STUDIES IN INCLUSIVE EDUCATION

Inclusive Communities

A Critical Reader

Andrew Azzopardi and Shaun Grech (Eds.)

Sense

INCLUSIVE COMMUNITIES

STUDIES IN INCLUSIVE EDUCATION
Volume 16

Scope

This series addresses the many different forms of exclusion that occur in schooling across a range of international contexts and considers strategies for increasing the inclusion and success of all students. In many school jurisdictions the most reliable predictors of educational failure include poverty, Aboriginality and disability. Traditionally schools have not been pressed to deal with exclusion and failure. Failing students were blamed for their lack of attainment and were either placed in segregated educational settings or encouraged to leave and enter the unskilled labour market. The crisis in the labor market and the call by parents for the inclusion of their children in their neighborhood school has made visible the failure of schools to include all children.

Drawing from a range of researchers and educators from around the world, Studies in Inclusive Education will demonstrate the ways in which schools contribute to the failure of different student identities on the basis of gender, race, language, sexuality, disability, socio-economic status and geographic isolation. This series differs from existing work in inclusive education by expanding the focus from a narrow consideration of what has been traditionally referred to as special educational needs to understand school failure and exclusion in all its forms. Moreover, the series will consider exclusion and inclusion across all sectors of education: early years, elementary and secondary schooling, and higher education.

Inclusive Communities

A Critical Reader

Edited by

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INTRODUCTION

SHAUN GRECH AND ANDREW AZZOPARDI

SCOPE AND BACKGROUND

The term *Inclusive Communities* has increasingly featured in recent years, at policy, practice and academic levels, drawing from different disciplinary standpoints such as education, anthropology, sociology, psychology and philosophy among others. This has included efforts at addressing the exclusions confronted by certain populations, or to develop the notion of and mechanisms by which communities can include those who are marginalised and/or oppressed. Still, this deceptive inter-disciplinary term remains shrouded in epistemological darkness, conveniently endorsed but often little understood and insufficiently theorised and developed.

This text provides an exciting introductory textbook, drawing from various fields of knowledge, in an effort to theorise, create new and innovative conceptual platforms and develop further the hybrid idea of inclusive communities. Drawing from policy, practice and research perspectives, this rich text provides global perspectives highlighting the challenges faced by multiple populations. It brings academics and activists to fill the persistent gap in the problematisation of these issues, and in the process pushes the envelope and understanding of inclusion, communalism, membership, citizenship, identity and identification among other critical issues. The end is the reinforcing of the pledge towards inclusivity. More specifically, we seek to:

- Push the theoretical boundaries of the notion of 'inclusive communities': this book is highly interdisciplinary ranging from fields including anthropology, development studies, critical disability studies, race and migration theory, cultural studies and environmental studies among others. Texts also approach the subject from alternative epistemological stances such as post-structuralism and postcolonialism.
- Highlight the threats to inclusive communities and factors and processes creating opportunities to combat the disenfranchisement of marginalised groupings
- Engage with policy, practice and other challenges confronting specific marginalised populations, and through these to critically engage with a wide range of themes: disablism, race and racism, (dis)empowerment, identity, gender, globalisation, social cohesion and social capital among others.

A. Azzopardi and S. Grech (eds.), Inclusive Communities: A Critical Reader, 1–9.

This edited book has therefore been compiled with a view to providing an innovative and comprehensive reading for students, academics, practitioners, activists as well as any other person looking for a critical text into inclusive communities. In light of this, the themes and questions that are problematised and explored are also far reaching:

- What are inclusive communities, and alternatively what are non-inclusive communities?
- What are the challenges and opportunities faced by specific populations, and what spaces can be nurtured and/or created to challenge marginalisation?
- What potential impacts (present and future; opportunities and threats) confront specific populations from micro, macro and global processes, ranging from economic factors to stigma?
- What is the role of culture, history, religion and/or rights in impacting lives and communities?
- How are new technologies and social media used to de/construct communities?
- Do discourses on inclusion and inclusive communities cater for the needs of marginalised populations/or oppressed peoples?
- The relationships, dynamics and impacts between development, poverty and inclusive communities
- Human rights: from rhetoric to practice
- Researching marginalised populations – new frontiers, new methodologies, new and decolonising approaches

LAYOUT OF THE BOOK

Chapter 1: Understanding Communities: Rebecca Lawthom and Pauline Whelan

Implicit in the term community are processes of inclusion and exclusion and people are counted in or out of settings with potentially serious consequences. To understand inclusion/exclusion we need to theorise what communities are, and how participation happens. In this chapter, we present a flavour of established ways of thinking about community, followed by a contemporary approach-communities of practice. This framework describes how these participatory trajectories are structured and facilitated by particular group practices that can promote or inhibit inclusion. We invoked an example from an inclusive initiative in primary schools where the communities of practice model, was employed to understand and elaborate the different positions and practices adopted by various members of the research project. The identification and elaboration of these positions and practices served to highlight the utility of operationalising the model within groups specifically oriented towards positive social change. The example from the teacher training programme showed how transgressions from the expected participatory trajectories afforded by the model can help isolate and elucidate exclusionary practices. It is important to understand the socio-historical context of various definitions of community, and also to acknowledge the Global North bias of many existing theories (Grech, 2010). Understanding various conceptions can inform and further current notions of community by avoiding the academic reproduction of social marginality, and by extending the conceptual boundaries of community. However, when considering the inclusive or exclusive nature of communities, the exigency of arriving at an absolute definition of the term ‘community’ seems to fade. Instead, we need to shift the focus towards understanding the participative trajectories and group practices that contribute to, or inhibit group cohesion and social inclusion. Communities of practice can therefore contribute to our understanding of these inclusive or exclusive processes.

Chapter 2: Community development’s radical agenda: Social justice and environmental sustainability: Margaret Ledwith

Its process, although often a practical response to immediate issues, involves popular education, learning to question the everyday taken-for-granted contradictions that are woven through our everyday lives. Out of these altered perspectives on life emerges a more critical awareness, and this gives rise to the confidence, autonomy and insight to act collectively together to improve the quality of life for everyone. For practitioners, this calls for an analysis of power, the generation of theory in action, and the organisation of collective action from neighbourhood to global levels with the purpose of creating inclusive communities in a more inclusive world. Social divisions are greater than ever, both within and between countries, as neoliberal globalisation extends its reach, beaming a free market principle based on a profit imperative across the world. At the same time, community development’s commitment to social change is being distracted under a smokescreen of managerialism, as our transformative concepts become diluted and our practice becomes embedded in policy as improved service delivery. Meanwhile the world faces escalating humanitarian and environmental crises. This chapter is based on the hope and optimism that we can easily and readily reclaim our radical potential if we identify the spaces for creating critical dissent dialogue as a basis for vigilant practice for a fair and just democracy, a world build on respect for all people and the earth itself.

Chapter 3: Spaces for inclusive communities: Reflections on contemporary society: Andrew Azzopardi

What happens when people find themselves left out of communities? Who is missing and why does it matter? What can one do to narrow the gap? How has community been represented in theory? The discourses around community are countless. The quality of life of a population is an important concern in so many areas and a significant part of our standard of living is measured by social and economic factors. This chapter will conceptualise ideas and theories of association and associated life, social capital and civic community. It will weave what I consider to be some of the most significant, focal and complex issues in this debate in an attempt to locate boundaries and space. The notion of ‘community development' is central to this debate and crucial in the representation and understanding of what encapsulate this phenomenon. The discourses around community are myriad (Mills, 2006) but the debate centers around an engagement that makes us more confident and in charge of our lives, more able to contribute to our local community and to assimilate social and cultural activities as an illustration of citizenship (Lotz, 2008). This chapter concludes that community has been associated with learners engaged in establishing effective public participation within participatory processes and how the role of social operators, community leaders and social activists should be prominent in policy-making and development whilst the State's primary role is to focus on policy co-ordination.

