third option is not to change lanes, increase speed, and hit the back of the truck. The best option for the actualist is to change lanes and increase speed. According to the authors:

> If you want the answer for some action as to whether an agent ought to do it, look at the set consisting of the action and what the agent would do instead; if you want the answer as to what an agent ought to do at or during some time, look at all the maximally relevantly specific actions possible at or during that time. (Jackson & Pargetter, 1986, p. 255)

The principle of assessing an action, considering its real consequences, can be applied to complex social scenarios, such as the bystander's behaviour in the case of workplace bullying. For example, let us look at the example below of an employee Maria, who has encountered a moral dilemma in her work environment. Maria notices that her manager constantly ridicules Tom in public, and most of her co-workers approve of this behaviour, because it ensures their status and favourable working conditions. Maria has several options: (a) to publicly intercede for Tom and incur the wrath of her manager and co-workers without changing Tom's situation; (b) to do nothing, this way creating conditions to continue harming Tom and, in such an atmosphere, to risk being harmed herself at some point; (c) to support the interests of the majority (the manager with co-workers) and ensure personal safety. If the action aimed at protecting others causes more negative consequences for the agent than the potential benefits to others, the actualist may believe that such action is not the best choice. Therefore, Maria should choose the action that would realistically produce the best outcome for all individuals involved in the workplace bullying situation, taking into account what she will actually do and what consequences of her actions will be.

In practice, where the target is being persecuted by the manager and his/her subordinates, the bystander's intervention may not change the situation and be disastrous for the moral agent himself/herself. A neutral attitude creates opportunities for persecutors to act and, as the climate worsens, poses a risk to the person who has chosen a neutral stance. Therefore, Maria has reason to think about joining the majority, because she must also evaluate the real consequences of her choice. Even if the decision does not seem ideal, actualism acknowledges that subjects have the right to evaluate their own wellbeing and choose actions that maintain a balance between moral ideals and personal interests. This also highlights the contradiction of actualism, because this perspective, which demands attention to the wellbeing of others, does not require individuals to disregard their own interests (Cholbi, 2020).

Proponents of possibilism follow the position that at any time, the agent must perform the action that is part of a series of best actions that he/she can perform in his/her lifetime (Timmerman & Zakhem, 2021). In this case, the best option for the aforementioned Jones is to do nothing and stay in the same lane, without increasing speed (Jackson & Pargetter, 1986).

The actualist standpoint, unlike the possibilist one, states that the agent's free actions in certain circumstances at least partially determine his/her moral obligations (Timmerman & Swenson, 2019), whereas extreme possibilism follows the approach that they never matter (Bykvist, 2002).

Meanwhile, based on the standpoint of probabilism, actions are assessed not according to actual consequences, but according to expected consequences, taking into account the probability of various

possible futures (Bench-Capon, 2020). That is, it is believed that to some extent, consequences can be calculated; therefore, the action is moral if there is a probability that the consequences will be positive. Since, to a greater or lesser extent, actualism and possibilism are based on intuition, Cohen and Timmerman (2024) maintain that probabilism is superior to these perspectives. Table 1 illustrates the possible perspectives of bystander decisions.

Table 1. Possible choices of bystanders concerning different trends of consequentialism.

Trend	Reaction to persecution	Choice	Consequences for the target
Actualism	Destructive	To contribute to persecution	Negative
Possibilism	Passive	To do nothing	Negative
Probabilism	Depends on a set of circumstances	All three options are possible	From positive to negative

As already mentioned, the terms “constructive” or “destructive” are used only from the perspective of the target of bullying. Thus, according to the actualist point of view, in the process of bullying, the best option for the bystander, like for Jones, is to join the persecutors who seek to remove the target annoying them. That is, the bystander may not care that the target may be harmed by such actions in the future because, among the existing choices, there are certain options of consequences (positive or negative) for the bystander himself. It is no coincidence that actualism is also criticized for being too tolerant of moral imperfection (Carlson, 1999) and dependent on the person’s egoism (Bykvist, 2002).

For the possibilist, doing nothing may be a morally appropriate choice. Considering the complexity of the situation, if the possibilist decides to withdraw now, he/she may decide not to withdraw in the future; that is why current withdrawal is an acceptable option of action. Finally, the probabilist would try to calculate all probable alternative variants, taking into account many variables (e.g., how the behaviour of the target, the persecutor, and that of other employees will change during the process, what new information may be revealed about the conflict, what attitude of the organization’s management will be, whether third parties will not intervene in the conflict, etc.), and only then make a decision. Considering the complexity of workplace bullying and the manipulative behaviour of the persecutor, it is difficult to expect a quick decision that is favourable for the target.

Since it is not possible to accurately predict all consequences of an action, Lenman (2000) calls this circumstance a very deep epistemic argument for the critique of consequentialism. There are many unpredictable and most often uncontrollable variables that can determine the final outcome (e.g., it may be contrary to the intentions of the decision-maker). Therefore, Bench-Capon (2020) does not rule out that consequentialism may serve the purpose only in very strictly defined situations; for example, when two persons are playing chess. In real life, with many unpredictable variables, it is impossible to guarantee such simple conditions. Finally, the decision maker may not have sufficient knowledge, which is of great ethical significance in decision-making (Brundage, 2014).

3.3. Bystander Decisions in the Perspective of Utilitarianism

As already mentioned, utilitarianism is a form of consequentialism, since representatives of this moral perspective focus on the consequences of decisions (Guha, 2023; Quiambao, 2022; Tseng & Wang, 2021).

Although there are different varieties of utilitarianism, the main principle is based on the pursuit of maximizing the utility of the decision and prioritizing the happiness of society (Tseng & Wang, 2021); therefore, harm made to individual people is justified if this leads to the welfare of the majority (Conway & Gawronski, 2013; Tseng & Wang, 2021).

Different versions of utilitarianism offer different explanations for when the decision made is right. Two of them can be distinguished: act utilitarianism and rule utilitarianism. At the same time, they also indicate different decision-making strategies.

Act utilitarianism is based on the idea that "an act is right if and only if it results in at least as much overall well-being as any act the agent could have performed" (Eggleston & Miller, 2014, p. 126). Thus, a supporter of this school decides on a case-by-case basis how much his/her action will or will not contribute to the common welfare. In this case, it is namely welfare that is morally significant (since good is a moral category), but not the individual, who is only a receptacle of welfare and may suffer (Eggleston, 2020, p. 10).

Rule utilitarianism introduces a certain regulator—rules accepted by consensus: "an act is right if and only if it would be permitted by a system of rules whose general acceptance would result in at least as much overall well-being as would the general acceptance of any system of rules" (Eggleston & Miller, 2014, p. 131). According to Mack (2004), this school requires two things. First, a moral rule is established, the acceptance of which would maximise the expected social benefits in similar situations. Next, a morally right action is defined that is consistent with the established moral rule.

Although both schools focus on maximum benefit of a decision, there may be contradictions already within the framework of the utilitarian theory. When comparing these two schools, Savulescu et al. (2020) point out a problem arising from the difference in approaches. According to them, act utilitarianism may predict better consequences or not in determining negative consequences, but the accepted rule (rule utilitarianism) may prohibit such action.

Thus, both versions of utilitarianism agree that the most important value is the welfare of the majority, and this is the most important factor that determines the perspective of the survival of the target of workplace bullying in the organization (Table 2).

Table 2. Bystander choices in the perspective of utilitarian ethics.

Version	Strategy	Reaction to persecution	Choice	Consequence for the target
Act	Personal assessment	Destructive	To support persecutors	Negative
Rule	Collective agreement	Destructive or constructive	To support persecutors or the target	Depends on the majority's decision

In the perspective of act utilitarianism, the bystander has little freedom of choice, since the majority's welfare outweighs the welfare of the target. The bystander, guided by personal judgment, may decide to approve the persecution of the target or even to actively participate if he/she believes that this will contribute to the group's stability or wellbeing. This way, the target may be sacrificed for the sake of organisational harmony, since utilitarianism does not promote consideration of the victim's intrinsic value and the right to be protected from harm. This happens because this ethical model, oriented to the common good, can ignore the protection

of individual rights, dehumanise the victim, who is perceived as a "problem," and justify harmful actions when they are perceived as contributing to the wellbeing of the majority. For this reason, the victim becomes an instrument, and the victim's dignity and rights lose meaning, which, according to theories of moral psychology and violence, can lead not only to the disregard of moral duties but also to the justification of violence as an "instrumental necessity" (Bufacchi & Gilson, 2016). In addition to the fact that the approach to persons as instruments dehumanises them and diminishes their dignity, in the context of the organisation, the "common good" is inseparable from the organisation's economic and stability and sustainability goals. Therefore, real decisions that would ensure all employees' happiness are usually difficult to implement in practice, because the organisation's wellbeing and the individual's happiness do not always coincide. Thus, even if attempts are made to take into account the interests of the target (e.g., to work safely at one's workplace, to feel co-workers' support and job satisfaction), this does not protect against various compromises that are unfavourable to the target, because the priority is always the welfare of the majority, which is the focus when making decisions.

In general, danger of utilitarian decisions stems from the perceived distance to the potential victim of violence. According to Dinić et al. (2021), individuals are more likely to make utilitarian moral decisions when they lack personal involvement or acquaintance with the victim (Dinić et al., 2021). Such disassociation may determine a reduced empathic response, which is why decision-makers may rationalise actions that may harm the victim if such actions are assessed as beneficial to the larger group. Lower empathic concern for victims can facilitate utilitarian decisions, reflecting a lack of awareness of the consequences of such decisions for individual lives (Takamatsu, 2018).

At first sight, rule utilitarianism should benefit the target but leaves a lot of uncertainty. That is, the choice depends on the rules of what is considered permissible or impermissible behaviour. If the organization has not institutionalized workplace bullying, the rules are set by the employees themselves. On the other hand, institutionalization of workplace bullying encounters a serious problem. For example, the person's dignity may be enshrined in legislation, but the presence of different stakeholders and their interests may become an obstacle to the stable definition (Liefooghe & Davey, 2010).

It is significant that decision-making is not an impartial calculation of arguments, since there are many influencing psychological factors that determine who will be sacrificed. First, the decision to become a defender of the target of workplace bullying requires certain sacrifice. That is, if you resist the group, you have to accept the negative consequences for yourself. Moreover, the choice is between the "happiness" of the group and the welfare of one person whom that group treats as an obstacle to its "happiness." It is namely the pursuit of the greater good—in the utilitarian perspective—that allows people to be used, harmed, or even killed (Everett & Kahane, 2020). Thus, from a utilitarian standpoint, it is difficult to find arguments as to why the welfare of the target of bullying should be placed above the group's welfare.

Authors examining people's decisions in the context of violence draw attention to several other factors showing that the utilitarian moral theory does not always protect the target and can even encourage crimes. For example, research conducted by Harrison (2015) and Dinić et al. (2021) shows that situations in which the target is depersonalized make it easier to make moral decisions that are not beneficial for the target. In addition, there is a significant correlation between dark triad traits (narcissism, Machiavellianism, psychopathy) and utilitarian decisions, while a tendency towards sadism allows one to predict that the target will be sacrificed in the name of the common social welfare (Dinić et al., 2021, pp. 54–55).

Cikara et al. (2010) have found that participants in the experiment tended to sacrifice people whom they found less likable. In addition, the meta-analysis of Balliet et al. (2014) shows the influence of such important factors as belonging to the group, favouritism towards one's group members. According to the authors, individuals "strive for a reputation as a cooperator, thus securing future indirect benefits and reducing the probability of being excluded from the group" (Balliet et al., 2014, p. 18). Because workplace bullying is a group process in which a negative image of the target is actively created (for more details see Leymann, 1996; Pheko, 2018), persecutors present the target namely in such a perspective, which would justify the decision to "sacrifice" it. This is supported by several other studies that show how decision rationalisation mechanisms used by bystanders justify decisions that are unfavourable to the target of workplace bullying (for more see Zedlacher & Salin, 2021; Zedlacher & Snowden, 2023).

3.4. Bystander Decisions in the Perspective of Conscience Guided by Synderesis

As already mentioned, utilitarian ethics leaves gaps, due to which the target of workplace bullying may not receive adequate support from bystanders. Moral decisions are not only the result of moral reasoning but also intuition, since decisions are not always reasoned (Cushman et al., 2006; Zollo et al., 2017). Hence, both reasoning and intuition do not protect against errors; therefore, a reliable principle is needed to help avoid them. Can this principle be conscience?

Conscience is called a moral compass because its essential function is to determine what is true and good so that these can be pursued and mistakes can be rejected (Hsiao, 2022). However, conscience can also be wrong, which is why studies examining moral decisions based on personal conscience and searching for universal basic moral principles pay attention to the phenomenon of synderesis (das Neves & Melé, 2013; Lamb & Pesut, 2021; Zollo et al., 2017).

According to the philosophy of Thomas Aquinas, synderesis is the innate and indestructible capacity of the practical mind to envisage the fundamental principles of natural law (Crowe, 1956; das Neves & Melé, 2013; González-Ginocchio, 2017; Hogan, 2006; Zollo et al., 2017). Synderesis is described as a universal, innate habit that is independent of the person's cultural background to seek good and reject evil (das Neves & Melé, 2013; Hogan, 2006). Since synderesis constantly directs a person towards good, it leads to universal moral principles (Melé & Fontrodona, 2017), which boil down to the basic moral rule, also called the Golden Rule: "Do not do to others what you do not want to be done to you" (das Neves & Melé, 2013, p. 770; Kärkkäinen, 2012, p. 895). Although this rule is usually formulated as a prohibition ("do not do"), the Bible encourages positive activeness: "Whatever you desire for men to do to you, you shall also do to them; for this is the law and the prophets" (Matthew, 7:12). That is, not only not to do harm but also to make such decision which the person would like to receive from another person in a similar situation. This principle is also referred to as the ethic of reciprocity, when another person is perceived and acknowledged as "the other me," who essentially has the same rights and requirements (Fuchs, 2019).

According to Korsgaard (1996), "in Thomas Aquinas's account, which became standard, synderesis grasps the basic moral principles which are the first premises of practical reasoning, while conscientia is the conclusion, the act of judging that one ought to perform a particular action." In this context, the decision based on conscience is not emotional or intuitive. According to Sulmasy (2008), the principle of synderesis contradicts to the intuition-based approach to conscience, and conscience itself means a commitment to morality, an

obligation to choose moral decisions and an assessment of whether the action the person has taken or is considering would violate this commitment. Synderesis, as a permanent non-acquired habit (habitus naturalis) influencing that act of conscience, is the principle of the act of conscience (Stępień, 2014, p. 378).

Thus, what choice or choices does the bystander have when responding to persecution of the target of bullying? The choice is determined by the answer that is formulated based on the Golden Rule derived from synderesis (Table 3).

Table 3. Decisions based on the Golden Rule.

Choices	Question	Answer	Consequence for the target
To support persecutors	If I were in the co-worker's shoes, would I like others to help hurt me?	Negative	Positive
To do nothing	If I were being bullied, would I want the other person(s) to withdraw and not help me?	Negative	Positive
To defend the target	If I were being bullied, would I want someone to defend me?	Positive	Positive

Unlike in the utilitarian perspective, when considering what is "good," the focus is not on the consequences that would be determined by one or another decision, but on how much the very decision maker would like to receive such a decision in a similar situation. Even if the target of workplace bullying seems unpleasant, annoying, the Golden Rule serves as a test that in every case checks whether the action can be referred to as good. That is, if in an analogous situation, the decision would be unacceptable to "me," it cannot be acceptable to another person too.

Although the use of the innate human ability to distinguish good from evil can help put an end to the persecution of the target of workplace bullying, in practice, people are free to act contrary to the dictate of synderesis (Ahdar, 2018). Fuchs (2019) also draws attention to the risks arising from the person's inclination to feel empathy, first of all, for the members of his/her group. This can be also used by criminals who dehumanize their victims and dehumanize themselves.

4. Conclusion

In the process of workplace bullying, bystanders are involved in the crowd's "trial" where execution of the "punishment" is carried out "here and now." The decisions made by bystanders in such a tense situation for the persecuted person are like deciding the question of his/her life or death. Since, until now, workplace bullying has been examined from the organizational perspective, where utilitarianism seems to be the justifiable ethics, this article emphasizes the perspective of the target of bullying. That is, what decisions about the target can be made by bystanders, following the ideas of three schools of consequentialism, two schools of utilitarianism, and a scholastic idea of synderesis-guided conscience?

Consequentialism seems quite contradictory and, taking into account the ideas of its different trends, the manipulative nature of workplace bullying allows different solutions to the same situation. In any case, the consequentialist approach does not provide reliable guarantees that the defamed employee will receive

co-workers' support. From the target's standpoint, both supporting the persecutors and passive behaviour are destructive choices.

The specificity of moral acts depends on whether they are freely chosen and require certain moral awareness and understanding (Lamb & Pesut, 2021). However, this study demonstrates that consequence-focused utilitarianism seems to limit freedom of choice by insisting on calculating the collective benefits received by co-workers regardless of the act or rule version of utilitarianism. Of course, utilitarian ethics can explain why workplace bullying is harmful at the organizational level (even if we reject that in some cases the "sacrifice" of the target of bullying, who causes confusion, may seem beneficial to managers). However, this does not guarantee that every employee in all cases can feel safe and protected from being dealt with. This ethics becomes even more complicated in the group that cares about its own welfare, sets its own rules, and operates at the individual level affected by egoism. Of course, this review of research reveals only a few factors that emerge in the utilitarian decision-making process. However, they are important and cannot be ignored when considering how these ethics may affect bystanders' decisions. Especially bearing in mind the specificity of the bullying phenomenon itself, which can mislead moral decision-makers and encourage them to sacrifice the target for the greater social benefit of the group.

Synderesis allows one to discover universal moral principles on the basis of which conscience can distinguish between good and bad decisions. The Golden Rule, or the principle of reciprocity, serves as a test for deciding on a case-by-case basis what solution is fair and moral with regard to the target of workplace bullying. The decision to remain a passive bystander or to join the persecutors and "sacrifice" the target of workplace bullying for the "greater good" can be treated as "right" from a utilitarian ethics standpoint, but at the same time, can be against conscience. As Hsiao (2022) observes, the value of conscience does not depend on benefits or risks, but is related to the fact that it is an essential part of the human personality. Therefore, if the right to make responsible decisions is taken away, the person is deprived of what makes him unique—his rationality. Conscience guided by synderesis does not require complicated moral considerations and calculation of consequences and can therefore be easily applied in practice.

4.1. Implications

The results of this study may be useful for organisations seeking to develop workplace bullying prevention that takes into account the role of bystanders' moral attitudes. First, employee training should highlight the moral aspects of workplace bullying and the decisions of persons observing this process. It is easier to explain to employees what conscience-based decisions are than to suggest that they should apply complex ethical frameworks in practice. Emphasising the Golden Rule that encourages both avoiding destructive actions but also to actively helping colleagues who are being persecuted, training could include a situational analysis. This would allow employees to discuss the different roles of participants in workplace bullying from an ethical aspect.

Second, training must highlight why decisions oriented solely to the group's wellbeing may jeopardise the rights and dignity of certain employees. Such insights would help employees perceive how decisions based solely on final consequences can contribute to destructive behaviour or encourage bystanders' inaction.

Finally, psychological and social factors that influence bystanders' decisions must be taken into account. Research shows that building moral courage and reducing risk perception can promote employees'

determination to act constructively (Cason et al., 2020). Therefore, management should demonstrate zero tolerance for workplace bullying and actively support prosocial behaviour of employees. Incorporating practical exercises and group discussions into training can promote empathy and collaboration.

However, it is important to consider that ethical attitudes and value beliefs change slowly. For this reason, training should be continuous and long-term in order to ensure that newly acquired knowledge and behavioural patterns are established in practice. Training programmes should be periodically updated and supplemented with real-life examples and discussions. This would enable employees to consistently improve their moral thinking and behavioural attitudes. Organisations should also plan continuous activities, such as mentoring and support groups, which would help employees gradually integrate ethical knowledge into daily practice.

4.2. Limitations

This study has certain limitations, which are related to the fact that considerations are only partly based on empirical evidence. Therefore, in the future, empirical studies, for example, using an experimental approach, would be useful. In addition, the scope of the article did not allow us to review many other versions of consequentialism as well as principles developing conscience that is capable of distinguishing good from evil. However, this study is important in that it raises important questions as to what extent utilitarian ethics actually protects individual persons from workplace bullying in organizations. Moreover, it also lays a foundation for a new trend of research into the conscience-driven moral decisions of bystanders of workplace bullying.

Thus, although the theoretical analysis provides valuable insights, it would make sense to consider other moral paradigms in the future too. In addition, further research in different cultural contexts should be conducted and personal qualities should be evaluated (for example, analysing how perceptions of and reactions to workplace bullying vary depending on cultural norms, bystanders' moral maturity, empathy, or self-control). All this would create a broader perspective and a possibility to more deeply analyse bystanders' behaviour and moral decision-making processes in the workplace, having confronted with bullying situations.

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ARTICLE

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“Things Fall Apart?” Prospects of Solidarity in a Precarious World

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Abstract

In this article, we examine the potential of solidarity to address global challenges in an increasingly precarious world. Solidarity involves individuals or groups supporting causes—whether ideas, people, or contexts—to combat marginalisation and injustice, even as such efforts frequently encounter resistance. This prompts the critical questions: What motivates solidarity, how is it expressed, and how effective is it in resolving the issues it seeks to address? Drawing on illustrative examples from a variety of social movements worldwide, we analyse the diverse forms of solidarity and the tensions that arise when dissent and resistance intersect with collective action. Despite these challenges, we argue that solidarity remains a viable framework for addressing some of today’s most pressing and complex issues. By exploring both the opportunities and obstacles it presents, we highlight solidarity’s enduring relevance and transformative potential in fostering meaningful change.

Keywords

demonstrations; precarity; solidarity; strikes

1. Introduction

In this article, we examine the enduring relevance and transformative potential of solidarity in addressing global challenges within an increasingly precarious and polarised world (Herzog, 2018; Mishra & Rath, 2020; Vandevelde, 2024; Varma & Shaban, 2024; Wilde, 2007; Yuen & Tong, 2021). Solidarity, which we define as collective action to combat marginalisation and injustice, operates in complex and contested spaces where it often intersects with resistance and dissent. We aim to advance the discourse by demonstrating how solidarity can bridge divisions and foster meaningful change.

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We build on Émile Durkheim's foundational theories of mechanical and organic solidarity to analyse the dynamics of modern solidarity movements (Durkheim, 1933; Mishra & Rath, 2020; Schiermer, 2014; Thijssen, 2012; Thompson, 2012). Durkheim's (1933) distinction between solidarity rooted in shared values and identities, and solidarity based on interdependence within complex systems, frames our exploration of how solidarity functions in contemporary contexts. By applying this theoretical lens, we examine both its capacity to unite communities and its potential to deepen existing divisions.

Our analysis draws on illustrative examples from a variety of social movements worldwide. Grassroots movements and protests often reflect mechanical solidarity, where shared grievances or identities create a collective front. In contrast, challenges like climate change and economic inequality demand organic solidarity, which relies on networks of cooperation among diverse groups who support that cause. By investigating these manifestations, we highlight the adaptability of solidarity as a tool for addressing a wide range of pressing issues.

We make three key contributions to the study of solidarity. First, we integrate the concept of digital solidarity, examining how online activism enables virtual communities to mobilise around shared goals, expanding opportunities for collective action while also highlighting challenges such as polarisation within echo chambers. Second, we critically explore the interplay between solidarity and polarisation, analysing how solidarity can both bridge divides and intensify tensions in areas like migration, populism, and environmental activism. We identify conditions under which solidarity can counteract polarisation and foster inclusivity. Finally, we offer practical insights for policy and practice, emphasising inclusive approaches that integrate diverse perspectives to address challenges such as climate change, racial inequality, indigenous rights, and economic justice. By addressing these dimensions, we advance both theoretical understanding and practical applications of solidarity in a polarised and interconnected world.

Through this article, we situate solidarity within the context of contemporary global challenges, bridging historical and contemporary perspectives. We argue that solidarity is not only a mechanism for collective action and social cohesion but also a critical framework for addressing complex issues in a fractured world. By examining its contested nature and diverse forms, we lay the foundation for future research and practical applications to foster unity and resilience in uncertain times.

In the remainder of this article, we outline the theoretical framework that underpins our analysis, drawing on Émile Durkheim's theories of mechanical and organic solidarity to ground our discussion. We then detail our methodological approach, highlighting how we synthesise historical and contemporary scholarship to explore solidarity in its various manifestations. Next, we review the literature on solidarity, examining its contested nature and the ways diverse actors leverage it to advance their causes. This discussion is followed by an analysis of contemporary expressions of solidarity, from grassroots movements to digital activism, with a focus on their strategies and implications. Finally, we conclude by revisiting our central argument, discussing how our findings contribute to the existing literature, and offering practical insights for fostering solidarity to address today's pressing challenges. Through this structure, we aim to provide a comprehensive understanding of solidarity's potential in a polarised world.

2. Theoretical Framework

We employ Émile Durkheim's theory of solidarity to underpin our article. Durkheim, a French sociologist, is widely regarded as a foundational figure in the discipline of sociology. His primary focus was on the functioning of societal institutions during a period characterised by significant transformations in continental Europe, including urbanisation, industrialisation, and shifts in labour dynamics, with spillovers to other parts of the world (Durkheim, 1933, 1951). These changes resulted in interactions among individuals that extended beyond the confines of family and clan, necessitating innovative mechanisms to bind society together and support people who were impacted or exploited by these changes (Vandevelde, 2024). Durkheim observed that an improper and unregulated division of labour, which may engender conflict between labour and capital, could result in anomie. This state of anomie may precipitate numerous issues that adversely affect those who provide the labour. A salient example he identified was the increase in suicide rates among workers (Durkheim, 1951). This informed his development of the theories of mechanical and organic solidarities, which elucidate the various forms of cohesion that bind societies together. Solidarity, as a mechanism through which humans are interconnected, is thus regarded as one of Durkheim's significant contributions to academia. Many scholars, across sociology as well as other disciplines, have expanded upon his theory of solidarity, applying it to their own research in various contexts (Hawkins, 1979; Herzog, 2018; Mishra & Rath, 2020; Schiermer, 2014; Thijssen, 2012; Thompson, 2012). It is upon this foundation that we examine how contemporary societies and groups may apply his theories of solidarity to foster cohesiveness as a means of mending a fracturing world. By drawing on Durkheim's framework, we underscore the continued relevance of his theory to contemporary global issues.

According to Durkheim (1933), mechanical solidarity arises in traditional, homogeneous societies where individuals share similar work, values, lifestyles, and individual rights not different from those of their group. This form of solidarity is rooted in the collective conscience, binding individuals through shared beliefs and practices, and it is possible to the degree to which individual personality can be integrated into group personality (Durkheim, 1933; Thompson, 2012). The greater the extent to which a given society is homogenous, the greater the strength of its solidarity (Durkheim, 1933). Conversely, organic solidarity develops in complex, heterogeneous societies characterised by a high division of labour, where solidarity is based on the interdependence of individuals performing specialised roles, fostering cohesion through mutual reliance on each other's skills and contributions (Durkheim, 1933). This form of solidarity makes society more capable of collective action and allows individual freedom and autonomy (Herzog, 2018; Schiermer, 2014; Thijssen, 2012). However, Durkheim suggested that as societies gravitated increasingly towards organic solidarity, "collective representation progressively [became] less well defined" (Durkheim, 1972, p. 49). This seems to have alluded to the consequences of today's societal polarisation, as group representation is crucial in determining the collective good, and there are many competing interests among different groups.

Contemporary manifestations of solidarity reflect both forms, sometimes in a complementary manner. Mechanical solidarity is evident in grassroots movements and protests, where individuals unite based on shared grievances or common identities, such as racial, gender, or indigenous rights. These movements are not just about shared grievances but about the power of collective action. They draw on a collective sense of injustice, aiming to create a unified front against perceived oppressors or systemic inequities. In contrast, organic solidarity is more apparent in the sophisticated strategies required to address global issues such as climate change, economic inequality, and political instability. Here, solidarity involves networks of

cooperation among diverse groups with specialized knowledge and skills. For instance, online activism leverages technological expertise, academic circles contribute through research and advocacy, and labour unions mobilise workers for collective bargaining and strikes. Having said this, some of the issues highlighted can also cut across both mechanical and organic solidarity.

The interplay between mechanical and organic solidarity highlights the complex nature of contemporary solidarity practices. Grassroots movements and protests rely on the emotional and moral cohesion typical of mechanical solidarity, while broader, systemic challenges necessitate the functional interdependence characteristic of organic solidarity. This duality underscores the need for solidarity to be both inclusive and strategic, fostering unity while embracing diversity and specialisation to tackle complex global problems effectively (Adair, 2008; Mishra & Rath, 2020).

Durkheim's framework provides a critical lens through which we can understand the dynamics of modern solidarity. It elucidates how traditional forms of unity based on common identities coexist and complement the more complex, interdependent forms of cooperation required in today's globalised social landscape. Integrating both types of solidarity can help develop robust strategies to address contemporary societal challenges (Hawkins, 1979; Wilde, 2007).

3. Methodological Approach

Methodologically, this article is conceptual in nature, drawing on scholarly works that examine solidarity and its potential to foster inclusivity in an increasingly polarised world. The question of what constitutes a conceptual article has been raised by many and thus warrants us to shed light on it and why we have adopted such an approach for our article. In highlighting the relevance of what constitutes a conceptual article, we draw insights from the works of Whetten (1989), Cropanzano (2009), and Gilson and Goldberg (2015). Whetten asserted that seven critical questions needed to be answered when evaluating a conceptual article. These include: (a) what's new? (b) so what? (c) why so? (d) well done? (e) done well? (f) why now? and (g) who cares? (Whetten, 1989, p. 494). For Cropanzano (2009, p. 1306), the most important question to be answered when evaluating a conceptual article is when such articles "underscore commonalities that build coherence."

In evaluating our article, we assert that it meets the established criteria discussed by Whetten above. Notably, it underscores the resurgence of issues or new issues such as racism, migration, the Gaza war, etc., that necessitate solidarity, which is consequently significant for questions (b) and (c). Concerning questions (d) and (e), we argue that historical examples demonstrate how transnational solidarity has been employed to overthrow apartheid in South Africa, although some lingering consequences of these exist until now. For questions (f) and (g), these are relevant as global outrage and participation in these matters through various forms of solidarity strategies, as discussed later in this article, provide illustrative examples. In response to Cropanzano's call, we emphasise that the diverse strategies of solidarity can operate in a complementary manner, as they collectively address issues of injustice, oppression, and inequality, thereby creating coherence through their shared characteristics and impact.

To achieve the above, we engage with existing scholarship on social movements, including those leveraging digital platforms (Achmad, 2022; Peng et al., 2018; Russo, 2024; Stalder, 2013). The analysis involves

extracting key themes from academic literature and critically engaging with them. We examine both historical contexts and contemporary scholarship, practice, and activism related to solidarity, incorporating diverse geographical perspectives. This approach allows us to explore transnational issues that necessitate solidarity and how it has been mobilised to address marginalisation. Some of the themes identified include demonstrations, protests, and rallies as forms of solidarity; petitions as a form of solidarity; strikes as a form of solidarity; encampments as a form of solidarity; and online activism as a form of solidarity.

Although no primary data is collected, we refer to examples of solidarity in action to support our arguments. This enables us to maintain a conceptual and theoretical focus while connecting our analysis to broader trends in polarisation and marginalisation.

4. The Nexus Between Polarisation and Solidarity

The concept of solidarity has garnered significant attention across various fields of study, reflecting its multifaceted nature and critical role in contemporary society (Mordacci, 2024a, 2024b; Pongiglione, 2024). Solidarity, understood as unity or agreement of feeling and action among individuals or groups with a common/shared interest, is a powerful mechanism for social cohesion and collective action (Vandevelde, 2024). Our analysis of previous scholarship is guided by a few questions: What justifies the need for solidarity? In other words, would solidarity still be required if every individual, or group in society were to live a comfortable life? It is evident that the need for solidarity would diminish if everyone were to experience their ideal existence. This implication points to the existence of global and local issues that have compelled individuals or groups to act in solidarity to address such challenges, as highlighted in the introductory section of this article. The reasons for solidarity have been explored by recent scholars such as Roberto Mordacci, who noted that the most important reason for solidarity is respect (Mordacci, 2024a), and this respect is both for those we support and ourselves as well. It goes both ways. There is therefore the need for solidarity to support people or individuals who have been disrespected through structures that continue to degrade their human existence.

As we explore this section, it is essential to emphasise that solidarity is likely as ancient as humanity itself and has manifested in various forms across different societies. For example, in continental Europe, sociologists of the past underscored that the demand for solidarity emerged in response to the rise of "rough individualism and harsh capitalism" in evolving urban contexts (Vandevelde, 2024). Consequently, solidarity served as a stabilising force for individuals who perceived this emerging societal transformation as problematic and potentially marginalising for certain populations, leading them to utilise solidarity as a corrective measure (Vandevelde, 2024). Today, the necessity for solidarity remains closely aligned with the imperative to prevent forms of marginalisation that are either currently occurring or anticipated, yet whose effects are evident to those subjected to such injustices.

However, as we argue in this article, one of the factors serving as a challenge to contemporary solidarity as a mechanism for confronting marginalisation is polarisation. This is expected as we do not profess naivety in assuming that all individuals would perceive matters in the same way, thereby preventing the occurrence of polarisation. Our aim here is to demonstrate, drawing on previous scholarship, how the two concepts—solidarity and polarisation—have influenced each other and may have acted as a catalyst in this dynamic. By examining the existing body of scholarship, this section elucidates how solidarity operates at

different levels of society and the ways in which it both mitigates and exacerbates social divides. Before we return to solidarity, let us turn our gaze to polarisation briefly.

No society is homogeneous in ideas and character. Nearly every society is characterised by divisions, which may be rooted in ideologies, identities, class, race, gender, geography, and various other factors. Based on this assertion, it is therefore obvious that people are going to have different opinions, leading to a polarised world as we see today. Though heterogeneity in society might not be bad itself, some form of polarisation can be chronic and dangerous to harmonious cohabitation in society and, in fact, can lead to marginalisation for individuals or groups of people in society. And that is where the problem lies. While polarisation has attracted the attention of many scholars, there is a lack of consensus on its definition. Schedler (2023, p. 341) defines it as "disputes over the definition and decision of collective matters." Polarisation could also be seen as a process in which politics is simplified by offering two conflicting choices (McCoy & Somer, 2021). It is about disputes over collective issues, decision-making, and actions.

Although polarisation manifests in different elements of society, one prominent area of polarisation in contemporary society is the realm of politics broadly perceived. This is because disputes between groups with competing expectations from the government, which usually manifest in resource allocation and political participation decisions, can polarise society (Schedler, 2023). Scholars have shown that political and cultural divisions within American society, for instance, have increased significantly since the 1970s (Abramowitz & Saunders, 2008) and observed that polarisation has become worrisome since it can stress democracy in many countries (McCoy & Somer, 2021; Schedler, 2023), which may hinder collective actions.

Different dimensions of society can lead to polarisation, yet the intersecting effects are more impactful than such elements on their own. For example, things that polarise society, such as political parties, also form along the line of personal identities due to the stability and significance of group membership. Political leaders have employed divisive tactics along existing identity groups, along ethnonational and religious lines, for example, to consolidate their power and electoral advantage (McCoy & Somer, 2021). This appeared to manifest in recent American elections among Democrats and Republicans, where salient social identities such as race and religion converge with party affiliation (Iyengar et al., 2019). While diversity in society is not necessarily bad and reflects Durkheim's idea of organic solidarity, polarisation can promote animosity between groups, which can extend to different social spheres outside the groups. For instance, Iyengar et al. (2019) have argued that the partisan affect among Republicans and Democrats in the USA shapes attitudes and behaviours external to the political realm, such as marriages, where Iyengar et al. (2019) found that some in both Republicans' and Democrats' sides do not approve of relations marrying a person from the other side (Iyengar et al., 2012, 2019). This suggests that collective action for the common good becomes difficult as deciding the public good itself becomes politically charged.

In the midst of the foregoing, where demand for the provision of common goods is required for solidarity among citizens of a nation or member states of a regional block (like EU member countries; see Sangiovanni, 2013), conflict over the common good can hinder solidarity. Solidarity is therefore more needed now than ever because of the increasing polarisation (especially political polarisation) in several countries across the globe. This is because the two influence each other.

Beyond political polarisation, which is more country or regional-based and sometimes with global diffusions, solidarity on a global scale has been a focal point of scholarly inquiry, particularly in the context of

transnational social movements and international activism. Global solidarity often manifests in responses to climate change, human rights abuses, and economic inequality, which transcend national borders. Scholars have highlighted the role of global solidarity in movements like Black Lives Matter and the global climate strikes, where individuals from diverse backgrounds unite under a common cause (Gleason, 2013; Van Gelder, 2011). However, the increasing interconnectedness also brings to light the tension between solidarity and polarisation. For instance, while global movements can galvanise widespread support, they can also exacerbate divisions, particularly when cultural or political differences come to the forefront (DiSalvo, 2015).

National solidarity is critical in fostering social cohesion within countries, particularly in times of crisis. It is a reciprocal obligation among citizens to mutually provide essential collective goods within a country (Schedler, 2023). During events such as natural disasters, economic downturns, or political upheavals, national solidarity can serve as a unifying force. For example, the widespread protests in response to austerity measures in various countries have shown how national solidarity can mobilise citizens against perceived economic injustices (Dixon et al., 2004). Nonetheless, national solidarity is not immune to polarisation. The rise of right-wing populism and xenophobia in several nations illustrates how national solidarity can be co-opted to promote exclusionary agendas, thereby deepening societal divisions (Szporer, 2012). As both a unifying and polarising force, this dual nature of national solidarity warrants a nuanced examination.

At the domestic level, solidarity is vital in community building and local activism. Grassroots movements, local protests, and community-based initiatives often exemplify mechanical solidarity, where shared values and collective identity drive collective action (Tabak & Wagner, 1997). Domestic solidarity is crucial in addressing issues that directly impact local communities, such as housing, education, and healthcare. However, the tension between solidarity and polarisation is evident even at this level. Local movements can become polarised along lines of race, class, and political ideology, leading to fragmented efforts and internal conflicts (Hammond, 2013).

The relationship between solidarity and polarisation is complex and multifaceted. On one hand, solidarity bridges the divide and fosters a sense of collective purpose. On the other hand, the very act of uniting individuals around a cause can also highlight and deepen existing divisions. For instance, online activism, while effective in mobilising support and raising awareness, can also create echo chambers that reinforce existing beliefs and polarised opinions (Stewart & Schultze, 2019). Similarly, strikes and protests, though powerful tools for expressing solidarity, can polarise public opinion and provoke a backlash from opposing groups (Dixon et al., 2004).

Scholars argue that the effectiveness of solidarity in overcoming polarisation depends on the strategies employed and the inclusivity of the movements. Inclusive approaches that seek to understand and integrate diverse perspectives are more likely to foster genuine solidarity and reduce polarisation (Sameh, 2014). Conversely, exclusionary practices that marginalise dissenting voices can exacerbate divisions and undermine the goals of solidarity movements (Hjelm, 2021).

The literature on solidarity reveals its critical role in addressing global, national, and domestic issues. However, the inherent tension between solidarity and polarisation presents significant challenges. Understanding this dynamic is essential for developing strategies that enhance solidarity while mitigating

polarisation. Our study seeks to extend this literature by adding new trends and ways of garnering solidarity in contemporary times.

5. Strategies, Manifestation, and the Practice of Solidarity

In this section we examine the various contemporary issues that have led people to form alliances based on solidarity. It is important to emphasise that solidarity is not merely a theoretical concept, but also a practical strategy employed to effectively address these issues. To this end, Mordacci (2024b, p. 1) asserts that "in many areas of social and political action the idea of solidarity seems to offer a nuanced and practical framework, going beyond the stricter but more abstract requisites of justice or fairness." Additionally, we recognise that solidarity can serve as both an ultimate objective and a method to achieve a desired outcome. For example, while solidarity can lead to outcomes that effectively resolve specific problems, it also holds the value of increasing awareness, mobilising resources, and engaging with individuals in positions of power, among other important functions.

While we seek to underscore the fundamental value of solidarity, we also acknowledge that there are differing conceptualisations of this concept and while some are critical, others might not be. As aptly articulated by Mordacci, solidarity can be categorised into critical and uncritical forms. However, we contend that the primary purpose of solidarity, borrowing from Mordacci, is to foster a sense of collective responsibility and mutual support. Thus, "solidarity is critical when it is based on the recognition of oppression and injustice, which are a violation of the principle of respect, as something that ought to be contrasted as a moral and political community" (Mordacci, 2024a, p. 2). In the following sections, we provide a thematic analysis of various strategies that are employed by people acting in solidarity. This section also shows contemporary illustrations of solidarity as an expansion of Emile Durkheim's theory of solidarity.

6. Demonstrations/Protests/Rallies as Forms of Solidarity

Over the years, demonstrations and protests have gained recognition as effective methods of fostering solidarity. They bring together individuals who are directly impacted by a specific issue, as well as those who are not immediately affected but support the cause of those impacted (Baker, 2019; Kirchhoff, 2021; Kron & Lebuhn, 2020). In such instances, the shared concern acts as a unifying force.