Chapter 4: People like us: Queering inclusion, rethinking community: Mark Vicars

In this chapter, I draw upon my own and other gay/queer men's life stories to speak out about how heteronormative practices in everyday life can create the conditions which silence and performatively exclude sexual differences. I suggest how a queer location can be a way of critically being present to, and a way of interrupting how heteropower/knowledge gets materialised and rethink the notion of community which doesn't include the 'longing for inclusion'. Contesting and problematising how belonging is habitually embedded in social practices, in the inter-relationship between culture, social structure and individual lives, this chapter endeavours to show something of how the critical practices of inclusion/exclusion get worked and re/worked. The experiences outlined in this chapter bring together understandings of community which are intimately connected to the informants' chosen manner of being in the world, and position an understanding of community as thinking and feeling in relation with self and others. This chapter suggests that inclusion requires a commitment to making 'Other' interpretative locations more than available. It requires an understanding that in our various attempts at ensuring we remain inside the culturally intelligible, all of us have the potential to marginalise and exclude. It shows how difference matters and posits the notion that none of us are immune to being worked over by the us/them, inside/outside dichotomizing practices that make differences exclusionary.

Chapter 5: Disability, communities of poverty and the global South: Debating through social capital: Shaun Grech

This chapter bridges the gap between disability and development studies by exploring avenues for the application of social capital in elucidating and exploring broader epistemological and practical issues in the debate on disability in the majority world. The chapter argues that social capital, despite its neoliberal undertones and opportunistic stance in its adoption by the development sector, provides useful avenues for bringing development and disability closer together, as well as focusing discussion on local contexts, and the role of social relationships and community in the construction of disability, as a source of security, access to resources, and often survival in the absence of formal safety nets. Social capital may also draw attention to and potentially challenge the Western emphasis on self-reliance and independence (individualism), as well as discourse about the presumed (universal) treatment of disabled people across cultures. This opens up the analysis to more micro views of disability within local and social settings and associated factors and processes, notably poverty and its dynamics.

Chapter 6: Negotiating stigmatized identities and overcoming barriers to inclusion in the transition to adulthood: Marilyn Clark

Traditionally, research on stigma has focused on the perspectives of dominant groups and how they respond to stigmatised populations and minority groups (Crocker & Quinn, 2003). In this chapter, the focus is on the perspectives of the stigmatised. Through the use of the narrative approach, a plurality of truths is encouraged in order to understand the interactions that occur among young people, groups and societies (Jackson, 1998; Plummer, 2001). Different narratives of stigma are examined to this end. The chapter draws on Goffman's concept of stigma to explore youth transitions in a society that retains many traditional characteristics. Semi-structured interviews were undertaken with stigmatised young people with the goal of producing narratives, and the chapter presents an analysis of the main emergent conceptual categories, namely: the experiences of stigma; stigma effects; and stigma management strategies. The chapter concludes by drawing attention to the pervasive nature of stigma and the importance of structure, agency and reflexivity in youth transitions. Despite the reduced power that a stigmatised situation may place young people in, the successful negotiation of risk trajectories can translate in the development of a resilient self and a successful negotiation of the passage to adulthood.

Chapter 7: Latin American women and inclusion in public and private communities: Monica Rankin

Gender relations in Latin America are based on long-standing, yet constantly-evolving cultural norms and social expectations. Those norms and expectations are unique to Latin America and do not fit the concepts of feminism, individual rights, and marginalization that often dominate discussions of gender and the notion of inclusive communities in the western world. Gender expectations in Latin America are tied to centuries-old Iberian customs, a pervasive religious culture, and laws designed to preserve and protect those traditions. My chapter historicizes the role of culture, customs, religion and/or laws on inclusive communities through the lens of Latin American gender relations. I frame the notion of "community" according to well-established historical models based on women, family, and communities in Latin America as public and private spaces. This differs from western culture where, according to liberal theory, the individual is the defining unit of around which society should be organized. In Latin America, the ways in which women are either marginalized or included in the larger community are often based on more intimate cultural relationships within the family. The ways in which many

Latin Americans define "inclusion" or "marginalization" are often quite different from the ways in which western cultures approach those concepts. As a result the notions of "rights" and "equality" in Latin America are generally tied to the well-being of the family. During the nineteenth and twentieth centuries, a brand of feminism specific to Latin America emerged through which women have demanded rights based on their role as part of the family unit. For example, many suffragists argued that women be granted the right to vote not because it was a natural right to which each individual was entitled, but rather so they could effect political change to benefit the family. By considering important moments throughout the nineteenth and twentieth centuries, I argue that many Latin American women traditionally viewed their place within the family as one of "belonging" rather than an externally-imposed notion of "inclusion" based on equality and individual rights. But as the public and private community space for those women continually intersected, concepts of "belonging" and "inclusivity" also melded.

Chapter 8: Economics, game theory and disability studies: Towards a fertile dialogue: T. Kawagoe and A. Matsui

This chapter analyses inclusive communities by applying economics, mainly microeconomics and game theory to disability studies. First, we give a brief overview of the basics of economics and the key concepts in game theory, including strategic complementarity and network externality. These not only make a departure from the standard price theory, but also respond to some of the misguided criticisms against economics, particularly market fundamentalism and the supremacy of the rational agent. Economics affirms the modern view of a human being as an autonomous, rational decision maker. However, some, if not all economists recognize that in the real world, there is no human being who has such cognitive/computational capacity. Instead, human beings are actually influenced by their surrounding socio-cultural environments, develop some boundedly rational behavior, or blindly follow established conventions in order to resolve the many problems they face. We explain a recent game theoretic attempt in which, first, discrimination emerges as an equilibrium even if there is no inherent factor. Following this, if one tries to understand such an equilibrium based on one's limited experiences, prejudices may emerge. The endogenous emergence of stigma is explained. The capability approach (Sen, 1999) may enable us to incorporate the social model of disability into economics. It can provide us with insight into the existence of discrimination resulting from a disabling society lacking appropriate accommodation. We also point out that the dichotomy between the society and individual implicit in the social model of disability is problematic from the perspective of economists adopting methodological individualism as a research methodology. Overcoming such a dichotomy in disability studies therefore seems to be necessary to initiate a conducive dialogue for building truly inclusive communities using economics and game theory.

Chapter 9: Female asylum seekers living in Malta: approaches to fostering 'inclusive communities': Maria Pisani

This chapter seeks to problematise notions of community and position this debate within the odyssey of female migration, more specifically Sub-Saharan African asylum seekers in Malta. I confront the assumed homogeneity of any community, and hope to demonstrate how contrary to the generalizing and essentialising political and public discourse in Malta, the Sub-Saharan African asylum seeker population also exhibits diversity, hierarchal structures and exclusion. This, I argue, is particularly salient in the case of female asylum seekers whose experience is often one experienced at the margins – gendered and racialised, frequently marked by poverty, violence, and political disempowerment. A consideration of such matters requires the need to explore understandings of 'community', their scope and place in an increasingly globalized and yet localized world, and to reconsider concepts of inclusion. Despite the influence and importance of transnational communities and varied influences from overseas (e.g. financial, relational, political or others), physical place remains central since this embodies the tangible proximity wherein female asylum seekers live out their day to day lives. It is within this space, that alliances and solidarities may be forged between communities made up of composite representations of identification and belonging. The issue of inclusion however, cannot be separated from issues of access to power, rights and material wellbeing. In conclusion, a pedagogical response is considered as a means of transcending gendered and racialised structures and forging alliances based on common interests within transient communities.

Chapter 10: The value of mutual support through client communities in the design of psychiatric treatment and rehabilitation programs: James M. Mandiberg and Richard Warner

Drawing an analogy with immigrant and ethnic minority communities, we argue that mainstreaming is not necessarily the best solution for many people with mental illness. Ethnic minorities have multiple successful pathways towards community. They can choose to live, work and socialize in the dominant community, they can remain in their sub-communities, or they can move back and forth, choosing some activities in each. We suggest that people with psychiatric disabilities should be allowed these same three choices and that we should not assume that integration into the broader community is the ultimate goal. Further, without the option of a strong and accepting sub-community, many people who cannot assimilate into the broader community are condemned to a marginal status, fitting in nowhere. With this in mind, we cite successful models such as the therapeutic community and the psychosocial clubhouse model that build on the value of the community of people with psychiatric disability. We discuss business incubators that help community members develop micro-businesses and the possibility of a user-friendly bank to assist in capitalizing such ventures. We describe an economic development approach which points the way to enterprises that can advance the economic circumstances of the service-user community and offer members of the group work opportunities and leadership roles. Finally, we highlight the mutual support advantage which is present in the social firm approach to creating job opportunities when compared to the supported employment model.