Protests play a crucial role in democratic societies, serving as a vital mechanism for citizens to express their grievances and advocate for change. Through protest, individuals and groups can highlight social injustices, demand accountability from their leaders, and influence public policy. One of the primary functions of protest is to raise awareness about issues that may be overlooked or ignored by mainstream media and political institutions. By mobilising communities and drawing attention to specific causes, protests can galvanise public opinion and encourage dialogue around pressing concerns. This heightened awareness can lead to greater civic engagement, as individuals become more informed about the issues affecting their lives and communities. Moreover, protests can serve as a check on governmental power. When citizens take to the streets to voice their dissent, they remind elected officials that they are accountable to the people. This form of direct action can compel policymakers to reconsider their decisions and policies, fostering a more responsive and responsible government. Additionally, political protests often bring together diverse groups of people, creating coalitions that transcend demographic boundaries. This solidarity can strengthen

movements and amplify their messages, making it clear that the call for change is not isolated to one group but is a broader societal demand.

A pertinent illustration of globalised and national solidarity that we use for illustrative purposes is the anti-apartheid movements. These movements manifested through demonstrations and protests, both domestically within South Africa and internationally. Apartheid was a system of institutionalised racial segregation and discrimination in South Africa that was implemented by the National Party government from 1948 until the early 1990s (Giliomee, 2003). It was designed to maintain white domination while extending racial separation. The policy classified the population into racial groups—white, Black, Coloured, and Indian—and enforced strict residential, social, and economic segregation (Giliomee, 2003). Apartheid laws restricted non-white people's rights, including where they could live, work, and go to school, and prohibited interracial marriages. The ideology behind apartheid was influenced by various factors, including the segregationist practices of the American South, and was justified by proponents as a means to preserve cultural and racial purity and to promote separate development for different racial groups (Giliomee, 2003). This system of governance faced resistance from oppressed communities in South Africa which eventually attracted international solidarity, which contributed to its overthrow.

Anti-apartheid social movements can be characterised as both mechanical solidarity and organic solidarity, depending on the perspective from which one examines them. From a national standpoint, the anti-apartheid movement aligned with mechanical solidarity, as the Black and non-white populations in South Africa felt oppressed and marginalised by the system and united to resist it (Durkheim, 1984/1997; Thijssen, 2012). This collective action was based on their shared experience of oppression and marginalisation. Conversely, we can apply Durkheim's theory of organic solidarity to the transnational social movements and networks that collaborated to ensure the system's downfall. The various communities, groups, and individuals globally may not have directly experienced racial marginalisation; however, their shared commitment to the principle of humanity prompted them to act collectively to combat such marginalization (Herzog, 2018; Mishra & Rath, 2020; Schiermer, 2014; Thijssen, 2012).

We see other examples such as global demonstrations that have taken place in response to the mismanagement of the economy and austerity measures with dire consequences on the lives of ordinary people (Ancelovici, 2015; Klandermans & Van Stekelenburg, 2016), migrant deportation (Abrams, 2016; Hinger et al., 2018; Patler, 2018), and racial discrimination, protested by Black Lives Matter demonstrations across the globe (Shuman et al., 2022; Wright et al., 2023). Our review indicates that individuals in developing countries are against economic mismanagement, dire economic conditions, and the adverse effects of austerity measures on ordinary citizens (Auvinen, 1996; Maganga, 2020). The foregoing suggests the combination of mechanical and organic solidarity to overcome marginalisation in both local and global contexts.

7. Petitions as a Form of Solidarity

Petitions have evolved as a means of expressing solidarity and supporting various causes (Sameh, 2014; Shadiqi et al., 2020; Strange, 2011; Yuen & Tong, 2021; Zaret, 2019). This is particularly notable in academic circles, where signatures carry weight and serve as a platform for scholars to voice their opinions and work together for common or divergent goals (Demirkır, 2021; Irish, 2019; Tutkal, 2023). This has become pronounced during the era of limitation of academic freedoms, workloads, and casualisation of academic staff. During and after

Covid-19, some universities decided to axe some disciplines as they did not see them as viable. In a similar vein, academics again canvassed signatures to support their colleagues who lost their jobs and to implore the universities to rescind such decisions. Although only some members of academia were affected, those who were unaffected by the downsizing policies demonstrated reciprocal obligation towards their affected colleagues to ensure they had the collective good of job security and academic freedom.

Academia, as a centre of knowledge, critical thinking, and social consciousness, has always been at the forefront of societal issues. Scholars understand the power of unity and recognise that their collective voice can make an impact, draw attention to pressing matters, and drive positive change. Signatures provide a tangible and visible way for academics to publicly align themselves with specific ideals, movements, or campaigns. The academic community is diverse, consisting of individuals with expertise in various disciplines. As a result, signatures have the potential to bring together experts from different fields who share concerns about a particular problem. For example, in the face of an environmental crisis, scientists, economists, sociologists, and policymakers may all add their signatures to a joint declaration calling for urgent action. By leveraging their professional authority, their combined signatures enhance the impact of their message, extending its reach beyond traditional academic circles to the general public and policymakers. The type of solidarity exhibited among academics as a cohesive unit can be classified as mechanical solidarity, as posited by Durkheim. However, when professionals or experts from other areas join in providing support for their cause, this solidarity can be characterised as organic solidarity.

8. Strikes as a Form of solidarity

Strikes have historically been a powerful way for workers to show their unity and fight for better working conditions, fair wages, and improved rights (Dixon et al., 2004; Szporer, 2012; Tabak & Wagner, 1997). This type of protest allows workers to demonstrate their solidarity and send a strong message to employers and policymakers that their grievances cannot be ignored (Dixon et al., 2004; Szporer, 2012; Tabak & Wagner, 1997). Strikes can take many different forms, from small-scale walkouts to nationwide or industry-wide shutdowns. They disrupt business operations, highlighting workers' importance in producing and delivering goods and services. By withholding their labour, workers show the economic impact they have and force employers to address their demands. In addition to their economic impact, strikes also build a sense of solidarity among workers. They stand together, recognising that they all face similar challenges and are working towards a common goal. This collective action fosters camaraderie and boosts morale, empowering workers to fight for their rights. Furthermore, strikes often gain public attention and support. They become focal points for social justice movements, receiving media coverage and amplifying workers' voices. This puts pressure on employers and policymakers to address workers' concerns. Solidarity strikes, where workers from different industries support each other's causes, create a broader movement that increases the chances of successful negotiations and positive outcomes. While strikes may cause disruptions and temporary inconveniences, they are crucial in driving social change and improving working conditions. They represent unity, strength, and determination, emphasising that workers are not alone in their struggles. As a form of collective solidarity, strikes have the potential to promote fairness, justice, and equality in the workplace, ultimately benefiting the entire workforce and society as a whole. The type of solidarity exhibited among workers in a particular industry as a cohesive unit can be classified as mechanical solidarity, as posited by Durkheim. However, when other workers of other industries join their strike in solidarity with their colleagues' cause, this solidarity can be characterised as organic solidarity.

9. Encampment as a Form of Solidarity

In recent years, encampment has emerged as a potent strategy of solidarity. It is an overt form of protest wherein individuals congregate, often in outdoor spaces, to assert their demands and foster a sense of community. While encampments have been utilised throughout history, they have garnered renewed attention and significance within contemporary social and political movements. Encampments offer a gathering place for marginalised groups to congregate, mobilise, and amplify their voices. For instance, across various university campuses in the Western world, we have noticed encampments as a form of protest against the ongoing war in Gaza by students. In addition, the Occupy Wall Street movement, which commenced in New York City's Zuccotti Park in 2011, sought to challenge economic inequality (Gleason, 2013; Van Gelder, 2011). The potency of encampment lies in its capacity to establish a visible and tangible presence (DiSalvo, 2015; Van Gelder, 2011). The physical space becomes a beacon, attracting supporters and bystanders alike (Hammond, 2013). Passersby cannot disregard the encampment, stirring curiosity, dialogue, and, in certain instances, engagement. This visibility raises awareness regarding noteworthy social and political issues that may otherwise be overlooked or dismissed. Individuals who may not ordinarily interact with one another are brought together through a shared struggle. The encampment transforms into a collective refuge, a sanctuary wherein individuals can find support, fellowship, and a sense of belonging. Shared experiences forge connections, fostering trust and resilience in adversity. Encampment serves as a quintessential example of organic solidarity. This phenomenon arises from the collective mobilisation of diverse groups and individuals worldwide who advocate for the Palestinian cause, recognising the marginalisation experienced by this community. Their activism functions as a means of addressing and overcoming such marginalisation.

10. Online/Digital Activism as a Form of Solidarity

Online activism, also known as cyberactivism, is a powerful tool for expressing solidarity and advocating for social and political causes. It leverages the internet and digital platforms, allowing people from diverse backgrounds to connect and unite for a common purpose (Ainomugisha & Mwesigire, 2024; Stewart & Schultze, 2019; Uwalaka, 2024). One advantage is the ability to quickly and efficiently reach and mobilise many people. In recent times, we have seen young people in Africa using this strategy, including Ghana (#FixTheCountry, 2022), Kenya (#OccupyParliament and #RejectFinanceBill 2024), and Nigeria (The #EndSARS revolution), to mention but a few. Through social media platforms, activists can disseminate information, share stories, and raise awareness about various issues (Bodunrin & Matsilele, 2024; Stewart & Schultze, 2019). This creates a virtual community of supporters, fostering solidarity among individuals who may have otherwise been isolated in their advocacy efforts. Online activism also democratises social and political participation, as it lowers barriers to entry (Saka & Ojo, 2024). Anyone with an internet connection and a device can engage in online initiatives, making them more inclusive and accessible. This inclusivity fosters a sense of solidarity by showing that people from all walks of life can come together for a common cause. Additionally, online activism provides a platform for marginalised communities to amplify their voices. It enables historically underrepresented groups, such as racial minorities, LGBTQ+ individuals, and people with disabilities, to share their experiences, advocate for their rights, and demand social justice (Saka & Ojo, 2024; Stewart & Schultze, 2019). Online activism promotes solidarity by uniting these communities, highlighting shared struggles, and creating a sense of collective empowerment. The type of solidarity exhibited among youth groups in Ghana, Nigeria, or Kenya, as well as other online activism can both be categorised as mechanical as well as organic solidarity.

11. Conclusion

In this article, we examined the enduring relevance of solidarity as a framework for addressing global challenges in an increasingly polarised world. Motivated by the pressing need to combat marginalisation, injustice, and systemic inequalities, we explored solidarity's dual potential to unite communities and exacerbate divisions. Drawing on Durkheim's theories and integrating emerging concepts like digital solidarity, we highlighted the diverse manifestations of solidarity, its interplay with polarisation, why it should be considered by policymakers, and its practical applications in addressing issues such as climate change, racial inequality, and economic justice.

Our article adds to the existing literature by re-emphasising and underscoring the need for inclusive and collaborative approaches that bridge societal divides while leveraging solidarity's transformative potential. Future research could investigate the ethics of solidarity, its effectiveness in bridging divides, and its role in addressing catastrophic and existential risks. Expanding the study of digital solidarity and exploring the conditions under which solidarity fosters inclusivity will further deepen our understanding of its potential to navigate complex global challenges.

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Conflict of Interests

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The High Price of Gender Noncompliance: Exploring the Economic Marginality of Trans Women in South Africa

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Abstract

This study brings trans women to the forefront of global discourse on gender-based economic inequalities. Such discussions, often lacking intersectionality and narrowly focused on cis women, have frequently overlooked the distinct economic obstacles trans women face in cisheteropatriarchal societies. Grounded in critical trans politics and intersectionality, this research explores the lives of five trans women in South Africa, examining the contextual norms, practices, and policies that shape their experiences of economic inclusion and exclusion. Findings reveal that economic marginality for trans women is upheld by social institutions prioritizing cisgender norms, reinforcing biology-based gender binaries that render those existing outside these frameworks vulnerable, disposable, and disenfranchised. This structural economic bias is reflected in four key areas: (a) patriarchal family systems enforce conformity to cisgender expectations through abuse, financial neglect, and rejection, displacing trans women into precarious circumstances, including homelessness and survival sex work; (b) cisnormative workplace conventions demand legal gender alignment as a precondition for organizational access and employability, shutting out trans identities lacking state recognition of their gender; (c) institutionally entrenched anti-trans stigma creates heightened scrutiny and discrimination during hiring processes; and (d) a gender-segregated labor system undermines trans women’s ability to participate in both “male” and “female” jobs due to nonadherence to traditional, biologically defined gender roles. These cisgender-privileging norms intersect with racism and colonial-apartheid legacies, compounding economic difficulties for trans women. By mapping the economic conditions of historically invisibilized trans women, this study deepens the scope of economic transformation theories. It calls for a trans-inclusive, intersectional model of economic justice, advocating for institutional cultures that embrace diverse gender expressions beyond static gender classifications.

Keywords

cisgender norms; economic exclusion; gender binary; gender economic equity; labour systems; South Africa; trans women

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1. Introduction

Trans women embrace self-chosen identities as women, rejecting the gender meanings ascribed to their male-assigned bodies at birth (Salamon, 2010; Stryker, 2013). Attitudes, systems, and practices that rigidly adhere to traditional, binary understandings of gender perpetuate discrimination against this gender-transgressive population of women (Silva et al., 2022). This discrimination, stemming from embodied gender noncompliance, impacts how trans women participate in many societal systems, including the economy (Greene & Ervin, 2024; Stryker, 2013). For example, the National Trans Discrimination Survey (Leppel, 2016) conducted in the US found that a staggering 14% of trans women were unemployed in comparison with 6–8.9% of the general population. In South Africa, this economic marginalization translates to considerable structural barriers in terms of economic security, employment, and income for many trans women, who on average earn less than R2,000 per month, or USD 130 (Van der Merwe et al., 2020). Beltran et al. (2019) explain that trans women face pervasive economic exclusion across various global settings due to their deviation from culturally entrenched gender norms.

Nyeck et al. (2019) found that heterosexual, as well as lesbian, gay, and bisexual individuals who performed their gender in non-normative ways, were less likely to be employed than heterosexual persons conforming to gender norms. Additionally, the monthly earnings of heterosexual men and women, as well as gay and bisexual men who did not adhere to gender norms, were on average 30% lower than those of heterosexual men who conformed to gender expectations (accounting for socio-demographic characteristics and job type). Although the study does not exclusively investigate trans people, it reveals that being gender diverse, regardless of sexual orientation or gender category, is a source of significant economic vulnerability and disadvantage. Leppel (2016) adds that discrimination in hiring practices is driven by negative institutional perceptions of trans identities, particularly when gender expression doesn't conform to cisnormative ideals. Here, the concept of cisnormativity refers to the assumption and belief that being cisgender is the norm and default state of being (Serano, 2007). The term cisgender refers to individuals whose gender identity aligns with the sex they were assigned at birth (Aultman, 2014). Non-normative gender expressions, therefore, predispose trans women to higher unemployment rates and increase workplace discrimination, especially for trans workers and job seekers who have not undergone medical transition (Reisner et al., 2016). This has devastating implications in terms of access to basic human rights like housing and social security. Harrisberg (2019) uses the example of a Cape Town-based trans activist group, Sistazhood, explaining how the inability to secure housing prevented the opening up of a bank account, which prevented the securing of employment.

In 1994, South Africa transitioned to a democratic system, promoting equality and inclusion after a long history of colonial oppression based on race, class, and gender (Kehler, 2001). This transition included constitutional protections for trans identities, prohibiting discrimination based on gender, sex, and sexual orientation (Klein, 2009). However, these acts, along with policies governing labor systems, have failed to specifically recognize and address the economic rights and freedoms of trans people (Isaacs et al., 2020). There remains a significant lack of non-discrimination employment policies for LGBTIQ individuals, including trans women, in government institutions, reflecting ongoing structural prejudice and challenges in implementing gender diversity policies (Akala, 2018). Where such policies do exist, South African trans women are often grouped within the broader LGBTIQ community, which tends to prioritize the interests of gay and bisexual men (Isaacs et al., 2020). Existing gender development frameworks, which focus on cis women's experiences, fail to address the intersection of sexist and cissexist oppression that compounds the

economic marginalization of trans women (Johnson, 2015). Here, the term sexism refers to prejudice or discrimination based on a person's sex or gender (Rose, 1979), while cissexism denotes the belief that being cisgender is superior to being trans (Stryker, 2013). This lack of trans visibility in feminist and queer development practices prevents trans women from being adequately represented and integrated, both economically and politically, into South Africa's national development plans. Addressing the unique discrimination and social exclusion faced by trans women, especially in the workplace, is urgently needed.

Social variables such as age, gender, education, marital status, health and (dis)ability, ethnicity, and race have been shown to powerfully mediate the status of a labor force (Bowen & Finegan, 2015). However, theorizing about gender's role in labor participation often overlooks the subordination of trans women. For example, the Women Empowerment and Gender Equality Bill in South Africa does not explicitly address trans women in its definition of gender discrimination (Isaacs et al., 2020). In addition to gender, trans women also contend with the impact of culture, race, and socio-economic-political history in the post-apartheid context. This lack of intersectionality, where women's economic inequities are framed through a reductive cisgender-focused lens, marginalizes trans positions. As a result, gaps exist in capturing trans women's stories, perspectives, and histories in economic discourse. This discursive exclusion blinds scholars, activists, and practitioners to the social structures and processes that perpetuate trans women's economic vulnerability. Acknowledging this limitation, this study seeks to qualitatively investigate the economic experiences of trans women in South Africa. It aims to deepen understanding of the social structures and processes that perpetuate trans women's economic exclusion from a critical stance.

The framework informing this study is critical trans politics (CTP), enhanced by intersectionality. CTP provides an institutional critique, enabling the structural examination of the economic injustices that trans women face in a country like South Africa, where divisions of gender, race, and class persist. CTP fundamentally challenges the assumption of neutrality within social institutions, critiquing how structures like healthcare, law, education, and family reinforce cisnormativity and the gender binary (Spade, 2015). Here, the concept of the gender binary is understood as a classification system that divides gender into two distinct and opposite categories: male and female (Laqueur, 1990). CTP questions how binaried social systems, such as places of work and government regulations, privilege cis people while relegating trans individuals to subordination and vulnerability. Central to CTP is the idea that trans oppression is perpetuated through institutions that impose rigid, administratively determined gender categories, placing those who do not fit neatly into these categories "in danger" (Jourian, 2017). By incorporating intersectionality, CTP also emphasizes how gender intersects with race, class, and (dis)ability to shape the economic oppression of trans women. Unlike mainstream trans rights movements, which often focus on inclusion and legal reform, CTP seeks to dismantle oppressive systems and the logics upon which state, civil society, security, and social equality are founded, rather than merely achieving recognition within them (Spade, 2015). Embracing this radical political philosophy, this study seeks to deconstruct and dismantle the institutional structures and cultural processes that reinforce the gender binary and thereby uphold the economic marginalization of trans women.

2. Methods

This study forms part of a larger project that qualitatively and critically, explored South African trans women's experiences of inclusion and exclusion across healthcare (Shabalala & Campbell, 2023), educational (Shabalala & Campbell, 2024), and economic contexts. This particular study presents the findings from the third focus

area of the project—economics. Drawing from a critical narrative approach (Fraser, 2004), the authors use narratives to understand better the social structures that perpetuate the economic alienation of trans women by answering the following questions:

1. What narratives of economic inclusion and exclusion do South African trans women share?
2. What are the gendered norms, practices, and societal structures that influence these experiences of economic inclusion and exclusion, for South African transwomen in the labor system?

The analysis seeks to understand how trans women's narratives of economic struggle are influenced by the larger sociocultural and political environment, actively breaking down these narratives to deconstruct and challenge the reproduction of power and oppression embedded within trans women's experiences.

2.1. Participants

This study included five trans women living in South Africa. Two participants (pseudonyms Phumeza, aged 29, and Mpho, aged 22) lived in Gauteng, a culturally diverse, urban province with strong infrastructure and economic opportunities, despite deep economic inequalities amongst its population. Two participants were from Limpopo (pseudonym Shanduka, aged 30, and Lerato, aged 29), and one was from the Northern Cape (pseudonym Laila, aged 29). Both the provinces of Limpopo and the Northern Cape are rural and economically poorer with less infrastructure and development, and fewer economic opportunities. Importantly, the voices of these participants are not meant to represent the entire trans community in South Africa, given the heterogeneity of trans people's experiences. However, these voices are powerful examples of trans women's economic contexts and the rules that shape them. Instead of searching for a singular narrative, CTP as a framework seeks out "multiple, competing, and conflicting renderings of reality" (Pasque et al., 2012, p. 13), encouraging intersectionality and complexity.

2.2. Sampling Strategy

Purposive sampling was used where a poster was designed and shared online by the first author through various social media channels which included WhatsApp, Instagram, and Facebook. The poster was distributed through user online networks and interested individuals contacted the first author to participate in the study.

2.3. Data Collection

Semi-structured, individual telephonic interviews were conducted over two months during 2021, lasting between 60 to 90 minutes. Participants were asked about their personal experiences in the South African labor system (e.g.: "How has being a trans woman impacted your experiences at work?" "What difficulties do you typically experience when accessing employment?" "What has been positive about your experience in employment settings?"). Interviews were audio-recorded and transcribed for analysis.

2.4. Data Analysis

In order to "avoid the perils of both individualistic and social reductionism that have plagued the human social sciences for generations" (Tappan, 2005, p. 50), a critical narrative methodological frame was adopted

to analyse trans women's lives in South African economic contexts. Critical reflection was adopted as a key methodological component to inform the analysis, which focused on meaning-making, adopting a holistic approach as opposed to a categorical one to analyze stories. Within this frame, the focus was on holistically deconstructing the assumptions, ideas, and social rules that surface through the participants' storytelling (Fook & Gardner, 2007) about their experiences navigating family structures and employment contexts. Drawing from the idea that individual stories are better told and interpretively made sense of within broader structural and institutional narratives they are situated in, this study drew upon a narrative frame introduced by Fraser (2004) that proposes an overlapping phased analytical procedure that embraces the analysis process as flexible.

As actively engaged enquirers, the analysis process began by reflectively listening to the stories as they were narrated (Kleinman & Copp, 1993; Olson & Shopes, 1991). After carefully listening to the stories, through transcription, the narratives shared were intimately engaged with (Fraser, 2004). Following this, each of the individual transcripts was immersed in, noting the themes that emerged in the stories as well as the types of stories (Fraser, 2004). To minimize the risk of looking at the stories through a single isolated lens, the participant experiences were explored and unpacked along various dimensions—namely, the intrapersonal, interpersonal, cultural, and structural dimensions (Fraser, 2004). Stories that may be otherwise considered personal were explicitly examined for their interpersonal, cultural, and structural aspects. As an extension of the previous phase, this phase involved linking the themes that emerged to larger societal structures and systems of power (Fraser, 2004). This entailed an exploration of the hegemonic discourses and broader social conventions that framed the understanding of the stories. Through translating narrative content into a formal written analysis, the last step of analyzing was a formal written presentation of the stories (Fraser, 2004), recognizing the interpretive process that had pulled different parts together to create a story of its own.

3. Results

Four salient themes emerged from the thematic analysis: (a) financial neglect in families: a tool for control and enforcing conformity to cisgender norms; (b) living on the edge: homelessness, precarious living, and vulnerability; (c) hiring discrimination and hypervisibility; and (d) a gender-divided workplace: problematizing gender incongruence and the demand for legal gender recognition as a precondition to employability.

3.1. Financial Neglect in Families: A Tool for Control and Enforcing Conformity to Cisgender Norms

Participants experienced familial rejection often in response to them deviating from the gender identity and related gender script, assigned to them at birth. This deviation resulted in the withdrawal of financial support, which often had a considerable socioeconomic impact. Here Lerato begins by explaining that family and society go "hand in hand":

> I mean, they were supportive but some or most [of the time] they were not….My family was so, so discriminative and stuff like that….Because even now, I am on a journey to transition. So, it's hard for me because they are family. They are society.

Lerato describes her family as an extension of broader society, including its prejudices. Lerato felt unable to speak to her family about the painful discrimination she was experiencing at school because of her identified

gender expression, due to the social disapproval she felt from them. “Some other days I would not report things [at school]. I would feel like my parents are going to be involved and they will know I am wearing skirts at school. So, it was an embarrassment for me.” In this example, Lerato reports being unable to draw from family support at home because she believed it would create further tension and conflict. As a consequence, she was left to manage the rejection from her school and family systems alone.

Mpho’s experiences of family rejection because of her gender identity and expression align closely with Lerato’s. Mpho explained how her father “always says bad things. He’s so negative. So, there are three occasions where he violated me….I went to him so he can take me to school in his car and I was wearing a dress and he was like, “Take off that shit!” What he does, he never speaks to me like he’s speaking to a person. He always speaks to me like he is speaking to some kind of an animal….There’s no love, no care….He once beat me in front of people.” Her father’s command—“take off that shit”—is a powerful illustration of his expectations of how gender should be expressed in his home, in terms of behaviors and appearance. This example could be understood as a form of gender policing where Mpho was experienced by her father as disobeying the gender script assigned to her at birth, and in response he needed to enforce more acceptable gender norms onto her.

A similar incident was shared by Phumeza with her father: “Ja, he would actually tell my brother that whenever he sees me with anything that is for women or playing dress-up, he must just beat me.” Phumeza’s deviation from this normative script, resulted in her family withdrawing financial support from her. Here her family rejects her gender identity and gender expression through financial neglect which has severe consequences for Phumeza’s future:

> I only went to school for those two years, which the next two years were when he disowned me….He was able to look me in the eyes and tell me….I made you who you are today….The thanks I get from you is you being who you are? Then I don’t have money to then take you to wherever you want to go.

These examples of gender policing and financial neglect as a punishment for gender congruence must be understood within the context of other intersecting factors that Lerato, Mpho, and Phumeza face as young, black women living in post-apartheid South Africa. Due to their race and class, economic dependency on family becomes more pronounced in contexts where poverty is pervasive, and job opportunities are limited. Against this backdrop, the withdrawal of financial support is not merely an exertion of control but a direct threat to survival. Many simply cannot afford to leave their family homes or cover even their basic needs without familial support, let alone transition-related expenses such as hormone therapy or surgeries. This economic vulnerability allows families to maintain control through financial neglect, leaving these women with very few avenues for asserting their autonomy.

3.2. Living on The Edge: Homelessness, Precarious Living, and Vulnerability

Compromised relationships with family had a considerable negative impact on the economic capabilities of these participants. Familial rejection exposed some to vulnerabilities and precarious living conditions, while familial acceptance was associated with increased self-confidence and better financial access and security. For example, Phumeza left her family home because of how her father regulated her gender. She described an incident where her father explained: “I cannot have a homosexual child.” Phumeza noted:

> He said [that] his sperms never popped out a homosexual. So, he can never raise a homosexual....He is expecting a guy from me. He is expecting a child who will carry the family name. He is expecting a man who is going to marry a woman and all that. So I then departed and started my life.

Phumeza's later descriptions of her experiences of homelessness, lack of psychological safety, and social and economic security emphasize her vulnerability as a consequence of this decision:

> It was very difficult because now you're used to having people who are beside you. So, now you have to start on your own in a community where you don't know anyone; live in a place where you're also scared of what's going to happen. You're also on your own wondering what's going to happen tomorrow? How am I going to survive today?

Here Phumeza's narrative demonstrates the powerful fall-out leaving home, in the form of a reduced sense of safety in the environment and world around her, economic insecurity and vulnerability, and homelessness.

Lerato's experiences are similar. She also describes this link between familial rejection of her gender identity and gender expression, and punishment through withdrawal of financial support, which pushes Lerato to leave her family home. This decision is seen in her narrative to have an immediate economic effect:

> We are unemployed and our families have kicked us out of the houses. We are homeless....I have to hustle myself for food and everything. Family does not support that much....They were supportive, but some, or most, were not....At home, everything you do for yourself. You buy groceries for yourself, you buy food for yourself because your family won't provide. You have to go to health facilities for yourself, everything you have to buy.

Lerato described how she turned to sex work as a way of taking financial care of herself:

> So, I had to become a sex worker because people didn't understand. I had to go and stay in town and work there and then that's when we became sex workers and we met some other trans....We did sex work to pay our rent, to buy groceries, and stuff like that.

Both Phumeza and Lerato found themselves living outside of their families' protection, struggling to meet basic needs for health, shelter, food, and education. Here, family rejection is revealed to have powerful negative economic consequences for these women. However, not all participants' narratives included this theme of familial rejection, that led to such economic vulnerability. Laila shared affirming stories of acceptance within her family. On the evening she decided to disclose her gender identity she explained:

> My dad was actually....I was actually surprised because I know my dad. He always wants to be in control and in command. And he always has the last word, but he was so calm that night, he was cool. And then he was like, "Whatever makes you happy as an individual." I think because he is an educator, hence, he understands me more clearly.

Phumeza shared a similar narrative of the acceptance and protection she received from some members of her family, particularly her mother:

> If I am able to accept it [my identity] and if my family accepts me then I don't feel that any other person would have much visibility in my life. Because, if my family they are happy and also within myself I am happy, then everything is just a roll in a park. But if…I discredit myself and my family does that too then it's easy for other people to do that too. It's very easy.

Phumeza's and Laila's narratives speak to the protective power of family support and acceptance of their gender identities and gender expressions. Neither had to make the choice between expressing their identified gender and receiving familial acceptance, inclusion, and support. As a result, both were afforded a degree of economic protection within the family system, as they were able to establish themselves as young adults. This is in strong contrast to Lerato's experiences, who as a consequence of her familial rejection, pursued sex work as a means of taking financial care of herself. This precarious situation is intensified by the high levels of unemployment and poverty disproportionately impacting black communities across South Africa, leaving individuals like Phumeza with limited avenues to rebuild life independently. In communities where unemployment is already widespread, sustainable work is even more difficult to secure for those who must also contend with discrimination based on gender identity. South Africa's deeply racialized economic landscape further compounds these challenges; black trans women, already marginalized by the structural legacies of apartheid and ongoing societal bias, face compounded barriers to survival with minimal access to institutional support.

3.3. Hiring Discrimination and Hypervisibility

Through hiring processes participants reported discrimination in the form of hypervisibility that exposed them to scrutiny and negative bias, disadvantaging them as job seekers. Lerato described how her gender became a source of discrimination during a job interview:

> They asked me this question: "If we give you this job, what are you going to do?" Then I told them that I am a parent. I have a daughter and so I had to provide for her. So, for them, it was like: "You're a trans* woman but you have a daughter?" So, that thing triggered everything. Discrimination started: "How come? You are not okay. You should go and see a psychologist because this thing of yours is a disorder." It wasn't necessary for them to ask me those questions because it was an interview, where I had to come to work, not to be asked about my gender.…It was in a very judgemental way, in a very degrading way.

During this interview, Lerato's gender identity and her life more broadly, became the focus of enquiry, instead of her unique skills, personality, and the contributions she could make to the job she was being interviewed for. Lerato's social identity was scrutinised and pathologised as a psychiatric disorder that she should seek psychological assistance with. This was one instance in a pattern of interactions Lerato had endured during hiring processes where her identity as a trans woman was the focus: "After my matric, I tried to apply to a few jobs in a few places. So, for them, the issue was that I was a trans* woman…whenever I went to an interview, whenever I would wear my clothes, they would call me names."

Upon successfully entering organisations, participants reported little organizational protection when reporting instances of discrimination. Phumeza explains:

> I've encountered a lot because I even had to say this to this other woman…who stood beside the gate terrified of me and told me about my sexuality and all that. Then we went to the hearing. However….HR was not well aware of what LGBTIQ is. Hence, I'm saying that they only know that…a trans* woman is "a gay" too. A trans* man is "lesbian" as well. They were not aware of the differences and this and that.

Phumeza's experiences speak to poor knowledge and awareness of sexual and gender diversity, as well as a lack of workplace policies that address this type of discrimination, allowing for the perpetuation of these stigmatizing practices. Lerato's and Pumeza's accounts illustrate a narrative of economic marginalization which is gendered. These narratives highlight current South African labour practices that are unlawful, and institutionally disadvantage trans women from fairly participating in the labour economy. For black trans women, this discrimination is compounded by the racial and economic realities that already marginalize them. In South Africa's highly competitive job market—especially more challenging for working-class black individuals—these exclusionary practices significantly narrow the economic pathways open to trans women. The hiring discrimination faced by individuals like Lerato and Phumeza extends beyond gender identity, deeply interwoven with the intersecting forces of race and class. To add, many black trans women come from low-income backgrounds, where access to quality education and stable employment is limited, making formal jobs a critical means of economic security. Exclusion from the job market, however, leaves them with few alternatives, often forcing them into precarious, informal work—such as sex work—simply to survive. This ongoing exclusion intensifies their economic vulnerability, locking them into cycles of poverty, social exclusion, and marginalization that become difficult to escape.

3.4. A Gender-Divided Workplace: Problematizing Gender Incongruence and the Demand for Legal Gender Recognition as a Precondition to Employability

Participants reported experiences of a South African labour system that used gendered employment practices which disadvantaged them as trans women. Here participants explained how access to employment opportunities was regulated by institutional conventions that required trans women to align their gender expressions to their legal gender categorization, as assigned to them at birth. For example, Phumeza explained:

> I had an incident at work whereby I came in…being who I am. So, now because I had not changed my gender marker and my sex—my ID still presented as male, my sex was still male, as well as my name…it became a problem now when they saw what they saw and when they saw what was written on the ID. It became confusing to them. [They said:] "You are not the person that we're seeing in the ID. There is confusion." Then I had to tell them: "What you see is this, what the ID says is going to be worked out."

The organization operated on the assumption that a person's self-designated gender will always match their legal gender categorization, which is not the case for trans women. Phumeza's narrative reveals gender as not merely personal property, but a legal construct that has a powerful impact on economic participation.

Similarly, Laila described her work environment:

> They were like: "You are male. Everything [about] you says you are male." I was already busy with the transition but then my ID wasn't changed yet and a lot of documents [weren't either]. So, I needed to

> change that first....They said: “You must submit every pre-authorised document that states that you are now transitioning, since when are you transitioning, and where are you now. Can we pronounce you as a woman?” They were questioning a lot of things. They were questioning a lot and they would put you in such an awkward position....They would want to see if my breasts [were] real breasts.”

In order for Laila to access employment in this example, she needed to align her expressed gender with her legal gender categorization. This requirement suggests that gender is seen as a fixed construct in these hiring processes, which excludes people who have rejected this assigned gender categorization. Here, Laila’s identity required legitimization through documentation, and because of this, her right to self-determination was undermined.

This demand for legal alignment highlights how employability becomes conditional upon navigating complex bureaucratic and legal processes—a task particularly challenging for black trans women from working-class backgrounds, who often lack the financial means or social support to update their gender markers. Economic marginalization among black trans women, who are frequently unemployed or underemployed, fuels a vicious cycle: without a stable income, they cannot afford the legal and medical procedures required to change their documents, and without these documents, they encounter persistent barriers to employment. These requirements disproportionately disadvantage black trans women, who bear the compounded burdens of economic inequality, systemic racism, and bureaucratic exclusion.

Furthermore, participants in this study described a labour system focused on rigid and restrictive divisions of labour based on stereotypical gender roles. These divisions rendered the participants in this study, as trans women, undeserving and unfit for particular roles that had traditionally been allocated to cisgender women. Shandukani described her experience: “Last of last year, they were hiring from the community. I couldn’t get those jobs because they were for females and I’m a ‘male.’ ” Phumeza made a helpful reflection:

> So, let’s say you are applying for a receptionist job and I happen to go there. It becomes something to them...having me become a receptionist. “How are you going to go about doing what we say a woman would do for the job?” So it’s more of a disadvantage....[They would say:] “How are you going to cope with doing those things because you are a ‘man?’” Yes, they know what you are, but for you to do “women’s” stuff, [they question if you] are you going to be able to handle the pressure and all that.

Both Shandukani and Phumeza describe these experiences as a denial of their womanhood where they were evaluated and found unfit for these occupational roles based on their legally allocated gender.

Yet, there were also positive accounts of inclusion in these narratives which provide insights into how change and reform may be possible. Shandukani, for example, described how organisational culture influenced her sense of being understood, seen, and validated:

> I’m also a tutor. I am a tutor and I felt included in the organisation where I am working. They understood me from the very first day [they saw me]....I am working in an environment of males but...the level of respect is very high.

Phumeza shared a similar experience of how the act of being seen and visible within her workplace as a trans woman impacted her self-esteem:

> I think it was last year on Women's Month when I had to be an MC of that event for all the women. We were celebrating Woman's Day and my HR actually said that I needed to share my whole story and the essentiality of me being in the company and me being who I am. So, then, that made things very, very easy because now, if I taught 30 or 40 women, then 100 or 200 men are most likely to be educated by these women that I have taught [on] what a trans* person is and what I am and what they need to see when they see me all the time at work.

Here Phumeza was able to own her self-assigned gender identity and related experiences. Such validation is powerful in the face of a pervasive history of institutional silencing.

4. Discussion

The narratives shared by the five trans women in this study bring to light the economic marginalization they endure within a cisgendered South African society that systematically benefits, supports, and protects cis individuals while isolating and excluding trans identities from meaningful economic participation. The structural mechanisms that uphold trans women's economic marginality were captured through four key themes identified in the narrative analysis: (a) patriarchal family systems enforce conformity to cisgender expectations through rejection, financial neglect, and ostracization, driving trans women into precarious circumstances such as homelessness, survival sex work, and other forms of vulnerability; (b) organizational conventions grounded in cisgender norms reject trans job seekers who cannot provide legal proof of their gender, effectively shutting them out of employment prospects; (c) heightened gender discrimination and scrutiny, particularly during hiring, due to entrenched anti-trans stigma in the workplace; and (d) a gender-segregated labor system enforcing traditional gender roles, excluding trans women from "male" and "female" jobs because they do not neatly fit into these biology-defined binary classifications. Each theme is discussed below, with attention also given to the compounding effects of racial disenfranchisement on trans women's economic well-being in post-apartheid South Africa.

First, family structures were revealed to be governed by cisheteropatriarchal values that privilege cisgender, heterosexual norms, and male authority (Mauldin, 2023). The familial rejection that trans women face due to non-compliance with the gender rules imposed by family systems leads to increased economic vulnerability. Trans women's embodied gender transgressions are policed through emotional, verbal, and physical abuse within the family unit. Family systems also police gender conformity by withdrawing financial support. This financial control, combined with the ostracization they encounter, often results in homelessness, posing serious threats to their socio-economic security. Fineman (2013, p. 307) observes that strained relationships between trans people and their families limit access to resources necessary for "growth in the present" and to "build and preserve possibilities and opportunities for the future." The consequences of familial rejection and displacement lead to struggles for economic survival, making it difficult to access basic rights such as food, shelter, healthcare, education, and mobility—all commodified essentials in largely capitalist societies like South Africa. According to Shelton (2015), trans people experience higher rates of homelessness than cis individuals. A study by Carpenter et al. (2022) revealed that trans women are also less likely to be employed, have higher poverty rates, and report greater food insecurity compared to cis people. Kattari and

Begun (2017) found a connection between homelessness and survival sex among trans individuals in the US, a link further highlighted in this South African study, where participants reported engaging in survival sex to secure basic necessities such as food, clothing, and shelter. Altogether, the stories of the trans women in this study divulge that existing outside the bounds of cisgender norms exposes them to severe economic danger—conditions marked by instability, unpredictability, precarity, vulnerability, and "living on the edge." Additionally, black trans women from working-class communities are particularly more vulnerable to homelessness, as limited social support systems and the enduring legacies of apartheid leave them with fewer opportunities for upward mobility. The entrenched racial inequalities within South Africa's economic system intensify their precariousness, making it even more challenging to break free from cycles of poverty, homelessness, and financial survivalism after being ostracized by their families.

Second, while trans women experience economic displacement due to gender prejudices within family microsystems, they are also subjected to a cisgender-oriented labor system when seeking work that does not require them to abandon their authentic identities. Trans identities are often expected to align with the gender marker on legal documents to be accepted as credible and employable by cisgendered organizations that uphold the colonial view of gender as a fixed classification (Brewster et al., 2014; Sheridan, 2016). Employment practices rigidly operate on the cisnormative belief that an individual's self-identified gender must align with their legally assigned gender. Consequently, trans women, especially those without legal recognition, are frequently questioned and dismissed during recruitment when discrepancies arise between legal documents and self-identified gender, leading to job exclusion. This reflects how employment settings and industries are rigidly structured around a cisgender-biased binary model that accommodates cis workers while persistently problematizing and isolating trans individuals whose gender identities may not align with their birth-assigned legal classifications. Kelly (2019) confirmed that companies overemphasize binary gender norms. The institutional demand for legal gender congruence, which favors cisgender individuals, fundamentally constrains trans women's rights to equality, dignity, and freedom of expression within organizations. While the entrenched gender binary disadvantages all trans women, black trans women are disproportionately affected by the intersection of racial and economic inequalities in South Africa (Shabalala et al., 2023). The legacy of apartheid continues to shape labor market structures, where black workers, particularly from working-class backgrounds, face more employment barriers (Kunnie, 2018). Additionally, cisgender-privileging systems in workplaces assume access to resources needed for legal gender recognition—resources that many black working-class trans women lack due to poverty and limited social support networks.