Chapter 11: Beyond networked individualism and trivial pursuit: Putting disruptive technologies to good use: Alex Grech

People with access to a computer and an internet connection can now use web 2.0 or social media technologies to identify, mobilise and lead online tribes and start to break down some of the barriers to more inclusive communities. This chapter argues that despite long-standing concerns about the digital divide, privacy and control, access to disruptive technologies by networked individuals offers an opportunity for the creation and distribution of information without mediation. Although online tribes may be more ephemeral and temporal than offline networks, they may also lead to activism beyond geographical confines, with new leaders empowered to raise their voice and engage with a sense of purpose, hence creating new stocks of social capital in the process.

Chapter 12: Please, just call us parents: Engaging with inclusive approaches to researching marginalised communities: Alessandro Pratesi

This chapter reports on the complexities and rewards involved in engaging with inclusive and qualitative approaches to research, notably with marginalised communities. It draws on research conducted in Philadelphia (US), the aim of which was to build a phenomenology of *informal care*, that is, unpaid care work carried out by relatives or friends in private and non-professional settings. More specifically, the study explored the care experiences of 80 carers/parents living in the urban and suburban areas and diversified by gender, sexual orientation, marital status and type of care. One of the research's goals was that of gaining deeper insights into the mechanisms through which dynamics of inclusion or exclusion and social inequality are interactionally and situationally constructed and/or challenged. The study was based on the hypotheses that *emotions* are a key element in understanding such mechanisms, and that informal care is a strategic site to analyse them.

Chapter 13: New frontiers in research: Using visual methods with marginalised communities: Anne Kellock

This chapter seeks to demonstrate the potential of visual, participative and indigenous methodologies with marginalised communities. In particular, the chapter details research conducted mainly with primary school Māori children (aged 8-10 years old) in New Zealand investigating well-being from their own perspective utilising a range of creative methods. Further methodological approaches used within marginalised communities are also considered. There were various activities that the children participated in towards discovering how they considered their own well-being. The chapter highlights how photography allowed the children involved in the research to become fully engaged and express themselves through the visual techniques employed. It then discusses and demonstrates aspects of the children's outcomes in their explanation of well-being. Furthermore, I also map out the double-barrelled outcome whereby not only did the children show how they understood well-being but also how they experienced enhanced self-confidence and other positive changes as a result of engagement in the programme. The chapter concludes with a summary of the impacts of using visual methods.

Chapter 14: Decolonizing methodology: Disabled children as research managers and participant ethnographers: Dan Goodley and Katherine Runswick-Cole

We approach this chapter with a number of communities in mind. Disabled people, people of color and gay, transsexual and queer people share a common history of being colonized by researchers who "have probed, recollected, appropriated and ultimately exploited their lives in insensitive and offensive ways" (Llorens, 2008. p. 3). Research is an imperialist, disablist and heteronormative peculiarity of modernist knowledge production. In 1999, Tuhiwai Smith issued a call for the decolonizing of methodologies and in this chapter we take up that call. Tuhiwai Smith demands us to think again about how research can be enacted – as a liberatory rather than oppressive venture. We do so in the context of a research study funded by the Economic and Social Research Council 'Does Every Child Matter, post-Blair? The Interconnections of Disabled Childhoods (http//www.rihsc.mmu.ac.uk/postblairproject/). The aim of the project is to explore the lives of disabled children in the North of England in the light of the policy agenda for children under the umbrella of *Every Child Matters* (DfES, 2004). It is our attempts to listen to children and young people, and our on-going struggle to decolonize methodologies that is the focus here. By 'decolonise' we are referring to approaches to research that (1) do not contribute to the pathologisation, othering or individualisation of communities who have historically experienced marginalisation; (2) subvert traditional researcher-led, academia-based, and top-down models of research that have denied marginalised groups access, participation and power to the research venture; and (3) work with the complex and expert knowledge of these groups, as necessary resources for the generation of theories and practices and more inclusive approaches to research. While queer, postcolonial and disability studies overlap and are drawn upon in this chapter, our question is more specific: how can research be implemented in ways that do not colonize or exclude disabled children?

REBECCA LAWTHOM AND PAULINE WHELAN

CHAPTER 1

UNDERSTANDING COMMUNITIES

What is community and what are useful concepts in trying to understand communities? The term, community, is used in daily interaction with rather different meanings. The usage and therefore reach of the concept does not lead to a neat summary. In this chapter, we set ourselves a difficult task – which is to unpack understandings of community. This occurs in a field where writings around community are in abundance. Implicit in the term community, are processes of inclusion and exclusion – people are counted in or out of settings with potentially serious consequences. To understand inclusion/exclusion we need to theorise what communities are and how participation happens? To do this, we present only a flavour of traditional established ways of thinking about community and then a contemporary approach, communities of practice. The chapter has three aims. First, we present some perspectival ideas which derive from predominantly sociological paradigms. This approach features types and models of community. In doing this, it is noteworthy that much of the theorising around community comes from Global North settings (for example, Germany, UK and US). Secondly, we focus in on the understandings from Psychology, in particular community psychology, which offers theorising on sense of community. Whilst this addresses the human component and focuses on capacity building, there is less to offer on how communities allow participation. Thirdly, we offer a particular approach around communities of practice. This conceptual framework allows us to explore the various participatory trajectories mobilised within group settings that can enable, or inhibit social inclusion.

To start at the beginning, the word community originated from the French term *communite* which derives from the Latin *communitas*, a generic term for organized society. Further back, this connects with the notion of Polis for Greek society and ideas of citizenship in the Roman era. These ideas form the epistemology of community. Indeed, ideas of connectedness, relationality and embeddedness are core concepts in disciplines which focus on human subjectivity. How bonds form, break and how people feel, experience, perceive these bonds are the very stuff which fascinates social scientists and the lay public alike. Whilst there is no one established community definition, the centrality of it merits a review of what we know.

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Hoggett (1997, pp. 6-7) highlights the demise of 'community' as a useful concept to its return in the mid-1990s.

> A new generation of sociological and geographical researchers appear to have registered the fact that outside of the seminar room the idea of community appears to remain alive and well and people, misguidedly or not, continue to refer to it either as some thing they live in, have lost, have just constructed, find oppressive, use as the basis for struggle and so on.

For most people, lay and scientific alike, community refers to an actual place, a set of relationships or a way of delineating quality of life. The 'return' of community in policy debates and academic theorising appears to be around issues of errant communities, ones where marginalisation and exclusion are present. Community here can signify,

> system dysfunction or social pathology, social instability and threat to the existing order, an imaginary safety net or a form of social capital to be enlisted in the competitive struggle for survival … [but also as a form in emancipatory politics] … as a resource of resistance signifying the commonality of class, the uniqueness of identify or the lost ideal of a more intimate society. (Hoggett, 1997, p. 11)

The definition above, signposts the deficit or lack associated with the term, the historical ideal and the possibility of change. Hoggett (1997) argues that there are distinct dimensions key to understanding communities. The first is whether communities are related spatially or not as this related to the complexity and heterogeneity of communities and ways in which boundaries are drawn. For example, in Manchester UK there are many 'old' white working class areas which now include diverse refugee and migrant people, impacting upon the community. Secondly, the way in which social networks are configured and the centrality of women as residents, neighbours, carers and activists within them is a further dimension. Thirdly, Hoggett talks about feelings, sentiments and emotions where pride, fear, belonging and longing impacts upon relationships, trust, boundaries and identities. The ideas of sharing and connectivity are not new ones and most definitions of community imply interdependency, bonding or loyalty. These ideas were central to Tonnies' (1887) work in the nineteenth century.