Third, institutional expectations of cisness require compliance with stereotypical gender presentations aligned with legal classifications of "male" and "female" to participate in the workplace without undue scrutiny. The trans women in this study, who do not align with cisgender norms, reported significant gender-based discrimination in employment settings. This aligns with global findings indicating high rates of workplace discrimination against trans people (Boncori et al., 2019; Dietert & Dentice, 2009). An EU-wide survey by the European Union Agency for Fundamental Rights (2014) found that 54% of trans respondents experienced discrimination or harassment due to being perceived as trans. Similarly, a US survey of 6,436 trans men and women reported that 50% faced workplace harassment, and 44% experienced hiring discrimination (Grant et al., 2011). Participants in this study described excessive scrutiny in the workplace, driven by stigmatizing societal discourses that frame trans identities as "other" and pathological (Battle & Ashley, 2008). For example, Lerato was turned away from a job interview and advised to seek treatment,

being perceived as "sick." This underscores the hypervisibility of trans women in the workplace, where their stigmatized gender embodiment overshadows their unique skills and professional contributions. Ryland (2013, p. 2222) describes hypervisibility as "scrutiny based on perceived difference, which is usually (mis)interpreted as deviance," resulting from being identified for one's "otherness." Hypervisibility deprives individuals of agency over how they are perceived by others (Brighenti, 2007; Lewis & Simpson, 2012). It is a form of dehumanization (Allen, 2021; Petermon, 2014) that, as theorized by Buchanan and Settles (2019), renders personal identities invisible, reducing individuals to their marginalized group membership. Hypervisibility fosters hostile, unwelcoming environments for trans women, predisposing them to discrimination and alienation (del Carmen, 2023; Shabalala et al., 2023). This ultimately leads to higher underemployment rates and keeps some trapped in survival sex work (Nuttbrock, 2018). In South Africa's racially stratified society, black working-class trans women experience compounded discrimination from both gender and racial stigma, where blackness, particularly when associated with poverty and transness, becomes a layered marker of "otherness," attracting intensified scrutiny and marginalization.

Fourth, trans women's economic exclusion is also aggravated by navigating a labor system that upholds gender fundamentalist conventions, dividing work along traditional binary constructs of "man" and "woman." This gendered division has historical roots in patriarchal, gender-segregated societies that established hierarchical separations between men's and women's roles (Hennessy & Ingraham, 1997). Gendered labor divisions in contemporary culture continue to be reinforced by stereotypical views of what work is suitable for "men" and "women." While the impact of this division on the economic subordination of cis women is widely discussed, less attention is given to its effect on trans women. According to this study's findings, the gendered division of labor creates layered structural barriers for trans women, who are often seen as unfit or undeserving of roles historically reserved for "women" (Hausman, 2001). This is because gender essentialist frameworks remain committed to imposing a "male" identity on trans women, treating gender as biologically fixed and unchangeable. At the same time, trans women are excluded from roles traditionally assigned to "men" as they do not conform to performative ideals of masculinity. These combined exclusions deepen their economic marginalization within a gender-binaried labor system that limits access to fair employment. Historically, in addition to cisheteropatriarchy, South African labor structures have also been shaped by racial capitalism, systematically excluding black individuals, particularly those from poor and working-class backgrounds, from economic power. This intersection of race, class, and gender imposes compounded disadvantages on black working-class trans women, routinely excluded from employment due to racial bias, gender essentialism, and socio-economic precarity.

To contextualize these findings against the backdrop of intersectional barriers, it is essential to note that participants in this study were primarily black trans women living in townships and rural areas in post-apartheid South Africa. Therefore, in addition to navigating cisgender-dominated systems, they face socioeconomic struggles within a racially unequal socio-geographical landscape that limits their access to resources. US studies reveal that non-cis black individuals fare worse economically than their non-cis white counterparts due to intersecting racial and gender discrimination (Carpenter et al., 2022). Similarly, this study indicates that the economic marginalization of trans women is inseparable from the racialized disenfranchisement shaping their lives. Gender norms that penalize non-compliance with cisgender standards intersect with racial and class-based inequalities, exacerbating trans women's economic marginalization. Together, these multiple structural factors systematically restrict black trans women's access to the resources needed to survive and thrive in South Africa's historically challenged economic

landscape. These compounded inequalities increase vulnerability to poverty, underemployment, homelessness, survival sex, financial survivalism, and social alienation. Overall, this reveals that the economic marginalization trans women experience transcends gender subordination alone; it is also inseparably tied to the politics of blackness and class in South Africa.

However, amid these discriminatory experiences, trans women also reported significant stories of social inclusion, particularly in workplaces that emphasize gender diversity. Inclusion was primarily experienced in institutional contexts that provided them the freedom and agency to self-determine and share their stories despite competing institutional interests that sought to silence them. As Rundall and Vecchietti (2010) describe, gendered agency is the extent to which a person is free to choose and authentically express themselves as their preferred gender. Shuman (2015) argued that sharing a personal narrative that reveals experiences that might otherwise remain hidden can have a significant impact by disrupting and challenging hegemonic oppressive paradigms. Trans women's experiences of visibility and positive representation within organizations promoted gender diversity, reducing stigma, fostering a sense of belonging, increasing access to supportive networks, creating advocacy opportunities, strengthening allyship and empathy, and ultimately boosting job satisfaction and well-being. Therefore, a key part of the solution to achieving gender equality lies in increasing trans representation within organizations, giving trans voices the power to shape organizational cultures and systems.

5. Limitations

While employing a sample size of five individuals is suitable for a qualitative, critical, exploratory study, the results are not a comprehensive understanding of the real-life experiences of all South African trans women. Instead, the research sheds light on prevalent ideologies, customs, and structures that uphold the social and subsequent economic exclusion of trans women in South African society. The viewpoints of others who typically do not conform to traditional gender norms, for example, trans men, are absent from this narrative. Nonetheless, following trans* epistemological principles, this study celebrates the variety and diversity of trans perspectives, acknowledging that there is no uniform trans experience.

6. Conclusion

This study places trans women's experiences at the heart of discussions on gender economic inequality. Traditionally, these conversations have centered on cis women's struggles, often overlooking the unique economic barriers faced by trans women. Highlighting the historically silenced economic narratives of trans women uncovers new perspectives on gender-based economic injustice, promoting a more expansive, nuanced, and trans-inclusive approach to women's economic transformation.

Through this critical narrative inquiry, the high material cost of resisting societal expectations of cisness becomes evident. This study demonstrates how economic marginalization for trans women is embedded within social institutions that uphold cisgender norms, particularly in family and workplace settings. The culture within these economic institutions reinforces biology-based, binary gender classifications that render those who resist these categories vulnerable and disposable. Non-compliance with the cisnormative demands of family structures and workplaces invites scrutiny and exclusion, constraining trans women's ability to participate in and benefit from these essential economic structures. This limits their capacity to

survive and thrive within society. The material consequences of nonconformity to institutional gender expectations include homelessness, survival sex work, precarious living conditions, and restricted access to vital resources like food and healthcare, stemming from both familial displacement and blocked employment opportunities in cisgender-privileging economic structures. For black trans women in the post-apartheid South African context, this economic marginalization is further compounded by intersecting layers of systemic racism and class-based capitalist oppression, deepening their economic precarity.

The insights presented in this study enable a deconstruction of the narrow cisgender assumptions that facilitate the economic marginalization of trans identities in society. Its innovative contribution lies in mapping, exposing, and challenging the institutionalization of cisgender frameworks that privilege cisgender individuals and leave gender-diverse identities isolated and excluded. The study proposes that achieving genuine economic justice requires a radical re-engineering of institutional structures to embrace diverse expressions of gender and to reject restrictive practices that discriminate based on gender.

7. Recommendations

7.1. Practice

As Kelly (2019) argues, workplaces must foster institutional cultures that move beyond rigid gender categorizations. To advance genuine gender equity, organizational practices should challenge entrenched binaries by implementing gender-inclusive hiring processes, creating trans-affirming environments, and adopting broader understandings of gender that embrace flexibility and fluidity. Additionally, it is essential to create spaces where trans voices are empowered to shape and influence organizational culture actively.

7.2. Policy

Achieving meaningful economic inclusion requires confronting labor systems that consistently frame gender-transgressive bodies as non-normative, unintelligible, and outside the ordinary. Policies must directly address the exclusions trans individuals face, ensuring their inclusion is integral to broader gender equity efforts. Anti-discrimination laws should explicitly protect trans individuals within labor markets, safeguarding their rights and enabling access to economic opportunities by dismantling cisnormative requirements for legal gender conformity. Policies should allow individuals to identify beyond the confines of static, birth-assigned legal gender categories.

7.3. Theory

This study calls for dismantling ideologies that structure institutions in restrictive ways, enforcing rigid categories and demanding adherence to them for individuals to be seen as legitimate and credible in the workplace. Theoretical frameworks must continually critique how cisgender norms are institutionalized in employment settings. There is a need for frameworks that envision a world free from restrictive gender categorizations. Further innovative research is essential to fully account for the structural experiences of trans people, expanding gender equity discourses into inclusive frameworks that honor gender diversity in all its expressions.

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Conflict of Interests

The authors declare no conflict of interest.

Data Availability

The interview transcripts generated and analyzed during this study are not publicly available to protect participant confidentiality. However, transcripts may be made available upon reasonable request to the authors, subject to ethical and privacy considerations.

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Building Resiliency in Community Development: The Experiences of Women in Rural Communities in Ghana

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Abstract

In Ghana, women face challenges such as poverty, illiteracy, restricted legal rights, and entrenched gender roles, impeding their empowerment. Despite these barriers, they exhibit remarkable resilience, often through active engagement in community development initiatives. Previous studies highlight the importance of collective solidarity and intergenerational support in fostering resilience among Ghanaian women. However, these studies frequently apply external frameworks that conceptualize resilience as an internal attribute. This qualitative study explores the intrinsic motivations and support mechanisms that underpin resilience among Ghanaian women (N = 12) actively participating in community development efforts. Thematic analysis of interviews reveals that their resilience is greatly influenced by concerns for their children's future and strengthened by strong familial and community support networks. This research enriches our understanding of resilience by highlighting authentic sources rooted in the lived experiences of Ghanaian women, challenging conventional perceptions and emphasizing both individual and community-level factors.

Keywords

community development; gender equality; resilience; rural Ghana; women

1. Introduction

Achieving gender equality remains a global concern, marked by numerous obstacles that hinder women's progress. These barriers include disparities in rights, unequal pay, limited access to education, and pervasive physical and sexual violence (Funk & Molina, 2021; Wolf et al., 2016). In many African countries, including Ghana, these challenges are further compounded by unequal property and inheritance rights, restricted access to education, and limited participation in social, economic, and political spheres (S. Boateng & Poku,

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2019; Sassler et al., 2017). African women, particularly those in rural communities, disproportionately experience poverty and food insecurity, which are both causes and consequences of deeply entrenched gender inequalities (Addai et al., 2022; Brion & Ampah-Mensah, 2021).

The landscape for gender equality in rural communities in Africa is further complicated by cultural and religious traditions that limit women's participation in many areas of life, particularly in decision-making, formal education, and financial management (Egyir et al., 2023; Kilu et al., 2020). In Ghana, cultural norms and traditional gender roles perpetuate high rates of poverty and illiteracy among women in rural communities, who face limited political mobility, the high cost of "bride price," and the dual responsibilities of agriculture and domestic labor (Castillo et al., 2013). Although existing research emphasizes the resilience of Ghanaian women, much of it focuses on specific contexts such as gender dynamics, geographic regions, or socio-economic factors (Adusah-Poku & Takeuchi, 2019). However, there remains a gap in understanding how women in rural communities in Ghana demonstrate resilience within their distinct socio-cultural environments. Most of the literature tends to highlight personal traits like faith, optimism, and self-confidence (Adusah-Poku et al., 2021), while the broader, community-based aspects of resilience remain underexplored.

This study aims to contribute to bridging this gap by examining the resilience of women in rural Ghana who engage in a range of community development activities, such as serving in elected roles, volunteering, advocating for girls' education, and participating in civic initiatives. The research takes an "inside-out" approach to resilience, emphasizing that resilience is an inherent capacity that emerges organically from within individuals and their communities (J. A. K. Alhassan et al., 2020; Asante et al., 2020). Unlike the conventional "outside-in" approach, which views resilience as something imposed through external interventions, the "inside-out" perspective sees resilience as a dynamic process built on cultural values, social networks, and personal strengths (Agyemang et al., 2016; Ningpuanyeh & Susuman, 2016). This study is significant as it demonstrates how women in rural communities in Ghana draw on local resources and social bonds to navigate adversity, rather than relying solely on external assistance or support.

This perspective is particularly relevant for women in rural communities in Ghana, who face systemic challenges like poverty, gender inequality, and limited access to education (Chulker et al., 2023; Ngulube, 2018; Tostan, 2024). These women often rely on local knowledge, cultural practices, and personal motivation to overcome these barriers (Dwomoh et al., 2019; Kanmiki et al., 2014). By focusing on their lived experiences, this study challenges the external frameworks that view resilience as dependent on outside support, such as NGO interventions (Musah & Adutwumwaa, 2021). While projects like the 2015 Climate-Resilient Agricultural and Food Systems initiative and the 2017 Water for Resilience project have provided critical support through improved agricultural techniques and water management systems (Dary & Ustarz, 2020; Somanje et al., 2020), these efforts often overlook the adaptive strategies that women in rural communities in Ghana have already developed and the inherent characteristic arising naturally within the women themselves.

This article delves into the dynamic and complex nature of resilience among women in rural communities in Ghana, examining how cultural, intergenerational, and community factors influence their capacity to navigate and surmount obstacles. By focusing on women's perspectives and voices, this study enriches our understanding of resilience and provides unique insights that can inform more gender-inclusive community development initiatives in Ghana and potentially other similar contexts globally. The emphasis on "inside-out

resilience'" highlights the unique contribution of this study, setting it apart from previous research and underscoring its significance in the broader discourse on gender equality and community development. There is limited research into the resiliency practices of women in Ghana and other parts of Africa. Thus, this study highlights systemic and social changes that women in rural communities in Ghana have been able to bring about within their communities to cultivate community belonging, resiliency, and transformative collective action.

2. Literature Review

2.1. Introduction

This literature review examines how women in rural Ghana demonstrate resilience within the context of community development. The emphasis is on how these women embody resilience, playing vital roles in strengthening and maintaining community resilience despite various challenges. By focusing on their experiences and contributions, this review offers an understanding of the dynamic interplay between obstacles and resilience strategies, while exploring how resilience-building efforts can promote gender equality and sustainable community development.

2.2. Community Development and Resilience Building

Community development and resilience building are interrelated processes essential for achieving sustainable growth in regions facing socio-economic and environmental challenges (Amundsen, 2012; Sumardjo et al., 2023). Community development refers to efforts aimed at improving the well-being of individuals and communities through social, economic, and environmental improvements (Amundsen, 2012). Resilience building, on the other hand, enhances a community's ability to withstand, adapt to, and recover from crises while ensuring long-term sustainability (Sumardjo et al., 2023; Woodruff et al., 2018). Together, these concepts create a framework for fostering inclusive development and addressing vulnerabilities (Sumardjo et al., 2023).

Michael Ungar's ecological theory of resilience provides valuable insights into understanding resilience within a community development framework (Jacobson et al., 2018). Ungar defines resilience as the capacity of individuals and communities to navigate their way to resources that sustain their well-being, in ways that are meaningful and culturally relevant (Bergstrand et al., 2015). His theory emphasizes that resilience is not solely an individual trait but is heavily influenced by the availability of resources and the social and environmental contexts in which individuals and communities operate (Beery, 2019). This ecological perspective aligns well with community development efforts, where access to resources, social networks, and supportive systems are central to building resilience (Napawan et al., 2017).

One of the core principles of resilience building in community development is participatory engagement (Ganle et al., 2015; Kenny et al., 2014). This approach ensures that community members, particularly marginalized groups such as women, are actively involved in decision-making processes (Malapit & Quisumbing, 2015; Scott, 2013). Empowering local populations to shape the development initiatives that affect them allows for more contextually relevant solutions (Agyemang et al., 2016; Yaya et al., 2018). For instance, women in rural communities in Ghana, who are often at the forefront of community challenges,

can offer unique insights into the types of support and strategies that best address their needs and the broader needs of their communities (Dickson & Amu, 2016). By involving these women in decision-making, communities are not only addressing immediate challenges but also fostering long-term resilience (Kenny et al., 2014; Scott, 2013).

2.3. The Evolving Roles and Challenges of Rural Women in Community Development in Ghana

The roles of women in rural Ghanaian communities have evolved significantly, becoming central to the country's community development efforts (Ebenezer et al., 2020; Owusu-Manu et al., 2021). Traditionally, women were tasked with household responsibilities, including family sustenance, farming, and caregiving (D. Adom et al., 2020). However, their involvement in community development has expanded over time, and women now play a vital role in grassroots empowerment, leadership, and advocacy for social change (Baddianaah, 2023). Despite these advancements, women continue to face considerable challenges such as societal expectations, limited resources, and gendered power dynamics (Mensah, 2023; Yalley et al., 2023). Studies in disciplines such as gender studies, development economics, and rural sociology explore both the progress women in rural communities in Ghana have made and the obstacles they still encounter (F. K. Boateng & Gaulee, 2019).

Historically, rural women in Ghana have been primarily responsible for household duties such as farming and caregiving, with their roles shaped by patriarchal norms (Agbaglo et al., 2022; Ganle et al., 2014). Around 70% of rural women engage in agriculture, mainly for subsistence purposes (Angko et al., 2023), while 65% report household chores and caregiving as their main responsibilities, limiting their external opportunities (Lori et al., 2014). Despite these limitations, women in rural communities in Ghana are becoming increasingly active in decision-making and leadership, with their representation in local governance increasing from 22% in 2006 to 38% in 2016 (Adatara et al., 2020). Many women in rural communities in Ghana now lead initiatives in education, health, and environmental sustainability, with 58% of those involved in community health taking on active advocacy roles in Ghana (Ogundele et al., 2018). However, patriarchal structures continue to restrict their influence, as 60% of women report cultural norms limiting their participation in decision-making (Donkoh et al., 2022). Even among those in leadership positions, only 30% feel their contributions are adequately valued according to studies by Sialubanje et al. (2015). A feminist perspective emphasizes the need for systemic changes to fully empower women in community development in Ghana (Adatara et al., 2020).

Women in rural Ghana are not only agricultural laborers but are increasingly managing cooperatives, engaging in sustainable farming practices, and accessing new markets (Asitik & Abu, 2020; Vanderpuye et al., 2020). However, despite these advancements, they continue to face unequal access to critical resources such as land, credit, and technology (Boone & Duku, 2012; Lambrecht, 2016). Rural women in Ghana constitute approximately 70% of the agricultural workforce but own only about 10% of the land (Asitik & Abu, 2020). Moreover, studies show that only 20% of women have access to formal credit, limiting their ability to invest in more productive agricultural methods (Atta et al., 2020). Feminist economic scholars argue that these disparities reflect deep-seated structural inequalities that devalue women's economic contributions and reinforce male dominance in land ownership (Lambrecht, 2016). Addressing these imbalances through equitable redistribution of land and resources is seen as essential for enabling women to fully exercise their economic agency and contribute to sustainable development (Antwi-Agyei et al., 2015; Narh et al., 2016).

In addition to economic contributions, women in rural communities in Ghana are leaders in addressing community health and education challenges (Asamoah et al., 2014; Atuoye et al., 2015). Research highlights that they play a crucial role in advocating for maternal health, nutrition, and child education, leveraging their deep understanding of community needs (R. K. Alhassan & Nketiah-Amponsah, 2016; Zere et al., 2012). However, limited resources, inadequate healthcare infrastructure, and minimal government support pose major obstacles (Dankwah et al., 2019; Enuameh et al., 2016). The Ghana Statistical Service reports that maternal mortality rates are highest in rural areas with insufficient healthcare services (Budu, 2020; Johnson et al., 2013). While rural women often act as first responders in health crises, their efforts are hindered by a lack of access to professional training and medical resources in Ghana (Mohammed, 2023; Ogundele et al., 2018). Feminist scholars argue that rural women's caregiving roles are socially constructed and undervalued, resulting in gender inequality in the health sector (J. Alhassan & Castelli, 2019; Kunna et al., 2017).

A major challenge for rural women in Ghana is the burden of unpaid labor. Despite taking on larger roles in community development, they continue to bear household responsibilities, creating a "double burden" that strains their health and limits their capacity to lead (Ifeoma, 2023; Nanko & Teng-Zeng, 2022). According to the Ghana Statistical Service, rural women in Ghana spend significantly more time than men on unpaid care work, hindering their ability to participate fully in leadership roles (Ifeoma, 2023). Feminist theories argue that this unpaid labor must be recognized and redistributed to achieve gender equality in both domestic and public spheres (Arslan, 2020; Kotiswaran, 2023). Only through addressing these issues can rural women reach their full potential in community development (Pritlove et al., 2018; Solomon-Godeau, 2022).

2.4. Factors Supporting the Resilience of Rural Women in Community Development in Ghana

Women in rural communities in Ghana demonstrate remarkable resilience in community development, driven by a deep motivation to secure better educational and economic opportunities for their families (Twumasi et al., 2022; Zhi & Zhao, 2021). Studies from the fields of sociology, development studies, and education reveal that this strong desire for improvement fuels their engagement in initiatives that benefit not only their families but also the broader community in the long term (Wang et al., 2020; Zhi & Zhao, 2021). Within the education discipline, research highlights how education acts as a powerful tool for breaking the cycle of poverty, equipping individuals with the skills necessary to contribute meaningfully to community development and decision-making processes (Sartorius et al., 2011; Twumasi et al., 2022).