HISTORICAL AND CONTEMPORARY CONCEPTS OF COMMUNITY

The German sociologist Tonnies (1887, cited in Harris, 2001) whose seminal ideas posited two distinct forms of community, have been taken up and utilised to show the waning of community spirit or sense of community. The basic thesis here is that the rapid industrialisation and urbanisation of countries, leads people to focus on self, separate more from others and become more concerned with self (Harris, 2001). The term *gesellschaft* (association or society) refers to this mode of being co-located with others in urbanised spaces with little sense of bonding or community sense. People in this account link with each other but the motivation for doing so, is more likely to be self interest. In the other type of human association, *gemeinschaft* (or community), is a tighter and more bonded social grouping, where people know each other, are linked and dependent, resulting in social cohesion. The picture painted in this account is a rural idyll where people live harmoniously and have 'unity of will' is an idealised version of human connectivity. Family and kinship are perfect accounts of gemeinschaft but pure forms of either are unlikely to be found. Critiques of this account, query the existence of this idealised form even in history but the myth continues to dominate. If we consider modern twenty first century communities, in many settings, they are characterised not by homogeneity but by diversity. Issues of age, race, gender, disability, class and sexuality permeate community relations. Community members may take up different positions within these groupings and belong to particular associations, which have their own community agendas. The different sets of concerns can result in excluding and including values and behaviours. Ultimately, violence can ensue when members feel marginalised and ignored. Whether communities of this nostalgic 'golden' era were knitted together and tightly bonded is speculative but the positive vision and promise of what this entails continue to enthral. Indeed, a more contemporary account of building, bonding and bridging ties in communities is found in Putnam's notion of social capital.

Putnam defines social capital as 'the collective values of social networks (who people know) and the inclinations that arise from these networks to do things for each other (norms of reciprocity)' (Putnam, 2000, p. 13). Broadly speaking this refers to feeling connected and forming social networks. He argues in Bowling Alone: The Collapse and Revival of America Community (2000) that social capital is declining in the US. In support of this, he presents figures which show that family dinners, visiting friends, and club attendance are all falling. These same patterns of lack are also prevalent in other Global North settings. These cultures appear to be losing a sense of community and 'we-ness' that used to predominate. This sense of loss is a key concept in community psychology where the term sense of community or psychological sense of community is used (Sarason, 1974). Ideas of social capital have been subject to critique and commentators have attacked the neoliberal notions upon which community and capital are predicated upon (see Grech, 2010).

Community Psychology and Psychological sense of community

Whilst community is a term used in many disciplines (sociology, anthropology, geography) its usage in Community Psychology, as *sense of community* is an influential concept. Community Psychology, in contrast to other forms of psychology, is a radically different approach. Burton, Boyle, Harris and Kagan (2007) propose,

> Community psychology offers a framework for working with those marginalised by the social system that leads to self aware social change with an emphasis on value-based, participatory work and the forging of alliances. It is a way of working that is pragmatic and reflexive …. It is community psychology because it emphasises a level of analysis and intervention other than the individual and their immediate interpersonal context. It is community psychology because it is nevertheless

> concerned with how people feel, think, experience and act as they work together, resisting oppression and struggling to create a better world. (p. 219)

From this definition the Psychological sense of community (Fisher, Sonn, & Bishop, 2002; McMillan & Chavis, 1986; Sarason, 1988) refers to the experience of community. McMillan and Chavis (1986) proposed that sense of community is a feeling of belonging that members share, along with a faith that togetherness will meet needs. It was designed in reference to geographical spaces, such as neighbourhoods but also other discrete functional entities such as schools, religious groups, workplaces and communities of interest. There are four elements to this, which are membership, influence, integration and shared emotional connection. There is a dynamic between these four elements as members belong, influence the group and each other, feel rewarded for other participation in the community and through sharing, identify emotional connections. Their approach led to a Sense of Community Index (SCI), an operationalised concept, which has generated much empirical work (e.g. Long & Perkins, 2003) measuring sense of community within areas and groups of people. Research centres on the idea that sense of belonging to a community impacts positively. This is articulated in different outcomes dependent on the study. The ideas of social solidarity captured in Psychological sense of community address this feeling of belonging and camaraderie which is redolent in idyllic accounts of community. It is probably questionable whether this sense can be adequately harnessed through an instrument or whether there is something less measurable and more experiential at play. Whether community is conceptualised as a common bond, a shared place; life stage; shared interests or links between individuals is unpacked in the next section. What about notions around community development discourses?

Community as place

Oldenberg (2006) notes that people, at least in the Global North, need three distinct places – the home, the office and the community hangout or public gathering place. Whilst the work component (the second place) again biases this Global North thinking, the so-called 'third place' is meant to capture the longing for spirit of community. Third places, then, are "anchors: of community life and can facilitate and foster broader, more creative interaction. All societies already have informal meeting places; what is new in modern times and in Global North settings is the intentionality of seeking them out as vital to current societal needs – the idea of place as related to well-being. Oldenberg suggests these hallmarks of a true "third place": free or inexpensive; food and drink(while not essential, are important); highly accessible: proximate for many (walking distance); involve regulars – those who habitually congregate there; welcoming and comfortable; both new friends and old should be found there. Place – a social, psychological and geographical entity however, is not as straightforward as first seems. Whilst lay and policy notions of community centre on the idea of community as place, defining place is more problematic. When someone uses the term Community care – it refers to care which is outside of the formal institution and somewhere which is more domestic.

For people with long term mental health difficulties, community care in the UK refers to care outside the hospital – within homes or hostels. Key here is the idea that community is non-institutionalised. When, however, someone refers to community shops, these tend to serve a particular geographical location. Community anchors or hubs denote local facilities designed for use by people living nearby – in a certain place. When people refer to 'my community' they will mean the place they live or the people they are connected to.

Community as a socio-spatial entity

At times, community refers to people who have face to face contact and live close to each other. A group of people attains community status when there are adequate numbers of sufficient connections between them which enables them to organise for a common purpose. This kind of mapping of and understanding of community is the one linked to community work or community development work. Here, the mapping of space and place is an important precursor prior to development occurring. Community development practitioners need to understand how to work with individuals and communities. This is usually done by working with groups with the intention of building and improvement of community. These principles pivot around the promotion of empowerment of individuals and communities. Through supporting communities to develop skills to take action, autonomous and accountable structures are promoted. Members are encouraged to learn and reflect on experience in order to enable change. These community development principles share much common ground. This idea of community, can be, of course differently understood by rather different stakeholders in the community (and indeed contestations sometimes occur around the boundary).

Community as links between people

Anthropological understandings of community centre around binding signs and symbols (Cohen, 1986). This assumes at some level, that a shared set of morals, values and behavioural norms exist. This kind of community may be related to place – individuals having Celtic origins for example may indicate these in their identity. A common bond here may be felt due to sharedness of identity and not be a result of knowing each other. Lay perceptions of community assume that strong communities are characterised by deep and positive relationships. On the contrary, when people do not feel connected, do not care about each other or have things in common, the term community breakdown is often used. In the UK terms such as 'sink estates' signal breakdown, poverty and marginalisation. Implicit in these understandings are ideas of inclusion and exclusion – excluded out of communities or included in. Putnam's social capital approach (linked to Bordieu's ideas of capital) argues that reciprocal relationships where people habitually help others out are indicative of social capital. Critics have pointed out that over strong links can be dangerous and excluding of difference. Sixsmith, Boneham and Goldring (2003) researched a strongly bonded community where homophobic attitudes were expressed. Whilst insiders felt strongly bonded and a dominant masculinity pervaded, individuals who may sexually identify differently or espouse different views felt quietened by others. Here insiders are protected and heavily involved whilst outsiders are restricted. A key issue here is one of participation – who is allowed to participate and how? In contemporary Global North settings, participation has been understood both as tyranny (Cooke & Kothari, 1995) and as transformation (Hickey & Mohan, 2004). The reality of where one sits or is positioned within a community, is therefore not simple a construction or view, it has real effects – effects which are visible particularly in participation and its impact.

Community of interests

Communities of interest are more invisible, less obvious, than communities with geographic boundaries. They pull in and link, through common experiences and concerns, individuals why may be scattered across a geographical area. However they experience difficulty, discrimination or lack of recognition when trying to put their views forward. There are communities who may share an identity and those who share an experience and concern. Examples of communities who share an identity such as heritage and marginalization (for example, the black community). People who consider themselves as having an impairment may share an experience or concern. A community of interest is defined as a group of people who may share interests. Wilmott (1986, p. 83) states that:

> ‘interest’ is broadly interpreted to cover shared characteristics as diverse as ethnic origin, religion, politics, occupation, leisure pursuit and sexual propensity.

Members of a sports club may not live in close proximity but may have much in common with each other, depending on each other for help and support. At times, communities of interest may form when groups of individuals get together to share life experiences – such as an alcohol anonymous (AA) support group. Communities of interest will share beliefs, interests and activities and are closely linked to social networks. The idea here is that those who may share a marginalised experience may well benefit from getting together and sharing.

Communities linked to life stage

Shared life experiences sometime result in communities of interest (as discussed above) or are determined by the particular life stage we are in. Interest communities are sometimes formed around these shared life experiences rather than more personal interests. Mothers with pre-school or school age children may form a ‘school gate’ community of interest around the politics of school and share things whilst children are at school. Playgroups and mother and baby groups may function in the same way for pre-school interest. Here, the community is one in which membership is evolving – there is always a ‘school gate’ community although members may come and go. Crow and Allan (1994) term these short term communities as ‘communities of limited liability’ with short term interdependence and an element of autonomy as people exercise choice about involvement. The voluntary nature of these communities hinges on temporary participation where individuals feel enabled through a common bond.

Common bond

Whichever approach is taken to interpret the nature of community, a salient and defining issue which constructs ‘community’ is a sense of a ‘common bond’. This may be a subjective feeling (for example an internet community group around an issue such as self harm), or objective (individuals working in the same school). Indeed, in internet communities or social networking sites, the common bond – the joining element, such as an element of identity, is sometimes the only link which defines the virtual community. The boundaries of community as place, interest, life-stage seem messy and overlapping – this adds richness and complexity to our understandings and possibilities for theorising. For example, a new mother may join a local parent toddler group which can be related to her life stage (parenthood) and place (wanting to meet other parents in the area). She may simultaneously be a member of a Single parent action network (a community of interest campaigning for action) and a Green party. Here place, interest and life-stage intersect to create a fluid constellation of bonds. Whilst political affiliation may be life long, other groupings (toddler group) may be more temporal.

Having explored how community as place making, or sense of community, as seen in psychological and sociological paradigms, a key theme seems to hinge on not only how people experience the community, but how participation occurs. In understanding communities, not only do we need to see structures and types of communities, but we need to understand how humans bond, connect and participate in communities. A useful way of doing this is through communities of practice. As noted above, *how* participation occurs in communities can relate to very real effects. To understand participatory trajectories within communities, in the next section, we turn to explore communities of practice (Lave & Wenger, 1991; Wenger, 1998a). The notion of access to participation within communities is shown to be central to processes of social inclusion and exclusion.

Communities of practice

> As we define enterprises and engage in their pursuit together, we interact with each other and with the world and we tune our relations with each other and with the world accordingly. Over time, this collective learning results in practices that reflect both the pursuit of our enterprises and the attendant social relations. These practices are thus the property of a kind of community created over time by the sustained pursuit of a shared enterprise. It makes sense, therefore, to call these kinds of communities, communities of practice. (Wenger, 1998a, p. 45)

The identity of the person who originally coined the term ‘Communities of Practice’ is unclear (Wenger, 1990) but the term first appeared in the seminal work of Jean Lave and Etienne Wenger: “Situated Learning and Legitimate Peripheral Participation” (Lave & Wenger, 1991). Using the idea of ‘legitimate peripheral participation’, they described how novice apprentices developed expertise by engaging legitimately in practices of the community and how their learning trajectory typically involved moving gradually from simple, peripheral tasks to more involved activities that were central to the community. This theory of learning within its localised apprenticeships was then further extended by Wenger (1998a) to develop a more generalised socially-situated theory of learning. In terms of understanding communities, communities of practice provides a flexible framework for exploring learning, participatory trajectories, identities and social change initiatives within group contexts. Its versatility and adaptability for exploring diverse communities is evidenced by its expansive adoption across a range of disciplines including, among many others, education (e.g. Bathmaker & Avis, 2006), community psychology (e.g. Lawthom, 2010), healthcare (e.g. Davis, 2006), women’s studies (e.g. Paechter, 2003) and sexuality (Whelan, 2009).

A community of practice is defined as a group of people uniting to mutually engage in a joint enterprise, who together develop and share a common repertoire of resources (Wenger, 1998a). A community of practice therefore requires three key dimensions: mutual engagement, shared repertoire and a joint enterprise (Wenger, 1998a). The notion of ‘mutual engagement’ describes the interpersonal relations that emerge from, and are negotiated through, the communal activities of the community. Wenger (1998) uses the term ‘joint enterprise’ to describe the negotiated processes that create relations of mutual accountability between community members, and to describe the shared activities that structure and lend coherence to the activities of the group. The final element of the tripartite definition, ‘shared repertoire’, incorporates the “routines, words, tools, ways of doing things, stories, gestures, symbols, genres, actions, or concepts that the community has produced or adopted in the course of its existence, and which have become part of its practice” (Wenger, 1998a, p. 83).

Each of the three defining elements of a community of practice are, therefore, intimately bound up with the notion of ‘practice’. Indeed, it is this connection with practice that distinguishes communities of practice from other notions of ‘community’. In light of the sociological theories of community outlined above, it is worth briefly clarifying how communities of practice distinguish themselves from other notions of belonging and togetherness. Wenger (1998a) clarifies that a community of practice does not exist merely as a consequence of members sharing geographical proximity – the notion of community within community of practice moves distinctly beyond the idea of community as merely concerned with members belonging to a shared space. Neither is a community of practice solely concerned with the interpersonal relations of community members, in the way that some sociological theories consider the term. Indeed, a community of practice explicitly differentiates itself from definitions of community that are constructed purely in terms of interpersonal networks. It is expressly “not defined merely by who knows whom or who talks with whom in a network of interpersonal relations through which information flows” (Wenger, 1998a, p. 74). Rather, a community of practice "exists because it produces a shared practice as members engage in a collective process of learning" (Wenger, 1998b, p.4).

Before considering the potential of communities of practice to explore community engagement and processes, and with particular reference to the idea of inclusive constructions of community, it is first worth briefly outlining the ethical-political motivation that drove the development of the framework. The genesis of the communities of practice framework lies partly in the desire to avoid perpetuating processes of social exclusion:

> I began by arguing the importance of exploring a social rather than psychological theory of learning, motivated in part by a concern not to add blame for "failure to learn in school" to other burdens of social marginality. (Lave, 1996, p. 161)

Rejecting traditional psychological theories that situated learning inside individual heads, or modelled isolated learning trajectories as mirrored patterns of artificially intelligent computer programs, Lave and Wenger explored learning within its social context. As Lave describes the motivation behind this conceptual shift, her deliberate attempt to avoid the conceptual reproduction of social marginalities becomes apparent:

> It seems imperative to explore ways of understanding learning that do not naturalize and underwrite divisions of social inequality in our society. (Lave, 1996, p. 149)

The situated nature of learning described by the communities of practice framework also challenges the traditional supremacy attributed to academic learning and appreciates the knowledge of ordinary people in everyday contexts (Hammersley, 2005). In this respect, it clearly aligns with the principles of community psychology, which also recognise the expertise and value of people over their own experiences in their own contexts (Lawthom, in press).

This ethical-political motivation is sometimes overlooked, or overshadowed by the extensive deployment of the communities of practice framework in explicitly commercial contexts. However, there is also a considerable body of research that continues the tradition of employing communities of practice to explore and overcome the boundaries of social marginality. An example of research employing communities of practice in a project oriented towards social transformation is the No Outsiders project (DePalma, 2009). Taking its name from a phrase in a 2004 speech by Archbishop Desmond Tutu: "Everyone is an insider; there are no outsiders – whatever their beliefs, whatever their colour, gender or sexuality".

The project involved primary classroom teachers and university researchers working together to tackle homophobia and heteronormativity in primary schools. It specifically aimed to collapse the "traditional binaries between teaching and reflection, academia and activism, researchers and research participants" (DePalma, 2009, p. 3). While the project itself involved traversing various communities (teacher professional communities, academic research communities, school communities and so on), the framework of communities of practice was invoked to underpin the creation and development of a research community that could support primary teachers in challenging heteronormativity.

The No Outsiders research team drew on communities of practice to explore the transformative potential of community engagement (DePalma, 2009). Critical of Wenger's over-emphasis on the reproductive nature of practice and learning within the communities of practice model, DePalma (2009) describes how the framework can also be utilised to explore participation in communities that are oriented towards social transformation and change. Central to DePalma's analysis of the No Outsiders initiative is Wenger's description of the processes of participation and reification.