From a development studies perspective, rural women in Ghana believe that educating their children equips them with the tools to escape economic hardship and foster personal empowerment (Angko & Wulifan, 2022; Bradley et al., 2011). They also recognize that entrepreneurial training and educational programs reduce vulnerability to economic shocks and enhance the community's overall resilience (Barasa et al., 2018; Rosser et al., 2017). Studies in governance and community development indicate that individuals with education are more likely to participate in local governance and community meetings, highlighting the direct link between education and active community involvement (Budu, 2020; Sakeah et al., 2014). For rural women, education is not only a pathway to personal growth but also a means to drive broader community progress (Adatara et al., 2020; Adu et al., 2018). By advocating for education, these women are ensuring that future generations have greater opportunities, thereby strengthening the long-term resilience of their communities (Kodaman et al., 2016; Stafford et al., 2010).

The role of family support is well-documented across the disciplines of psychology, sociology, and community development (Gyan & Kpoor, 2022; Steiner & Atterton, 2014). Emotional, physical, and practical support from family members plays a critical role in enhancing both community resilience and individual resilience among women in rural communities in Ghana (Ong et al., 2018; Simkhada et al., 2008). Family support fosters positive emotions such as hope and optimism, which are crucial for managing stress and building personal resilience, particularly in the demanding environments of rural Ghana (Evans et al., 2015). Sociological research also underscores that family support, particularly in childcare, allows women to pursue income-generating activities and participate in community projects (Adatara et al., 2021; Miller & Smith, 2017). This enables them to balance household responsibilities with their contributions to local development efforts (Adjei, 2017). In times of stress or crises, family resilience helps members adapt, promoting both the collective well-being of the family and greater engagement in community life (Middendorp et al., 2013; Quintanilha et al., 2016).

In the context of community psychology, emotional satisfaction and a strong sense of belonging are critical factors supporting the resilience of women in rural communities in Ghana (Adu et al., 2018; Bohren et al., 2015). Studies in psychology and community development show that a sense of belonging significantly contributes to their involvement in community development (Agyemang et al., 2016; Balde et al., 2017). Research indicates that when women feel included and accepted within their communities, it creates a supportive environment that empowers them to overcome obstacles (Dankwah et al., 2019; Dixon et al., 2013;). This sense of belonging is crucial for building individual resilience, allowing women to navigate the complex social and economic challenges they face daily in rural Ghana (Adjei, 2017; Budu, 2020). Women with strong community ties are more likely to engage in local development initiatives and participate in resilience-building activities (Aviisah et al., 2018; Williams, 2013). These connections not only foster personal growth but also amplify their role as leaders in community development efforts (Adatara et al., 2020). The emotional fulfillment they derive from these interactions motivates them to contribute actively to the well-being of their communities, further reinforcing their resilience in the face of adversity (Gudu & Addo, 2017; Middendorp et al., 2013).

The active engagement of rural women in community development plays a critical role in strengthening their resilience in Ghana (Asitik, 2023; Bawa et al., 2017). Women's participation in community initiatives equips them with critical skills, knowledge, and social networks that enable them to adapt to changing circumstances and overcome various challenges (K. Adom & Asare-Yeboa, 2016). Additionally, their involvement in community projects enhances leadership abilities, builds social capital, and promotes collective action, all of which are essential for fostering resilience in individuals and communities (Gundewar & Chin, 2020). In rural Ghana, communal life and social support networks are central to resilience-building (Stewart et al., 2015). Women rely on these networks to share resources, knowledge, and experiences, helping them manage socio-economic challenges more effectively (Yambah et al., 2022). Studies in development sociology highlight the importance of collective support in reinforcing both individual and community resilience by fostering a sense of solidarity and shared responsibility (Wemakor, 2019). This sense of belonging motivates rural women to remain actively engaged in community development, improving both their own lives and the resilience of their communities (Appiah et al., 2021).

3. Theoretical Framework

This article is grounded in the resiliency theory, specifically drawing upon Ungar's ecological theory of resilience, with emphasis on the "inside-out" perspective. Resilience theories fundamentally capture the adaptability to and triumph over adversity by assessing a range of traits, both internal and external to the individual. While historical explorations of resilience span diverse domains and disciplines, prevailing definitions within resilience theories often emphasize individual characteristics as primary determinants, acknowledging the significance of external factors but assigning them a secondary role. In the realm of social sciences, resilience is commonly defined concerning the successful navigation of challenging experiences and the resultant personal growth. In contrast to deficit-focused approaches, resilience theory adopts a strengths-based and positive perspective, elucidating the factors that contribute to overcoming adversity (Ledesma, 2014). Resilience theories traditionally focus on individual adaptability and triumph over adversity, often assessing internal traits such as optimism, problem-solving abilities, and determination (Ledesma, 2014). However, Ungar's ecological theory expands this view by emphasizing that resilience emerges not just from individual traits but from the interaction between individuals and their surrounding social, cultural, and environmental contexts. Ungar's ecological theory of resilience extends beyond individual traits, recognizing both internal and external factors as pivotal predictors of resilience (Ledesma, 2014).

Drawing upon this "inside-out" perspective or model, Ungar posits that the social, cultural, and intrapersonal traits contextualizing an individual's experience play interweaving roles in the development and application of resilience. He defines resilience as "a set of behaviors over time that reflect the interactions between individuals and their environments, in particular the opportunities for personal growth that are available and accessible" (Ungar, 2012 p. 14; see also Ungar, 2018, 2021). Ungar conceptualizes resilience as an active process developed through experience, rather than a pre-existing trait, emphasizing the dynamic interplay between an individual's ability to engage with both internal and external resources and the accessibility and cultural significance of external resources. This synthesis of personal agency with social and systemic support characterizes resilience as a negotiation between an individual and their "social ecology" (Ungar, 2012, p. 17, 2018, 2021).

This "inside-out" perspective is particularly relevant to the study of rural women's resilience in Ghana because it shifts the focus from external interventions (such as aid or formal support systems) to the inherent strengths and resources already present within communities. In rural Ghana, where systemic challenges like poverty, gender inequality, and limited access to education persist, women often rely on internal community-based resources—such as local knowledge, social networks, and cultural values—to build and sustain resilience (Agyemang et al., 2016; J. A. K. Alhassan et al., 2020). By highlighting this internal capacity, the "inside-out" approach emphasizes that resilience is not solely an outcome of external support but is deeply rooted in women's ability to draw on their own cultural and social capital to navigate challenges.

Focusing on women's resilience in rural Ghana allows for an exploration of how these women actively engage in community development, overcoming obstacles with the help of family, community structures, and intergenerational cultural practices. This is critical for understanding their role in fostering resilience within the broader socio-ecological system. Their participation in local initiatives, advocacy for girls' education, and leadership in community projects highlight the ways in which resilience emerges organically from within, rather than being externally imposed (Dwomoh et al., 2019; Ningpuanyeh & Susuman, 2016).

By adopting Ungar's "inside-out" perspective, this study aims to contribute to a more comprehensive understanding of resilience in rural settings, challenging the dominant "outside-in" narrative that views resilience as the result of external interventions. Instead, it underscores the importance of recognizing and enhancing the intrinsic capacities of women and communities in Ghana for sustainable development.

4. Research Methodology

This qualitative study aimed to honour subjectivity, and constructivism recognizing the inability of researchers to fully separate themselves from their subjective lens which shapes the results of their research (Amineh & Asl, 2015; Schwandt, 1994; White, & Davis, 2023). According to Moran (2000) the subjective view of experience [is] a necessary part of any full understanding of the nature of knowledge. We prioritized the subjective lived experience of the research participants above normative cultural understandings of the meaning of their experiences (Moran, 2000). This approach allowed us to understand the individual meanings given to experiences of resilience within community development by women in Ghana. Twelve women (N = 12) were recruited from three rural communities in Ghana: Bolni (Northern Region), Yawhimakrom (Brong Ahafo Region), and Mayera Faase (Greater Accra Region). These communities were selected for their regional diversity, allowing the study to capture a range of experiences related to community development. Bolni represents the predominantly rural Northern Region, Yawhimakrom focuses on agriculture in the Brong Ahafo Region, and Mayera Faase provides insights into the peri-urban dynamics of the Greater Accra Region. Participants, aged 25 to 50, were involved in various community development activities. This sample included five women working as officials in NGOs and community-based organizations and seven women actively engaged in community efforts. Some participants were married, others were single, but all were mothers, enriching their perspectives on balancing family and community responsibilities.

To mitigate biases and power dynamics, peer interviewers who shared cultural and linguistic backgrounds with the participants were selected to conduct the interviews. These peer interviewers underwent a four-day training program focused on building interview skills, ethics, and sensitivity toward the participants' lived experiences. This approach minimized cultural barriers, fostering an open and trusting dialogue. In-depth interviews were conducted in local dialects (Likpakpaln, Twi, and Ga), using an open-ended interview guide designed to elicit detailed interpretations of the participants' experiences. All interviews were conducted after obtaining explicit verbal consent, adhering to Wilfrid Laurier University's Research Ethics guidelines. Anonymization of responses was ensured during transcription and analysis to protect participant confidentiality. The interviews were translated into English and transcribed for analysis. We employed thematic analysis, a method particularly suitable for identifying patterns and themes in qualitative data (Braun & Clarke, 2006). This approach allowed us to explore how rural women in Ghana perceive and navigate resilience within the context of community development. Thematic analysis involved reading the transcriptions multiple times to become familiar with the data, followed by creating preliminary codes to categorize recurring topics. This process was iterative, as we revisited the data to identify overlooked patterns and refine our initial codes. Ultimately, we developed a final set of themes that captured the women's experiences, ensuring a comprehensive interpretation of their resilience in community development. By acknowledging our own positionality as researchers, we approached the data with openness, allowing the voices of women in rural communities in Ghana to drive the narrative of resilience and their active roles in community development.

5. Results

This study sought to highlight the intrinsic resilience of Ghanaian women participating in community development activities, examining the specific factors supporting and motivating women's resilience. Qualitative analyses revealed several supporting and motivating factors behind women's resilience, including concern for their children's future, familial support, social support, and punishment for non-involvement.

5.1. Future of Their Children

Women in rural Ghana strongly believe their children should have a better standard of living. Motivated by this, they see their children's future as a key driver of their resilience. The desire to provide educational opportunities emerged as a prominent theme, leading participants to engage in community development activities to ensure access to education and healthcare. This shift from traditional practices reflects a progressive approach aimed at empowerment through education. For instance, a participant emphasized:

> When I look back, the positive thing that makes me continue to be part of the process is the need to help our children. We didn't have girls who were educated. We used to prepare them for marriage and as a result they couldn't speak or understand English but now we have stopped this practice. (Queen mother 1).

Another participant echoed this sentiment, explaining that "the future of my children pushes me to be part of any development activities we do in this community…when there is light, children can study well" (Diana). These narratives underscored the pivotal role the future of their children played in motivating their resilience.

5.2. Breaking the Cycle of Poverty and Ignorance

The study found that women's desire to break the cycle of ignorance and poverty motivates them to engage in community development despite challenges. They recognize that altering the educational pathway for girls can break this cycle, highlighting new possibilities for empowerment and development. This transformative vision positions education as central to fostering enlightenment and progress in the community. This is supported by a respondent who indicated: "We want to…educate them so that one day they will feed us. We don't want them to also remain in our darkness" (Queen mother 1).

The above statement further highlights that participating in community development, despite barriers, offers girls educational opportunities, preparing them to contribute economically and socially. It underscores the belief that investing in girls' education leads to personal empowerment and supports the community's economic sustainability.

5.3. Familial Support

Familial support emerged as a crucial protective factor, boosting women's resilience in community development processes. The physical and emotional comfort provided by family members played a significant role in fostering resilience. While some women received strong support, others faced occasional discouragement, highlighting the complex interplay between family dynamics and women's resilience.

For example, one participant noted the significant role her family played in supporting her, stating: “My family has been very supportive. Their support and encouragement have been very helpful to me in this whole election issues” (Mary). Another respondent echoed this, indicating:

> There is one of my brothers who lectures at GIMPA [Ghana Institute of Management and Public Administration] He helps me in proposal writing, petition and even just yesterday, he spent about six hours writing a petition for me...in most times he assists me in cooking, washing, and taking care of the children. Even as I am here, I have been away for three days, and my husband is home to take care of the children while am away. (Afia)

The study further found that family-supported community engagement and networking boost rural women’s resilience and influence in community projects. This extended support network is vital for accessing resources and improving community infrastructure. By staying connected and proactive, rural women enhance their visibility and impact, fostering resilience in themselves and their communities. This is supported by a respondent: “Even yesterday he called that urban roads are around and looking for where to do culvert and I asked him to assist them, which he did” (Afia). However, challenges were also acknowledged, with Yaa stating: “My parents think it is a difficult work, so I should stop and do better work for a living or else I will continue to work for nothing.”

Another participant expressed: “Eeiiii but as for my parents, they want me to stop this assembly woman [a representative at the local government level] work especially with the current difficulties I am going through” (Afia)

The study highlights the complex dynamics of familial support for women in community development. Families’ ambivalent support fluctuates between pride in women’s public successes and expectations of domestic roles, reflecting societal norms. Success boosts women’s social standing and self-esteem, essential for resilience, but balancing these expectations with home duties can cause stress and conflict, affecting their psychological resilience. A respondent indicated that:

> At times they [the family] are happy....But when am going through difficulties they discourage me. Oooh as for my husband, he is also 50–50 because at times I have to leave my responsibilities at home and lobby for my electoral area which sometimes he doesn’t like but after I succeed in bringing any development to the area, they all become happy and he says, ‘this is my wife’ but when I neglect my duties and he gets angry. (Afia)

5.4. Participation in Community Development Activities

The study found that active participation in community development builds resilience for rural women in Ghana. This involvement provides purpose, strengthens community bonds, and allows women to influence and achieve a sense of belonging. These experiences foster a supportive network and enhance social capital, crucial for overcoming challenges. In line with this, one participant indicated:

> The first time I took part in activities in this community was when we were building our clinic and also cleaning our cemetery, after these activities, I have always taken part in some of these activities organised in this community. (Diana)

5.5. Collective/Social Support and Communal Life

The strong emphasis on communal life in Ghanaian culture is evident in participants' experiences. Community development activities address social issues and provide personal support. Sharing and supportive exchanges during these activities are crucial for fostering resilience among these rural women. This network provides practical and emotional resources to cope with challenges, enhancing community belonging and self-efficacy among the women. Through these interactions, women contribute to their community and reinforce their capacity to withstand and adapt to adversities. In line with this, one participant explained:

> The first one was really interesting. We learnt a lot, share our problems with others while we work, and help each other through advice. All this pushes me to attend communal labour. (Diana)

Another participant re-echoed this, saying: "I have love for the community and believe that when I participate in activities, any time I have a problem, people will be willing to help me out so I go out to participate in most activities" (Mercy).

5.6. Emotional Fulfillment and Community Belonging

The study found that integration and acceptance are crucial for rural women's mental health and well-being, acting as an emotional reservoir during challenges. Community belonging and participation in communal activities strengthen emotional ties and purpose, enhancing personal resilience and helping women handle adversities more effectively. This is highlighted by one of the respondents who indicated that "the feeling of being part of a community and having all these people to fall on whenever you have a problem makes me feel fulfilled whenever I attend communal labour" (Ama).

The findings reveal that Ghanaian rural women's resilience is supported by aspirations for their children's future and strong community and familial support. The desire to secure better opportunities for their children motivates women to engage in community projects, while family and community support provides emotional comfort and enhances their capacity to overcome challenges. This resilience is sustained by a blend of individual aspirations and collective support, showcasing a multifaceted approach to overcoming adversity and fostering sustainable community development.

6. Discussion

This discussion draws on the results of the study and the literature review to explore how specific factors contribute to the resilience of rural women in community development in Ghana. Using Michael Ungar's ecological theory of resilience as a framework, the discussion focuses on six key themes: the future of their children, breaking the cycle of poverty and ignorance, familial support, participation in community development activities, collective/social support and communal life, and emotional fulfillment and community belonging. These themes are analyzed in relation to how they strengthen the resilience of women in rural Ghanaian communities.

One of the central motivations driving the resilience of rural women in Ghana is their desire to secure a better future for their children. The study reveals that these women are deeply committed to ensuring their children,

particularly their daughters, have access to education. This shift marks a significant departure from traditional practices that prepared girls for early marriage, which limited their future opportunities. The prioritization of education for girls is seen as a transformative approach to breaking down barriers and empowering the next generation.

This finding aligns with feminist perspectives that emphasize the critical role of education in challenging patriarchal norms and promoting gender equality (Adatara et al., 2020; Adu et al., 2018). As rural women shift from a focus on preparing girls for marriage to prioritizing their education, they are not only enhancing their children's opportunities but also reshaping societal expectations. Education is viewed as a tool for empowerment, equipping girls with the skills and knowledge necessary to participate in decision-making processes and contribute to broader community development (Bradley et al., 2011; Budu, 2020).

Ungar's ecological theory emphasizes that resilience is shaped by the ability to access culturally relevant resources that support well-being (Ungar, 2012). In this context, education serves as a key resource, enabling rural women to foster resilience in themselves and their children. By investing in their daughters' education, these women are building a foundation for long-term resilience, ensuring that the next generation is better equipped to navigate socio-economic challenges and take on leadership roles within their communities. This forward-looking approach reflects a growing recognition among rural women that empowering girls through education will not only improve their individual prospects but also contribute to the sustainability of their communities.

The desire to break the cycle of poverty and ignorance emerged as another key motivator behind rural women's engagement in community development in Ghana. Participants expressed a commitment to improving their children's educational outcomes as a means of overcoming economic hardship. Historically, limited access to education has perpetuated economic hardships and reinforced traditional gender roles that hindered women's full participation in society. By prioritizing education for their children, especially daughters, rural women are working to dismantle these barriers and open pathways to economic empowerment and social progress.

From an economic perspective, this focus on education is closely tied to feminist economic theories that highlight the importance of addressing gendered disparities in access to education and economic opportunities (Atta et al., 2020; Narh et al., 2016). Educating girls equips them with the knowledge and skills necessary to overcome socio-economic barriers, which not only fosters personal empowerment but also contributes to household income generation and community economic development (Angko & Wulifan, 2022; Sartorius et al., 2011). As these educated girls grow into women, they often gain access to higher-paying jobs, entrepreneurial opportunities, and financial autonomy, all of which contribute to breaking the cycle of poverty that has traditionally limited rural women's economic participation.

By advocating for education, rural women are not only addressing immediate needs but are also laying the foundation for long-term economic growth and resilience in their communities. This shift ensures that future generations can escape the economic constraints that have shaped their own lives, ultimately leading to greater economic equity and the strengthening of community development initiatives.

Again, familial support emerged as a critical factor in fostering the resilience of rural women in Ghana. The study found that the emotional, physical, and practical assistance provided by family members,

particularly spouses and siblings, played a significant role in enabling women to balance their domestic responsibilities with their community development activities. This finding resonates with the broader literature, which highlights the importance of familial networks in supporting resilience, particularly in marginalized communities (Gyan & Kpoor, 2022; Steiner & Atterton, 2014).

Ungar's ecological theory emphasizes that resilience is not an individual trait but is shaped by the availability of supportive resources within one's environment (Ungar, 2012). For rural women in Ghana, the support they receive from their families allows them to navigate the complexities of their dual roles in both the domestic and public spheres. Family members often take on household chores or childcare duties, freeing women to participate more fully in leadership and decision-making processes within their communities (Adjei, 2017). This practical assistance enhances women's capacity to contribute to community development without being overwhelmed by the burdens of unpaid domestic labor, which is a common challenge faced by women in rural areas (Nanko & Teng-Zeng, 2022).

However, the study also revealed the complex dynamics of familial support, where societal expectations sometimes conflicted with women's ambitions. Some family members expressed concerns about the challenges associated with public leadership roles, reflecting broader societal norms that continue to place significant domestic burdens on women (Boone & Duku, 2012). These tensions highlight the need for a cultural shift that recognizes the value of women's contributions to both the domestic and public spheres, as feminist scholars argue that achieving true gender equality requires addressing these deeply embedded expectations (Kotiswaran, 2023).

Furthermore, familial support was identified as a crucial factor in enhancing the resilience of rural women engaged in community development in Ghana. The study found that emotional, physical, and practical support from family members, particularly in managing domestic responsibilities, allowed women to participate more fully in community development activities. This finding echoes earlier research that highlights the importance of family support in fostering resilience, particularly in rural settings where women often juggle multiple roles (Evans et al., 2015; Gyan & Kpoor, 2022).

Ungar's ecological theory emphasizes the role of social networks and supportive environments in fostering resilience (Ungar, 2012). In the case of rural Ghanaian women, the study found that familial support acts as a protective factor, enabling them to balance their domestic responsibilities with their public roles in community development. This dynamic is particularly important in rural settings, where women often face a "double burden" of unpaid labor at home and leadership roles in community projects (Miller & Smith, 2017). The study revealed that family support, particularly in childcare and household duties, allows women to pursue leadership opportunities and contribute to the resilience of their communities.