Participation, within a communities of practice framework, refers both to the engagement with community practices and to the interpersonal relationships that are negotiated through this engagement. Complementing this conception of participation, Wenger describes the process of reification, which involves the creation of a meaning that becomes independent of its creators. The continual interplay between reification and participation described by the communities of practice model was highlighted during the course of the No Outsiders project. At different time points during the course of the project, the research team strategically adopted various reified policies and discourses as they tailored their presentations to align with a variety of audiences – to academic audiences they often employed discourses founded on queer theory, for example, while the authoritative discourse of governmental policy was typically invoked to enlist support from professional primary school teachers (DePalma, 2009).

A communities of practice framework, therefore, permits an identification and exploration of the complementary processes of participation and reification that are negotiated over time through engagement with the practices of particular communities. The strategic deployment of reifications across community practices was shown to mediate processes of social inclusion.

Participation is a crucial aspect of the communities of practice model, and, as outlined earlier, Lave and Wenger employ the term 'legitimate peripheral participation' to describe the learning of novices of a community. Peripherality, in this view, can be either empowering (when a novice progresses to full participation in the community), or disempowering (when the novice is prevented from participating more fully in the community) (Lave & Wenger, 1991, p. 36). This focus on participation has clear resonances with conceptualisations of inclusive and exclusive strategies of community engagement; identifying available participatory trajectories of community members permits an identification of the practices that foster or suppress inclusion and community cohesion. This, in turn, can open up opportunities for transforming oppressive practices. Indeed, this analytic promise of communities of practice was realised in a study that explored the trajectories of further education trainee lecturers in the UK (Bathmaker & Avis, 2005). Rather than trainee teachers navigating from legitimate peripheral participation to full membership of the further education teaching community, as is expected in the communities of practice model, Bathmaker and Avis (2005) found that the newcomers were repeatedly marginalised by their new community. This power of the communities of practice framework to identify these diverse trajectories can therefore contribute to an elaboration of the processes of inclusion and exclusion that are defined and shaped by community practices.

CONCLUSIONS AND INCLUSIONS

The domain of conceptualising communities is notoriously contested. Historical perspectives from psychology and sociology exhibit conflicting trends towards delineating groups of people by geospatial locations, shared relational networks, common interests or some combination of these.

Given the multifarious theories of community and their differential adoption and rejection across disciplinary divides, it seems unlikely that a single, consensual definition will ever emerge. Rather than pursue this potentially endless quest for an all-encompassing definitive theory of community then, we have argued instead for the strategic deployment of a communities of practice framework (Wenger, 1998a). Communities of practice offers an understanding of the various participatory trajectories mobilised within group settings where people are actively engaged in the pursuit and negotiation of common activities.

The communities of practice framework, describes how these participatory trajectories are structured and facilitated by particular group practices that can promote or inhibit inclusion. We invoked an example from an inclusive initiative in primary schools where the communities of practice model, was employed to understand and elaborate the different positions and practices adopted by various members of the research project. The identification and elaboration of these positions and practices using a communities of practice framework served to highlight the utility of operationalising the model within groups specifically oriented towards positive social change. The example from the teacher training programme showed how transgressions from the expected participatory trajectories afforded by the model can help isolate and elucidate exclusionary practices.

It is important to understand the socio-historical context of various definitions of community, and also to acknowledge the Global North bias of many existing theories (Grech, 2010) Understanding various conceptions can inform and further current notions of community by avoiding the academic reproduction of social marginality and by extending the conceptual boundaries of community. However, when considering the inclusive or exclusive nature of communities, the exigency of arriving at an absolute definition of the term ‘community’ seems to fade. Instead, we need to shift the focus towards understanding the participative trajectories and group practices that contribute to, or inhibit, group cohesion and social inclusion. Communities of practice can contribute to our understanding of these inclusive or exclusive processes.

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CHAPTER 2

COMMUNITY DEVELOPMENT'S RADICAL AGENDA

Social justice and environmental sustainability

Community development is founded on principles of social justice and environmental sustainability. Its process, although often a practical response to immediate issues, involves popular education, learning to question the everyday taken-for-granted contradictions that are woven through our everyday lives. Out of these altered perspectives on life emerges a more critical awareness, and this gives rise to the confidence, autonomy and insight to act collectively together to improve the quality of life for everyone. For practitioners, this calls for an analysis of power, the generation of theory in action, and the organisation of collective action from neighbourhood to global levels with the purpose of creating inclusive communities in a more inclusive world. Social divisions are greater than ever, both within and between countries, as neoliberal globalisation extends its reach, beaming a free market principle based on a profit imperative across the world. At the same time, community development's commitment to social change is being distracted under a smokescreen of managerialism, as our transformative concepts become diluted and our practice becomes embedded in policy as improved service delivery. Meanwhile the world faces escalating humanitarian and environmental crises. This chapter is based on the hope and optimism that we can easily and readily reclaim our radical potential if we identify the spaces for creating critical dissent dialogue as a basis for vigilant practice for a fair and just democracy, a world built on respect for all people and the earth itself.

Community development clings boldly and unambiguously to principles of social justice and environmental justice in a world in which, paradoxically, we face escalating crises created by social divisions and environmental degradation. These are witnessed in the form of widening inequalities cleaved by poverty and privilege, not only increasing the divide between rich and poor countries, but creating strange anomalies, such as escalating social divisions in rich, western countries which give rise to persistent generations of poverty. For example, in the UK, child poverty continues at a rate of one in every three children, despite government policy that committed to halving this rate by 2010, and ending it by 2020, and global child poverty continues at 1:2. In relation to environmental

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sustainability, rising sea levels as global warming causes the polar ice caps to melt threatens all forms of life on earth, not only posing questions of how to deal with countries and coastlines disappearing below sea level, but creating unstable weather conditions and changing weather patterns in the short term. For example, localised flooding caused by excessive rainfall or hurricanes (tropical cyclones) has caused damage and loss of life in local communities from Madeira to Cumbria to New Orleans, and is forecast to increase in intensity as global warming progresses. And, on a scale larger than the combined impact of the Indian Ocean tsunami (2004), the Kashmir earthquake (2005) and the Haiti earthquake (2010), the heavy monsoon rains which gave rise to flooding in Pakistan in July 2010, continue to affect the lives of an estimated 20 million people, most of them women and children, months after the event (UNICEF, 2010; www.direct.gov.uk). In these ways, we begin to see how social justice and environmental sustainability are inextricably linked.

These are important points to understand at the outset of this chapter for a number of reasons. Firstly, it is impossible to practise community development without situating communities within the wider context of our times. This calls for an analysis of power if we are to begin to understand disempowerment and the way that lives are differently constructed according to poverty and privilege. By questioning power, we begin to discover ways in which the personal is political and the local is global. Secondly, it is only possible to develop the critical approach to practice that this calls for if we generate theory in action, and action from theory, creating an ongoing praxis, a unity of theory and practice. Without this, we have a dangerous "actionless thought" and "thoughtless action" (Johnston, cited in Shaw, 2004, p. 26) dichotomy which cannot achieve social change, nor engage with such transformative concepts as *participation* and *inclusion.* When the transformative potential of concepts such as these is not fully understood, there is a danger that they become mainstreamed and diluted, and our practice does not hold up to scrutiny. If we claim to be working to principles of social justice, environmental justice and collective well-being, we need to be able to evidence this in our thinking and action. Otherwise, our practice is based on a false premise: claiming to be emancipatory while, in reality, doing quite the opposite. In this respect, Cooke and Kothari (2001) name *participation* the 'new tyranny' emphasising that key concepts reduced to buzzwords reduce transformative practice into serving the interests of the powerful by maintaining the status quo. *Participation*, far from a feel good factor that involves touching the surface of community life, is a key concept in the foundation of participatory democracy, a worldview in which communities are inclusive, healthy and flourishing; in which local people have control over the decision-making processes that affect their lives. My third point is that community development is about collective action for social change. Practice falls short of its potential for change if we fail to organise collectively, following through from issue to project, and from projects to campaigns, networks and alliances which reach beyond the boundary of individual communities to harness collective energy and span multiple issues of justice and sustainability, gathering momentum as a movement for change.

Working with these three points in mind, towards a more specific working model, let us move on to explore the ways in which they are interlinked in relation to practice. Transformative change for a world that is cooperative, diverse, equal and flourishing calls for an understanding of the interrelatedness of the core components of our practice, and with this intention I am going to begin my exploration in the widest context for our work, that of globalisation.[1]

GLOBALISED TIMES

Globalisation is not new; it provided the foundations for empire and slavery. But while the beginnings of globalisation are rooted in colonialism and the drive for wealth and power by European nations, the last three decades have seen that process accelerate, influenced by new technology, the power of multinational corporations and the free-trade agendas of neoliberalism. It is vital for community development that we understand the impact that this process is having on the social justice and environmental justice agendas. We are witnessing the systematic destruction of indigenous cultures founded on biodiversity, the increased polarisation of poverty and privilege, both within and between countries, as well as widespread environmental degradation, destroying natural habitats and depleting natural resources Some of the main areas I have in mind are deforestation, non-renewable energy sources (coal, petroleum, natural gas), air pollution, ozone depletion and marine destruction. Some of this can be attributed to population increase that is creating too many people for the planet to sustain, but much is due to cultures that encourage individualism, which in turn gives rise to irresponsible levels of consumption without any collective responsibility for the well-being of humanity and the natural world. The result is extreme forms of alienation and fragmentation, a crisis of ecological and ethical balance. I want to emphasise here that globalisation is not simply about economic domination, but it carries more sinister implications.

> Neoliberal globalization is not simply economic domination of the world but also the imposition of a monolithic thought … that consolidates vertical forms of difference and prohibits the public from imagining diversity in egalitarian, horizontal terms. Capitalism, imperialism, monoculturalism, patriarchy, white supremacism and the domination of biodiversity have coalesced under the current form of globalization ….
> (Fisher and Ponniah, 2003, p. 10)

This comment from Fisher and Ponniah is important in the way that it addresses the power of the public imagination. Attitudes of superiority and inferiority based on social difference become embedded in popular consciousness, justifying why some people are worth more than others. The notion that western culture is influencing other cultures worldwide, not only with technological progress (*modernisation*), but also with western ideology (*westernisation)* is important in understanding how ideas are transmitted. In fact, the link between technological progress and embedded western values raises questions about the destruction of diverse world cultures in the name of progress. This is why Fisher and Ponniah (2003) claim that the competitive western worldview is not only destructive because it is driven by a profit imperative, but it also embodies political, cultural, racial, patriarchal, heterosexual, ecological and epistemological attitudes. Understanding the way in which Gramsci developed insight into the concept of hegemony by discerning the difference between power asserted by coercion and power through ideological persuasion is relevant here. Traditional Marxism defined hegemony as coercion, the way in which the state exercised control through the law, the police and the armed forces. Gramsci extended this understanding by identifying the way in which dominant ideology as a form of ideological persuasion permeates our lives through the institutions of civil society – the family, schools, religious organisations and all other community groupings, "the entire complex of practical and theoretical activities with which the ruling class not only justifies and maintains its dominance, but manages to win the active consent of those over whom it rules" (Gramsci, 1986, p. 244). Foucault extends this insight into the transmission of ideas to the micro-relations of everyday life, embedded in discourse, not only words but practices – educational, scientific, religious, legal. Power, in this sense, "must be analyzed as something which circulates … never localized here or there [but] is employed and exercised through a net-like organization" (Foucault, 1980, p. 98). So, as we look into different ideas about power, we begin to see how Fisher and Ponniah's claim makes sense, that discriminatory attitudes permeate life itself, that "power comes from everywhere, from above and from below; … inextricably implicated in micro relations of domination and resistance" (McLaren, 2009, p. 72). The result is an increasingly divided world. In the west, individualism has replaced collective responsibility with self-interest, consequently poverty is escalating in rich countries as well as in the developing world. Seabrook refers to the Western poor as the "dead souls of democracy": "the US and Europe have performed a vanishing trick on their own poor [and] … this makes poor people harder to see in the rest of the world as well" (Seabrook, 2003, p. 10). This issue of the invisibility of poor people the world over is obscuring the reality of an increasingly divided world.

McLaren and Jaramillo identify "a central antagonism of the current historical moment [as] that of empire": in the name of global democracy, the "transnational ruling elite is being afforded a rite of passage to scourge the earth of its natural resources while besieging the working-class, women, children and people of color" (2007, p. 63). They use Hurricane Katrina, and the human catastrophe that ensued, as an example of 'race', class and gender warfare in the US today, challenging that, post-Katrina, fundamental questions about democracy have not been raised. Giroux highlights this escalating *politics of disposability* as a product of neoliberal times, times in which "market fundamentalism elevates profits over human need" (Giroux, 2006a, p. 85). The politics of disposability is a concept central to any anti-discriminatory practice, capturing the way in which some lives are seen as 'disposable' according to their centrality to the economy as producers and consumers. Giroux problematises the racist dimensions of the 'politics of disposability': a pair of Black feet with cardboard 'shoes' held in place by rubber bands is photographed on the front cover of his book (2006a). The image that it creates defies the belief that it could capture life in the USA today. This reification of the market as a tangible force that is somehow separate from people, social justice and democracy justifies the ranked importance of some lives over others. The unproductive are considered expendable and a drain on public resources; investment in the public collective good is 'dismissed as bad business' (Giroux, 2006b). Giroux warns that these are 'dark times' in which our struggles should challenge *war* as a political act in the name of *peace* and *markets* as a measure of *democracy*.

In relation to becoming critical in our approaches to community development, it is necessary to grapple with concepts of hegemony, or the way that power is asserted by some groups over others, and counter-hegemony as our understanding of globalisation deepens. Counter-hegemonic globalisation is a form of resistance to hegemonic globalisation. It reaches from grassroots participation through networks and alliances in movement for change for justice at a global level and is committed to countering the impact of globalisation (Borg and Mayo, 2006). My suggestion at this point is that an inclusive, anti-discriminatory approach to practice cannot justify attending to the local, and overlooking global forces of oppression. Unregulated markets, a free-market economy and globalisation do nothing to protect the natural world and the most vulnerable people of the world from the drive of capitalism to produce at lowest cost and maximum profit. Evidence of this can be witnessed in the example of deforestation: the depletion of the tropical rainforests to meet the high economic demand from the West for timber and meat has trapped indigenous farmers into not only destroying their own futures, but also destroying major ecosystems which ultimately threatens the future of the entire planet. Encouragingly, we are seeing signs of a counter-hegemonic movement. We could certainly see the fair trade movement and the local economies movement as gathering momentum and significance. Another such example is the International Forum on Globalisation (IFG), an alliance of North-South activists, economists, scholars and researchers who analyse and critique the cultural, social, political and environmental impacts of economic globalisation. This Forum was formed in 1994 from concerned people who perceived that we have been led into a period of historic change more significant than any since the Industrial Revolution without discussion of the liberal, free-trade principles which have been promoted by powerful bodies such as the World Trade Organization (WTO), the IMF, the World Bank, the North American Free Trade Agreement (NAFTA), the latter of which united the USA, Canada and Mexico in 1994 forming the largest intergovernmental agreement to remove trade barriers (trade bloc) in the world in terms of purchasing power parity. The IFG aimed to stimulate new thinking, collective action and popular education about this changing state of world affairs. Vandana Shiva, a director of the IFG, offers an eco-feminist perspective on the urgency for a global analysis of local practice:

> As the globalization project unfolds, it exposes its bankruptcy at the philosophical, political, ecological and economic levels. The bankruptcy of the dominant world order is leading to social, ecological, political and economic non-sustainability, with societies, ecosystems, and economies disintegrating and breaking down. (Vandana Shiva, quoted in Fisher & Ponniah, 2003, p. 1)

Today, the IFG offers community development a global connection for action on climate justice and social justice, providing information and organising campaigns with a local-global reach that contribute to a climate justice movement. Challenging the rhetoric of the World Bank claims that free trade and poverty alleviation work in partnership, their position is that the benefits of globalisation continue to go to the few, not the many. Their visioin is to promote equitable, democratic and ecologically sustainable economies (www.ifg.org).

Ecological thought emphasises biodiversity and the way that indigenous cultures have evolved in balance with their natural environments. Cultural diversity is essential for biological diversity, and local economic development as a local-global movement offers alternatives for the future that reflect values other than consumer lifestyles.