However, the study also highlighted the complexity of familial support, with some participants reporting ambivalence or discouragement from family members regarding their community involvement. This reflects the broader societal expectations that rural women must navigate—balancing traditional gender roles with their expanding public responsibilities. Feminist scholars have argued that these conflicting expectations can undermine women's resilience, particularly when they are not fully supported in their efforts to engage in community leadership (Kotiswaran, 2023). Despite these challenges, the support these women received from their families—whether emotional, practical, or financial—was essential in enhancing their resilience and enabling them to contribute to the development of their communities.

Moreover, the study found that the active participation of women in rural communities in community development initiatives significantly enhances their resilience in Ghana. By engaging in initiatives such as building clinics, organizing communal labor, and advocating for better healthcare, these women acquire practical skills and leadership abilities that enable them to adapt to changing circumstances. These activities provide women with the opportunity to contribute meaningfully to their communities, fostering a sense of agency and empowerment. This finding aligns with existing research that suggests active involvement in community projects fosters a sense of purpose and belonging, which is critical for resilience-building (Agyemang et al., 2016; Gundewar & Chin, 2020).

According to Ungar's ecological theory, participation in community activities provides women with access to the social networks and resources necessary to navigate challenges and adapt to changing circumstances (Ungar, 2012). In rural Ghana, where women are increasingly taking on leadership roles in education, health, and environmental sustainability, their active engagement in community development initiatives has a profound impact on their individual resilience and the collective resilience of their communities as emphasized by K. Adom and Asare-Yeboa (2016). This is supported by the literature, which highlights how women's participation in community projects enhances their social capital and promotes collective action, both of which are essential for fostering long-term resilience (Stewart et al., 2015; Yambah et al., 2022).

By participating in community development, women also challenge traditional gender roles and assert their agency in public spaces. This shift not only empowers them individually but also contributes to the broader goal of gender equality in rural communities as noted by Asitik and Abu (2020). The findings suggest that through their involvement in community initiatives, women in rural Ghana are redefining their roles and actively contributing to the resilience-building efforts that are vital for sustainable community development.

In addition, the study highlighted the importance of collective social support and communal life in enhancing the resilience of rural women. Ghanaian culture places a strong emphasis on communal life, and this sense of community was evident in the women's participation in development activities. Research supports the idea that social networks and communal engagement are crucial for resilience-building, particularly in rural settings where resources are often limited (Agyemang et al., 2016; Stewart et al., 2015).

Women in the study reported that their involvement in community activities provided them with practical and emotional support, helping them navigate the challenges they faced. This finding is consistent with Ungar's ecological theory, which emphasizes the role of social structures in providing access to the resources that sustain well-being (Beery, 2019). By participating in communal labor and other community projects, women in rural Ghana were able to build strong social bonds, which in turn reinforced their resilience. The literature indicates that collective support and solidarity are essential for overcoming socio-economic challenges, as they provide a sense of shared responsibility and mutual assistance (Wemakor, 2019).

In support of this, feminist scholars argue that collective action is central to challenging the power dynamics that have historically marginalized women in rural communities in Ghana (Lambrecht, 2016). The study's findings suggest that women's participation in community development not only enhances their individual resilience but also strengthens the resilience of the entire community. By working together and supporting one another, rural women in Ghana can pool resources, share knowledge, and collectively address the challenges they face.

Finally, the study found that emotional fulfillment and a strong sense of community belonging were critical factors in enhancing the resilience of rural women. Participants reported that feeling accepted and integrated within their communities provided them with a sense of emotional security and satisfaction, which bolstered their ability to cope with adversity. This finding is supported by research in community psychology, which highlights the importance of belonging and social connectedness for resilience-building (Ong et al., 2018).

Ungar's ecological theory underscores that resilience is fostered not only through individual traits but also through meaningful connections within one's social environment (Ungar, 2012). The study revealed that women who felt a strong sense of belonging were more likely to participate in local development initiatives and contribute to the collective well-being of their communities. This sense of belonging also provided women with the emotional strength needed to navigate the socio-economic challenges they faced in rural Ghana as emphasized by Adu et al. (2018) and Budu (2020).

In addition to emotional support, the literature suggests that community belonging fosters social capital, which is essential for resilience-building in rural settings (Adatara et al., 2020). Women who feel connected to their communities are more likely to engage in community projects, advocate for social change, and take on leadership roles. This emotional connection not only enhances their resilience but also contributes to the overall resilience of the community, as women play a central role in fostering collective well-being.

7. Conclusion

This study underscores the importance of fostering resilience among women in rural Ghana by adopting an "inside-out" approach that emphasizes intrinsic capacities over external interventions. Through the lens of Ungar's ecological theory of resilience, the research illustrates how personal agency, familial and communal support, cultural values, and active participation in community development work together to enable these women to navigate adversity and contribute to the well-being of their communities. This perspective challenges traditional views that rely heavily on external aid and interventions, instead focusing on the dynamic interplay between individual strengths and the supportive social and cultural ecosystems within which these women operate.

The study uncovered key factors, such as the desire to secure a better future for their children, familial and communal support, and active participation in community development, which drive the resilience of these women. One of the key practical implications of this study is the need for development initiatives to adopt community-driven, gender-sensitive strategies that recognize and enhance the existing strengths of rural women. Policymakers and development practitioners should move beyond a deficit model of resilience that views these women as passive recipients of aid. Instead, they should engage women as active participants and leaders in development efforts, leveraging their deep-rooted community ties, knowledge of local challenges, and intrinsic motivation to improve their families' futures. By incorporating local knowledge, cultural practices, and the strong social networks that already exist within these communities, development programs can be more sustainable and effective in addressing both immediate needs and long-term goals.

Moreover, collective and social support networks are fundamental to the resilience of these women. Development programs should aim to strengthen these networks, fostering greater community participation and collaboration. By promoting collective action and enhancing women's roles in decision-making and

leadership, communities can not only become more resilient but also more equitable, as women's voices and contributions are recognized and amplified.

In terms of long-term impact, this study suggests that future research and development projects should examine how external interventions can complement, rather than overshadow, the intrinsic resilience-building mechanisms that exist within these communities. Specifically, there is a need to explore how systemic changes such as climate adaptation, economic shifts, or political reforms can align with and reinforce the inherent strengths of rural women. Understanding how these women's resilience evolves in response to both external pressures and internal resources will be crucial for designing interventions that are both culturally appropriate and capable of driving sustainable development.

Ultimately, the findings of this study offer valuable insights not only for academic research but also for the practical design of community development and gender equality initiatives. By shifting the focus from external aid to empowering women through their own capacities and networks, policymakers and practitioners can create more sustainable and impactful solutions. Recognizing the complex social, cultural, and familial dynamics at play, and incorporating them into development strategies, will be key to ensuring that women in rural Ghana and similar contexts can continue to build resilience and drive positive change within their communities.

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Conflict of Interests

The authors declare no conflict of interests.

Data Availability

The data supporting the findings of this study are not publicly available due to the confidentiality agreement we had with the participants.

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The Emotional Costs of Solidarity: How Refugees and Volunteers Manage Emotions in the Integration Process

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Abstract

While emerging right-wing populist voices are calling to prevent the arrival of refugees and their integration, volunteers perform solidarity by performing activities to support refugee integration. Most studies on these forms of solidarity in diversity focus on the quality and effectiveness of the activities. The emotional labor involved has received limited attention. To consider this emotional labor in more detail, we use Arlie Hochschild's concept of feeling and framing rules and relate these rules to prevailing citizenship regimes, distinguishing between the self-reliance regime and the community regime. Based on in-depth ethnographic research of volunteer solidarity work in a deprived urban neighborhood and a middle-class commuter town in the Netherlands, we show that volunteers are strongly aligned with the community regime, which involves navigating a multitude of feeling rules they struggle with. Refugees are more aligned with the self-reliance regime, which also gives way to emotional struggles. We argue that to promote solidarity in diversity, scholars and policymakers should pay more attention to these different forms of emotional labor and the painful and joyful emotions involved.

Keywords

citizenship regimes; emotions; feeling and framing rules; refugee integration; volunteers

1. Introduction

There has been a continuous political debate about refugee policy in Western welfare states over the last decades. Refugee policy and refugee integration are politically contested, sensitive topics; right-wing politicians have stirred up fear and anger about "waves" of refugees and (illegal) immigrants that would far

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exceed what European countries would be able to absorb. Some far-right politicians have promised to put an end to immigration or to set a maximum on the number of migrants entitled to legal status. Shelters for asylum seekers have been the subject of local protest, hostility, and hatred (for an overview see Da Silva Rebelo et al., 2018). Meanwhile, local groups of citizens often organize welcoming events and perform volunteer work to support refugees in learning the language and, once granted the right to stay, find their way in their new surroundings. The present study was prompted by this political and societal debate on the arrival of refugees. It explores the emotions of "welcomers" and refugees who perform solidarity work in a diverse society, to enrich this side of the debate with empirical data. We will look at the "emotional labor" involved in solidarity work, thus contributing to the literature on the sociology of emotions (SoE). Our research question is: What emotional labor is involved in the solidarity work that occurs between refugees and the volunteers who help them?

The term "refugees" refers to people with a refugee background (as one of their identities) who have been given a residence permit and who recently arrived in the neighborhood or town studied in this article. The term "volunteers" relates to various groups: some volunteers were recruited by, and collaborate with, social services organizations, and others are active in citizens' initiatives focused on the integration of refugees. It must be noted that some of these volunteers are former refugees, who arrived in earlier years and are now active as volunteers. Occasionally, we refer to "established citizens," that is, other citizens living in the neighborhood who are neither refugees nor volunteers.

In this article we define integration as a dynamic and two-way process of change that involves the forming of relationships across people with multiple and overlapping identities (Strang & Ager, 2010), placing demands on both the host society and the individuals or communities affected (ECRE, 2002; Farrugia, 2009; Hollands, 2006). We focus on perspectives and experiences in the integration process of both volunteers and refugees while both try to give shape to an inclusive society and to live together in a pluralistic, diverse society.

In the next section, we explain our theoretical framework, followed by a section on methods and the research locations. Then we present our findings. In the conclusion, we answer our research question and discuss the implications of our findings for the literature and Dutch integration policy.

2. Theory

2.1. Sociology of Emotions

In all social phenomena emotions are present and play a fundamental role. From a sociological perspective, emotions are shaped by social processes, and conversely, emotions play a fundamental role in social dynamics (Bericat, 2016). SoE has evolved into a critical, reflexive, and interdisciplinary field from the late 1970s onward, entailing many theoretical traditions (Olson et al., 2017).

In SoE, emotions are usually defined as the bodily manifestation of the importance that an event in the natural or social world has for a subject. Emotions are relatively "brief, positive or negative evaluative states, which have physiological, neurological and cognitive elements" (Lawler, 1999, p. 219). SoE tends to focus on cognitive aspects and how they are influenced by social processes. Scholars agree that emotions are complex and emotional experiences depend on many factors, e.g., the subject's expectations in the situation,

how an act is evaluated (un)consciously, the relative power and dependency of other actors, and the type of exchange. Various theoretical reviews in this field conclude that more substantive theories on concrete phenomena and emotional processes in various social contexts are needed to push the field further ahead (Bericat, 2016; Olson et al., 2017). This article tries to do this concerning the emotions of volunteers and refugees during the process of integration into the receiving society. We build on the work of the American sociologist Arlie Hochschild, a pioneer in the field of SoE. People have to navigate their emotions and the emotions of others, a phenomenon for which Hochschild introduced the concept of emotional labor, defining it as “the management of feeling to create a publicly observable facial and bodily display” (Hochschild, 1983, p. 7). The concept can be used to understand emotions themselves as well as their effects on people’s psychological well-being and attitudes (Wharton, 2009).

2.2. Framing and Feeling Rules

To better understand emotional labor, Hochschild (2003) developed the concepts of framing and feeling rules. As a feminist Marxist in the 1970s, she wanted to understand why women who, from an outsider’s perspective, could be argued to be oppressed, did not protest their oppression and did not even see themselves as oppressed. How could this be explained without taking refuge in the Marxist argument of false consciousness: that they did not properly understand their own situation? As a sociologist, she wanted to take them more seriously (Tonkens, 2012).

Building on the work of sociologist Goffman (1974), Hochschild developed the concepts of emotional labor, framing, and feeling rules to answer these questions. People do not understand themselves in relation to abstract concepts like gender inequality or human rights. Instead, they understand their situation comparatively: compared with, for example, their past or the situation of others close by (Tonkens, 2012). By using such comparisons, they frame their situation. People use culturally available argumentations for this framing, which Hochschild calls framing rules: rules concerning how to interpret the situation you are in. The concept of framing rules fits with the now well-developed field of framing theory in many academic subfields including social theory (Benford & Snow, 2000; Van Hulst & Yanow, 2014).

Hochschild adds that social situations include emotions and emotional labor from all involved. She connects framing to emotions through the concept of “feeling rules”: socially shared, sometimes latent feeling conventions that define “what people think they should or should not feel, or what they would like to feel in specific circumstances” (Hochschild, 2003, p. 82). In our study, feeling rules concern feelings refugees and volunteers think they should or should not have about themselves and each other.

2.3. Citizenship Regimes

As to the sources of framing and feeling rules, Hochschild herself only pointed to macro-sociological processes such as globalization. Globalization is of course a driver of the influx of refugees but it does not shape how refugees and established citizens respond to this influx in particular settings. Following Tonkens (2012), we argue that this response is shaped by citizenship regimes: “the institutional arrangements, rules and understandings, and power relations that guide and shape current policy decisions, state expenditures, framing rules, feeling rules and claims-making by citizens” (Tonkens, 2012, p. 201).

Emotions and emotional labor are shaped by citizenship regimes. Concerning refugee integration, two citizenship regimes can be discerned in the Netherlands. The first, predominant regime emphasizes refugees' self-reliance: being able to support themselves in society. This implies refugees have the skills, capacity, and agency to stand on their own as independent individuals (Easton-Calabria & Omata, 2018; Omata, 2023) and that integration is largely their responsibility. In the Netherlands, the self-reliance regime has been adopted and internalized as a "normal" premise (Omlo, 2011). This is reflected in the Dutch integration policy that states that refugees should actively participate and find work as soon as possible (Coalition Agreement Schoof, 2024; Ministry of Social Affairs and Employment, 2018). This regime is also legally embedded in the Social Support Act (van der Ham et al., 2018).

Locally, however, there are also pockets of a second regime in place, which can be called a community regime (Tonkens, 2012). We define a community as people with social ties sharing an identity and a social system, interacting and supporting each other (Cobigo et al., 2016; Hardcastle et al., 2004). This involves social integration and the creation of social capital: "social networks and the associated norms of reciprocity and trustworthiness" (Putnam, 2007, p. 137). The community regime is based on the idea that communities should care for their needy members. A predominant feeling rule in this regime is that people "should feel happy and proud to be active in the community and to provide informal care" (Tonkens, 2012, p. 202).

2.4. Volunteers and Emotions

Previous studies have found various emotions among volunteers supporting refugees such as pity, empathy, anger, and shame (e.g., Behnia, 2007; Hamann & Karakayali, 2016; Landmann et al., 2023; Sawtell et al., 2010; Simsa, 2017). Emotions can be a motivating factor for volunteers to take responsibility. Doidge and Sandri (2019) performed participatory observation in an informal refugee camp in Calais and found that empathy fosters connections with other volunteers and refugees, and helps them understand and make sense of the situation. Various other studies focus on emotions and the emotional commitment of volunteers (Boezeman & Ellemers, 2007; O'Toole & Grey, 2016; Ward & Greene, 2018). A few studies elaborate on the emotional labor involved in volunteering. Eliasoph (1997) did fieldwork among volunteers, activists, and recreation groups. She shows how much emotional labor is needed to "muster unequivocally upbeat feelings" (p. 621). It seems difficult for volunteers to talk about their worries and emotions publicly. As a rule, they try to adopt a happy tone and look on the bright side to preserve an inner sense of well-being (Eliasoph, 1997; Eliasoph & Lichterman, 2003). Other research shows how volunteers desperately try to avoid emotional and moral dilemmas. Based on an analysis of 72 in-depth interviews with volunteers, Maestri and Monforte (2020) show how volunteers working with refugees developed coping mechanisms, such as focusing on practical tasks, to avoid making judgments in complex situations. This article aims to deepen our insights into the emotional labor of volunteers and connect these with the citizenship regimes in place.

2.5. Migrants and Emotions

Previous studies also looked at the emotions of refugees. An extensive literature review on the emotions of forced migrants by Mahmud (2021) found that studies tend to focus on the impact of the context of migration, on emotions during a specific stage of the journey, on emotions, values, and traditions that forced migrants bring with them to the destination country. Scholars also focus on issues during the integration process such as safety, discrimination, and health, that can be related to emotions (Akar & Erdoğdu, 2019;

Farrugia, 2009; Gürer, 2019) and migrants' struggle for connectedness, nostalgia for the homeland, or frustration in securing employment (Paudyal et al., 2021; Walther et al., 2021). These studies acknowledge that emotions come into play, but hardly discuss how migrants cope with them. In this article, we try to dive deeper into how both refugees and volunteers cope with their emotions by analyzing their framing and feeling rules and emotional labor.

3. Research Setting and Methods

3.1. Broader Research Aim and Context

The data for this article are part of a broader study on how volunteers foster the integration of refugees in two different sociologically composed areas in the Netherlands. The research took place in two urban areas in the Netherlands, which we have anonymized as Riverfield and Greentown. Riverfield is an ethnically diverse disadvantaged neighborhood, hosting 34.560 inhabitants of 170 nationalities, mostly with a low socio-economic status. Greentown is a middle-income commuter town near that same city counting 50.301 inhabitants, mostly white and with middle or high socio-economic status. This is based on statistics showing how municipalities and neighborhoods score in relation to each other, based on data on welfare, education level, and labor market participation (Statistics Netherlands, 2024).

Relatively many refugees were placed in both areas between 2016 and 2018, compared to the two decades before. In 2021, 920 refugees lived in Greentown and 2,450 refugees lived in Riverfield, respectively 1.8% and 7.2% of the total population (KIS Wijkmonitor, 2021). There are more citizen initiatives per resident active in Riverfield than in Greentown and also more than the national average, based on an estimation by local social workers. In Greentown, churches play a central role in community life. The selection of the two areas draws on the debate in the scientific literature (Kindler et al., 2015) on how the composition of a neighborhood affects the integration process. The focus on community is particularly present in the integration policy of Riverfield, reflected in the frequently formulated motto "We Do It Together," which aims to highlight the importance of an inclusive city, with opportunities to socialize. In Greentown, the importance of volunteer commitment and the necessity of cooperation with (in)formal stakeholders is stressed. A brief overview of the main characteristics of both neighborhoods is shown in Table 1.

Table 1. Refugees, active citizens, and socioeconomic status per area.

	Inhabitants (2021)	Refugees (2021)	Initiatives dealing with refugees (estimation by social worker)	Socio-economic status (2021)
Riverfield	34.560	2450	*60*	–0,43
Greentown	50.301	920	*20*	0,30
The surrounding urban region	710.531	9260	*250*	0,04

3.2. Interviews, Observations, and Focus Groups

In each area, we conducted in-depth interviews with fifteen refugees and five volunteers. In the interviews with refugees, we focused on their daily practices and experiences. What does your day look like, what do

you run into, how do you engage with organizations? We asked volunteers to talk in detail about their activities: Why they carried them out, how their relationships with refugees were shaped, what difficulties they encountered, what successes and failures they experienced, and how they felt about these. In addition, we conducted participant observations of meetings and social gatherings to identify emotions, interactions, and (seemingly) trivial behaviors. Finally, we conducted two focus group interviews, one with six refugees and the other with three volunteers and five social workers being consulted as experts, to validate results and further explore mutual relationships and perceptions.

3.3. Respondents

To select respondents, the first author approached grassroots organizations and attended community centers, activities by and for refugees, and citizenship classes. She recruited respondents while talking to people directly and through word-of-mouth. In selecting refugee respondents, we strove for an equal representation of the population in gender, age, education level, and ethnicity. Of the 29 selected refugees, 20 are from Syria, six from Eritrea, two from Iraq, and one from Afghanistan. Sixteen of them are women and 13 are men. Eight are 29 years old or younger, 13 are between 30 and 49 years old, and eight are 50 years old or older. Nine have no education beyond elementary school, 14 have mid-level education, and six are highly educated. These data are presented in Table 2.

Table 2. Demographics refugees.

Refugees from		Male	Female	Young	Middle	Old	Low education	Middle	High
Syria	20	9	11	4	8	8	4	10	6
Eritrea	6	2	4	3	3	—	4	2	—
Iraq	2	2	—	—	2	—	1	1	—
Afghanistan	1	—	1	1	—	—	—	1	—
Total	**29**	**13**	**16**	**8**	**13**	**8**	**9**	**14**	**6**

Regarding the volunteers, nine are female and three are male. Eight of them are aged over 50. Eight of them come from the Netherlands, while three are from Syria and one from Eritrea.

3.4. Data Analysis

We edited and subsequently coded our data with ATLAS.ti, identifying a variety of emotions among respondents. We categorized these emotions into feeling rules and framing rules, distinguishing between the community or self-reliance citizenship regime. For example, an expression such as “you feel better as a human being if you are significant to someone else” underlies the feeling rule “enjoy helping others,” which fits into the community regime. We built our analysis by moving between theory and data, a process referred to as abduction. Abduction involves creatively formulating a hypothesis or theory based on data, that can explain the data (Bosch & Boeije, 2010), as illustrated in Figure 1.

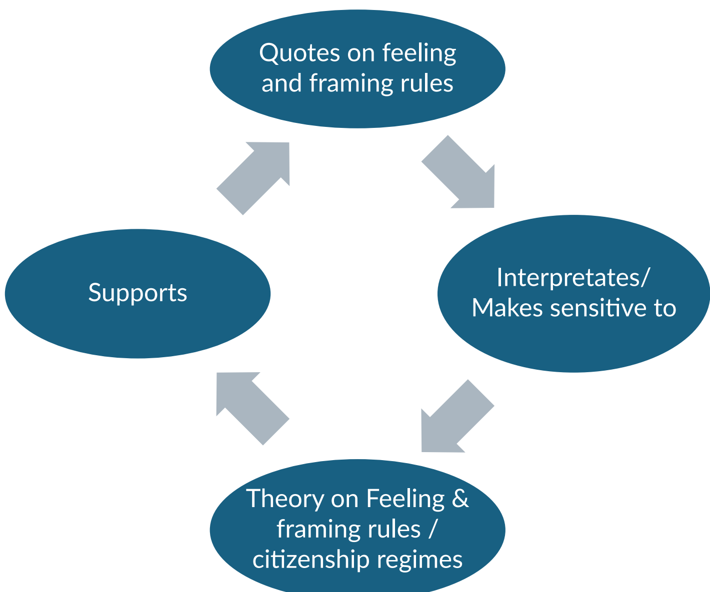

Figure 1. Abduction.

Because of the lack of fluency in Dutch of some respondents, some quotes have been linguistically modified, while staying as close as possible to the content. Table 3 shows the total of data analyzed for this article.

Table 3. Data analyzed.

Area	Interviews refugees (R)	Interviews volunteers (V)	Observations	Focus groups
Greentown	11 (12 respondents)	8 (9 respondents)	8	2
Riverfield	8	5	6	—

4. Findings

4.1. Framing Rules of Volunteers and Refugees

In describing the framing and feeling rules volunteers and refugees cope with, we demonstrate what emotional labor demands from "ordinary flesh-and-blood" people. How is the arrival and integration of refugees framed by both refugees and volunteers? And how are these frames related to the different regimes? Many refugees underline the importance of self-reliance, stressing the framing rule that it is important to "be an independent citizen who can take care of themselves." As Ida (Syria, 36, former teacher) notes:

> I have to do that [build a life], no one can do it for me. Then yes, I have to think positively....For the future of my children. Me and my husband are responsible for them. For a good life, for a good education. (R2 Riverfield)

Volunteers also emphasize the importance of self-reliance, but they rarely put it into practice. They bring in different arguments: They feel that life in the Netherlands is (too) complicated for refugees to do it themselves, so volunteers need to take over. Also, steering toward self-reliance for them conflicts with providing care. Volunteer Dora (63), the mentor of multiple refugees, briefly summarizes:

> We are these half-mothers, we like to take care of them. Although actually, you should make them independent. (V3 Riverfield)

Most framing rules expressed by volunteers refer to the community regime. They stress the importance of building and maintaining a community so that refugees feel welcome and at home. Therefore, it is important to “establish contact with refugees,” ideally immediately after their arrival. Kim (60), who volunteers for the church, recalls their arrival by bus at the emergency shelter:

> The first thing when the door of the bus opens should be that you feel that it is okay that you are there. And not people booing and saying “Go to your own country.”...I think there were easily twenty, twenty-five people or so standing there [welcoming them]. (V4 Greentown)

According to volunteers, this also demands activity from the refugees, as “contacts should be reciprocal.” Malad (46), who herself fled from Eritrea and has been in the Netherlands for about 10 years, organizes meetings for the Eritrean community:

> I am good at cleaning and babysitting....If needed, I look after the children. And if I need it one day, then I leave my child with my friends. I live with my neighbors, with my church people. It is not like I depend on those who give, but we give and take. (V6 Greentown)

For some interviewees, establishing contact is a practical translation of their social criticism. In our society, people live too much apart and hospitality is underdeveloped, they argue. This results in the framing rule that “helping each other is crucial and transcends boundaries.” Margriet (68), who is active in a church initiative that refurbishes refugees’ homes with secondhand furniture:

> From our neighborhood and from all over the city people come there to meet and to ask [refugees] what they need. And we come there to help newcomers. People who...are very old, for example, or alone. People who have no other family members here....As an organization this gives us very positive energy. Many people come there. They say here it’s like grandma’s house. (V1 Greentown)

Establishing contact requires intricate communication skills. Volunteers argue that they should avoid both friendship and therapy. Refugees face significant challenges, but attempting to fully grasp their experience should be avoided. Instead, “contact should remain light,” without rooting for traumas. This can be realized through everyday activities, as Marleen (53), who set up a garden project, argues:

> Someone...tells that story. And it gets heavier and heavier. And the person is actually just heartily depressed. And then at the right moment, you say “Come, let’s go water the plants again.”...Show your compassion and then pick up the thread of gardening, because that’s our tool. The garden, doing things, being active, using your body, clearing your head. (V2 Riverfield)

Her behavior and feelings show the same focus on practical tasks that Maestri and Monforte (2020) found in their study.

Solidarity can also require confrontation, for example when someone stands near the refugee bus with a banner proclaiming that the refugees must “go home” (to their country of origin). Kim, the woman welcoming

refugees, sees it as her duty to stand up for refugees and confront the banner carrier. This shows the framing rule that you should "not act on the basis of prejudice or previous experience." She tried to educate one of the non-welcoming citizens on the framing rules:

> I had a situation with a man on a moped who shouted something ugly, and I said: "Why do you say something so ugly?" And, well, he said: "Yes, they come here to rape and...we are no longer safe." And then I explained to him: "I was...sexually abused by a white, balding man. And you are white and balding. So you are a perpetrator....So for me...you would rather fit into a perpetrator profile than those men who are about to arrive." Then he said: "Yes, you're actually right about that too." And he started his moped and left. (V4 Greentown)

Thus, volunteers and refugees apply multiple and quite demanding framing rules: one should not have prejudices, one should respond lightly to stories of sorrow, and one should make contacts reciprocal. They demand a lot from a person's cognitive, emotional, and social skills. Some of these findings concur with the findings of Eliasoph (1997), though there also seem to be differences. It is interesting, for example, that Kim does not try to avoid politics. She differs in this respect from the volunteers that Eliasoph encountered.

4.2. Feeling Rules

Framing rules form the basis for feeling rules. In changing or complex social circumstances, it is often not clear what emotions are expected and appropriate. Therefore, people look for rules that they can or should set for themselves: Am I allowed to get angry in this situation? Should I be grateful for the help of others, even if I don't always appreciate it? We will discuss the feeling rules of both volunteers and refugees in relation to the self-reliance regime and the community regime in turn.

4.2.1. Refugees and Volunteers About Self-Reliance

Refugees express several feeling rules in relation to the self-reliance regime. One way to relate to the self-reliance regime is to adjust your wishes. If you "limit your desires," you can fulfill the obligation to be self-reliant. This is palpable when Nour, a Syrian woman aged 38, explains:

> I'm not a person who always asks for more. I just want a few things, I arrange everything myself. Then I don't have problems with them [the authorities]. (R2 Greentown)

Refugees also struggle with another feeling rule: having to "enjoy chances," also when these don't meet their standards. To accept the chances they get, negative feelings must be suppressed. Syrian Mo (45) says:

> You have to start from the bottom up. No more big dreams. Accept that there is a lot of stress and you have no job, and no house, while in Syria you had all that for a long time. (R1 Riverfield)

Khaled (32) from Syria sighs:

> I have done everything to get a job, learn Dutch, and pursue an education, but still...no work. I do not think about that, that is for later. I already have a car, education, contacts with other people. (R3 Riverfield)

Achieving independence affects the mental well-being of refugees, as previous research has shown (Paudyal et al., 2021; Walther et al., 2021). Our findings show how refugees try to manage feelings and frustrations. Failing or struggling to achieve independence, especially in a clearly present (national) self-reliance regime, can be particularly frustrating.

Among volunteers, we found few feeling rules concerning self-reliance. Some do “feel responsible for making refugees independent” and express feeling rules towards refugees about feeling hopeful and optimistic. Pete, a 66-year-old man actively involved with a family, sternly says:

> I say, gee, you have now passed language level A2, so you can do it [go to the dentist or doctor]. Go and do it yourself. (V5 Greentown)

Besides, volunteers can struggle with feeling rules about guilt: Should they or should they not feel guilty about being too caring? This was expressed earlier by Dora, the volunteer mentoring refugees, who considers herself to be “half a mother.” She knows the policy goal is independence and wants to comply, but at the same time, it does not feel natural to her.

4.2.2. Refugees' Feeling Rules About Community

Refugees express various feeling rules about making and sustaining a community in their new living environment. Many repeatedly express that they “have to feel gratitude, sympathy, and respect for the host society.” They praise the Netherlands, a country full of friendly people, for receiving them and enabling them to be safe.

Many refugees desire informality, conviviality, and substantial new contacts, and struggle with “feelings of disappointment” because they experience that neighbors are busy and already have their own lives. As Raheb (30) from Syria states: “Many people. No time” (R11 Greentown). And Eden (46), a woman from Eritrea, struggles with her disappointment about people being in a hurry:

> It is really good to live here. I have nice neighbors. Downstairs is an old neighbor. Once I lost a key, then she was really nice, she helped me. All the neighbors are really nice, they say: “Hi, hi, how are you?” Maybe people are in a hurry, but people help really well. (R6 Greentown)

At the same time, they try hard to give something back to society, based on a sense of reciprocity, like Sara (33) from Eritrea: “I get help and also like to help other people” (R5 Riverfield). The feeling rule to “feel generous to the host society” is at play here.

4.2.3. Volunteers' Feeling Rules About Community

In both Greentown and Riverfield, many volunteers give refugees a warm welcome and help them to make contacts and become part of the community. A feeling rule volunteers express is that they have to develop “feelings of tolerance and curiosity” in order to be open and welcoming. Assur, a 45-year-old man who fled from Syria and is active in a cultural center, explains:

> Being open is done by listening carefully. You shouldn't reject those people, because those people have a story and experiences. Then you have to say: "Do you understand this? And do you understand that?" That's the way to build bridges. (V3 Greentown)

Much emotional labor is involved to comply with that feeling rule. Some volunteers talk about undesirable emotions being evoked, like feeling annoyed by people who don't conform to their standards. This can affect their self-image, according to Marie (35), who started a living group that welcomes refugees:

> By dealing with people who are really very different from me, I learned that I am not at all as sweet as I thought. Less social and less tolerant, because I find a lot of things very irritating. So I've been very angry a lot too. They made loud noises every night and, yes, I found that very difficult. (V3 Riverfield).

To feel tolerant, you have to overcome your aversion and instead develop empathy. As Mina (60), another volunteer at the cultural center, states: "You need to look each other in the heart, so you need to open your heart" (V2 Greentown)

Another feeling rule of volunteers is that they should "feel equal towards refugees" and interact with refugees on an equal footing. They must replace possible feelings of superiority with curiosity and a willingness to learn. A social worker training volunteers to mentor refugees encourages these feeling rules as she states:

> Do you see these people [refugees] as "I'm the caregiver and I'm going to help you?" Or do you see these people as...equals, who also have their own background in a culture from which we can learn a lot? And if you can just start giving them that feeling, that "you are important to our culture, because you have a lot to offer," I think that's really a lesson for Dutch people. That they have to start learning how much these people can bring and give to us. (social worker focus group 2 Greentown)

Interaction should be experienced as instructive rather than difficult because you learn from it and it enables personal growth. You must struggle with negative feelings about others and stop being judgmental. Volunteer Marie says:

> Other cultures hold up a mirror to me and ask me what kind of judgments I have about many cultures. I find that really complicated. Because I still have them. So I think it is also a real awareness of your own prejudices and your own limits at the same time. (V3 Riverfield)

Volunteer Marleen who tries to feel equal ("it is nice to have a completely egalitarian point of view") argues that feeling equal is only possible with refugees who have been around for a while and have become volunteers themselves:

> I think it's very nice to have a completely egalitarian point of view. Then I can ask them [refugees] for advice, like: "What should I do with this?...I'm going to do it like this and like that, what do you think?" Well, that's great fun because then you think along with each other. (V2 Riverfield)

Many volunteers also reason that to manage emotions as a volunteer, you need to lower your expectations of your relationships with refugees. You should not expect too much from the relationship and instead, prepare

for disappointment so you do “not feel aversion or frustration.” While supporting the other person, you should not get attached and avoid the emotional expectations of close friendship. However, neither should it feel like just duty. This is difficult but you must keep trying. A social worker who trains volunteers points out that this is a delicate balance:

> Every refugee was given a mentor, a volunteer who helped them at home, with appointments, and so on. So we looked, who are really friends-friends? And who are [proper social worker volunteers]? A lot of people who volunteered said, well, “I am the mentor.” But while we did have a working method for mentoring refugees, many volunteers didn’t follow it, they were like friends [with their charges]. (S4 Greentown)

Lowering expectations can also include practicing civic indifference: trying to let things slide. The first author observed, for example, how just before the start of a meeting, a man shrugged his shoulders when a female refugee refused to shake his hand (observation 3 Greentown).

As also mentioned by other scholars, volunteers are highly committed, and this commitment involves many emotions (Boezeman & Ellemers, 2007; O’Toole & Grey, 2016; Ward & Greene, 2018). It is not surprising that particularly volunteering involves a lot of emotional labor, as our results demonstrate.

4.3. Volunteers With a Refugee Background

The volunteers with a refugee background, mainly originating from Syria or Eritrea, often relate well to the refugees they support. They speak the same language, can understand the customs in the country of origin, and they also had to (and often still have to) build a life in the new country. They may have to perform less emotional labor than volunteers who are originally Dutch. Feeling equal towards refugees, feeling empathy, and helping others often came relatively easily to them. This manifests itself not so much in a different use of the language—they have the same feeling and framing rules—but is rather revealed by their natural way of acting. We observed a certain ease, such as in the Iranian eating group organized by Javed, a man from Iran. He sits calmly drinking with other men almost all the time, occasionally initiating some actions, but all the time the group looks like a second home to him (observation V1 Riverfield).

The same goes for Assur, who feels tolerant and curious in shaping his cultural center, and Malad, who stresses the importance of reciprocal contacts. That is not to say they do not have frustrations, or cannot get exhausted. Malad, who runs an Eritrean meeting group and helps many individuals, feels that she should make refugees self-reliant—for their sake but also for her own well-being:

> Some refugees take advantage of your good heart. People can cycle themselves to do their shopping. You can show them the way, but you don’t always have to do everything for them. I do a lot and I have to guard the boundary for myself, protect myself. (V6 Greentown)

Altogether, it is a complex relationship between refugees and volunteers: closeness but no friendship; come close but also keep some distance. You are not colleagues, neighbors, or close friends. What kind of relationship is it and what can you expect from it? How do you manage the relationship emotionally? Apparently, there is a great deal of emotional labor involved, that touches on core emotions such as anger,

shame, and fear as categorized by Flam (2005). Examples of types of feeling rules we found are summarized below in Table 4.

Table 4. Feeling rules.

	Self-reliance regime	Community regime
Refugees	Limit your desires Enjoy chances	Feel grateful, sympathy and respect for the host society Feel disappointed about the lack of community Feel generous to the host society
Volunteers	Feel responsible for making refugees independent Feel guilty about being too caring	Feel curious and tolerant, enjoy receiving guests Feel empathy, love, and caring Feel equal toward refugees Do not feel aversion and irritation Feel civic indifference

5. Discussion and Conclusion

Like every other study, ours has some limitations: It concerns a small-scale qualitative study with a limited number of respondents. Furthermore, emotions can also be related to factors such as family patterns, character, and education, which have not been studied in depth. Additionally, we did not deliberately ask about feeling and framing rules because their prominent role came to the surface during the process of coding and analyzing. Nevertheless, our findings are relevant as an addition to the field of SoE, empirically displaying how emotional labor is practiced in the context of integration. Through this research, we place emotions in their social context and incorporate the impact of social structures (in the form of citizenship regimes).

We can now answer our research question: What kind of emotional labor is involved in the solidarity work that occurs between refugees and the volunteers who help them?

Hochschild's theory on feeling and framing rules enabled us to give more structure and depth to experienced emotions. We found that refugees and volunteers are subject to two demanding citizenship regimes, the self-reliance regime and the community regime, each with their own framing and feeling rules. Volunteers express more feeling rules related to the community regime than refugees. This may have something to do with the fact that refugees, once they have decided to flee and build a new life in another country, have no choice but to adjust. Volunteers, on the other hand, are entirely free to help or refrain from helping. Hence their emotional labor is more intense. They struggle with feelings in a situation of their choosing; feelings that they could also avoid or get rid of. So, the situation and the emotions it arouses are felt as their responsibility. One way to limit the burden of this responsibility is to focus on practical tasks, as is also shown by Maestri and Monforte (2020).

This struggle with moral emotions usually takes place in silence: What can and should I feel in this relationship? How far can or should I go with my tolerance? This is echoed by studies elaborating on the emotional labor

involved in volunteering, which can lead to emotion avoidance, evasion, or even burnout (e.g., Allen & Augustin, 2021; Eliasoph, 1997).

Refugees share this community ideal in their longing for a place in society. However, they are faced with the limits of community life as they experience Dutch people can be highly busy with their own lives. To find a place in their new surroundings, they strive to achieve self-reliance and independence. The way refugees cope with feelings concerning community life complements previous research, which adopted an individual therapeutic or pathological perspective on the emotions of migrants (Mahmud, 2021).

Our findings elaborate on how refugees cope with their emotions and show how volunteers perform emotional labor, struggling with demanding framing rules and concomitant feeling rules. Volunteers with a refugee background, however, seem to do less emotional labor than volunteers who are originally Dutch. Sharing similar experiences and speaking the same language can make it easier to relate to and support refugees. This is in line with multiple scholars who endorse the importance of practical and emotional support of like-ethnic peers to integrate with new communities (i.e., Anleu Hernandez & García-Moreno, 2014; Martone et al., 2014; Nash et al., 2006).

We studied two different neighborhoods, but we did not find differences concerning emotional labor and feeling and framing rules, even though local policy in Riverfield is more focused on community than local policy in Greentown. Apparently, this does not make a difference in the framing rules that refugees and volunteers experience.

Our research shows that a great deal of emotional labor is involved in creating a solidary society. Both volunteers and refugees struggle with demanding feeling rules that relate to the community regime and self-reliance regime. Can we build a society on expectations of such emotional labor? What is needed to promote and sustain such behavior? Extreme right-wing voices that want to keep refugees out and argue that they should at most be accommodated in their own region offer liberation from the complicated feeling rules that come with community regimes' integration of refugees. On the other hand, progressive politicians who advocate a more generous refugee policy rarely pay attention to the emotional labor this involves. They speak in terms of human rights and humane policies but often keep silent on what this means for everyday interaction. A few decades ago, progressives still had an optimistic story about multicultural society as an enrichment for all. Today, they no longer tell that story, but instead stick to the more abstract notion of human rights. We argue that progressives must pay more attention to the emotional labor involved in hosting refugees. Solidarity comes with emotional costs. As Prainsack and Buyx (2011) argue, solidarity consists of "shared practices reflecting a collective commitment to carry 'costs' (financial, social, emotional or otherwise) to assist others" (p. 14). It is important to acknowledge these costs and make them part of the political conversation on solidarity. These costs are no reason to abandon solidarity; the point is that recognizing them can support people to perform solidarity over time and help them cope with emotional hurdles.

Additionally, we argue that it is important that policymakers and politicians realize that the community regime looms large in neighborhoods, even when the self-reliance regime is dominant at the national policy level. Acknowledging the hidden dominance of the community regime helps to better understand where feeling and framing rules come from. Understanding the origins and impact of emotional labor facilitates an

open discussion. The emotional labor in solidarity work makes a multicultural society livable. It is important to understand the emotional foundations if we want to sustain them.

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Conflict of Interests

The authors declare no conflict of interest.

Data Availability

The data that support the findings of this study are available from the corresponding author upon reasonable request.

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