> In relation to the interface of social justice and environmental justice, Crescy Cannan emphasises that the environmental crisis is not only a crisis for us all, but it disproportionately affects both the poor and the South, and so 'intensifies forms of inequality and threatens collective goods – thus it is a human crisis as well as a threat to the entire planet'. (Cannan, 2000, p. 365)

At this point, I want to dig a little more deeply under the surface to explore specific evidence related to social divisions.

THE WORLD'S CHILDREN AS A MEASURE OF SOCIAL DIVISIONS

Reification of the market within neoliberalism has raised the profit imperative above wellbeing as a measure of success.

> The true measure of a nation's standing is how well it attends to its children – their health and safety, their material security, their education and socialization, and their sense of being loved, valued, and included in the families and societies into which they are born. (UNICEF, 2007, p. 1)

I do not think any of us would argue differently, yet UNICEF, in its report *State of the world's children 2005: Childhood under threat* (2005), provides evidence that more than one billion children, one in every two children in the world, are denied the healthy and protected upbringing defined by the Convention on the Rights of the Child (1989), and are reduced to growing up in poverty. We begin to uncover strange anomalies, a worldview that prioritises profit for the few at the expense of the wellbeing of the many. This is clearly a choice that profit is more important than justice, if we take justice to mean responsibility for a common good.

The strange phenomenon of child poverty in rich countries is even more startling. A UNICEF report on childhood in industrialised countries, produced in February 2007 (available at www.unicef.org.uk), ranked the UK at the bottom of 21 countries on an overall measure of child well-being based on six dimensions: material well-being, health and safety, education, peer and family relations, behaviours and risks, and young people's own subjective sense of their own well-being. Within these six dimensions, 40 separate indicators of child well-being were developed. It seems that in the UK we are creating conditions for generations of unhappy children who are denied their full potential in life when there is no apparent need. Child poverty in the UK remains hidden beneath the surface of prosperity, and justice remains blinkered.

Asking ourselves 'Who is poor in the UK?', we uncover an even more disturbing insight. Child poverty targets those from minority ethnic families. Whereas 30% of all children are growing up in poverty, a different picture emerges when we look at ethnicity: 27% of White children are growing up in poverty, whereas this figure escalates to 36% Indian, 41% Black Caribbean, 56% Black non-Caribbean and 69% Pakistani and Bangladeshi children, based on 2006/07 statistics (CPAG, 2008).

> Until politics engages effectively with the wider struggle against racism, it is impossible for the demands of social justice to be met. (Craig et al, 2008, p. 245)

Similarly, 'dis'abled children or those with a 'dis'abled parent are much more at risk of poverty, inadequate housing and social exclusion from public and community services (Flaherty et al., 2004). In addition to this, we begin to see anomalous concentrations of poverty. For instance, London, with a thriving economy that has generated 620,000 jobs in the past 10 years, has a child poverty rate of 39% (Oppenheim, 2007). We know that poverty creates ill health and premature death; in the UK, children of those in the bottom social class are five times more likely to die from an accident and 15 times more likely to die in a house fire than those in upper social classes (Flaherty et al., 2004). So you begin to see that by digging beneath the surface, we begin to make more critical connections that provide us with a complex picture of the interlinking dimensions of poverty. The correlation between unemployment, poor mental health, homelessness, school exclusions, children in care/leaving care and high levels of youth suicide add further depth to that picture (Howarth et al., 1999). This is not only a profound social injustice, but its cost to society as a whole is immense, creating generations of unhappy, unhealthy children who are denied their full potential.

> Children who are poor are not a homogeneous group, although they are often represented as being so. Their experiences of being poor will be mediated by, among other things, their age, gender, ethnicity, health and whether or not they are 'dis'abled. In addition, children will interpret their experiences of poverty in the context of a diverse range of social, geographical and cultural settings. (Ridge, 2004, p. 5)

Since the Blair government's commitment to halve child poverty by 2010 and end child poverty by 2020, we have seen rafts of policy changes under the banner of Every Child Matters aimed at reducing family and child poverty, yet nothing is making a difference. Similar issues are mirrored on the world stage. In 1999, the World Bank and IMF took a new approach to reducing poverty in which, in just the same way as the Blair government, participation in civil society was key, and the poor became written in as players in their own transformation. In other words, rights have become tangled up with responsibilities to such a degree that responsibility for social justice is being laid at the feet of those who are victims of an unjust system. Kane (2008, p. 197), in a critique of these developments, cites Arundhati Roy's comments that while the World Bank policies are now written in "socially just, politically democratic-sounding language … they use language to mask their intent … the language of dissent has been co-opted" (Roy, 2004, p. 74). This last point, the co-option of the language of dissent, is vital to understanding the struggle for participatory democracy. Laying the responsibility for poverty at the feet of the victims of injustice has nothing to do with lessening the divide between the poor and the privileged, and we are deluded if we think differently. We need to get our thinking inside the links between distributive justice and cultural justice, so that gender and 'race' are understood in relation to the traditional class struggle, not as competing with it, but as interacting with it to continue to privilege Whiteness and maleness (Lister, 2008). Killeen (2008) challenges poverty as a human rights issue. His argument is that the demonisation of the *undeserving poor* under Thatcherism which led to policies that simultaneously increased poverty and prosperity has had such a hold on popular opinion, carrying an enduring message that poor people do not deserve to be lifted out of poverty, that it has led to reluctance on the part of the UK government to redistribute wealth back to pre-Thatcher levels, despite the overwhelming evidence of the impact social inequalities have on health and well-being (Wilkinson & Pickett, 2006, 2009; WHO/CSDH, 2008). The ingrained nature of public attitudes to poverty combined with the reluctance of government to risk becoming unpopular by adopting redistributive policies, in Killeen's analysis, has given rise to *povertyism,* a form of discrimination which denigrates poor people. This constitutes a violation of human rights if considered against the UN Declaration of Human Rights which addresses the foundation of freedom, justice and peace in the world, and which calls for states to meet their responsibility to provide for their citizens. (Killeen, 2008). Since the crisis of capitalism in 2008, inequalities are being further exacerbated by a world recession that is hitting the poorest hardest, and widening divisions even further.

THEORY IN ACTION AND ACTION AS THEORY

Community development has an eclectic theory base. In other words, there is no one theory that informs our practice, but there are many theories that influence our understanding of power and so inform our anti-discriminatory approach to practice. Some of those that I have in mind are Gramsci, Foucault, feminism, Black feminism and eco-feminism, extending our understanding of the complexity of power relations.

Domination and liberation need to be understood in relation to intersecting and overlapping oppressions that include class, 'race' and gender. "Critical theorists begin with the premise that *men and women are essentially unfree and inhabit a world rife with contradictions and asymmetries of power and privilege*" (McLaren, 2009, p. 61, emphasis in original). As critical educators we seek theories that are dialectical, that locate the individual as one who both creates and is created by society, to the extent that it is impossible to understand one without the other. In this way, "critical theory helps us focus *simultaneously on both sides of a social contradiction*" (McLaren, 2009, p. 61, emphasis in original). By focusing on this idea, you can see that any site of domination is also a site of liberation, and it is by understanding the nature of power that we are able to transform it into empowerment.

Becoming critical in our approach to practice involves questioning the ideas that construct everyday lives. Ontology, or a theory of being, is the way we see ourselves in relation to the world around us, helping us to make sense of why we live life as we do and how we give meaning and purpose to our lives, the way we act in the world. Epistemology, influenced by our ontological perspective, is a theory of knowledge, or making sense of the world that is informed by particular values. So, if dominant attitudes persuade us to see the world in terms of a natural order of superiority and inferiority, we are likely to make sense of our lives according to a *common sense* that makes no sense at all, one full of contradictions that escape our notice. Questioning the nature of everyday life is the beginning of this process; it leads us to different ways of knowing, and in turn, to different ways of being. In these ways, epistemologies and ontologies are part of a living theory, or practical theory that evolves from everyday life in order to transform the way things are for the better. Theory and practice become synthesised into praxis as we create theory as part of life itself. The process of becoming critical has inner and outer dimensions; as Judi Marshall (2001) puts it, we need to use both inner and outer arcs of attention. Inner reflection allows us to reach levels of critical reflexivity, to reflect on our reflections in order to get deeper insights. This inner criticality is in symbiotic relationship with our outer perceptions, continually questioning and exploring meanings, possibilities and purpose in relation to life experience. The outer process of consciousness is explored in groups where an issue, or in Freirean terms a ‘generative theme’, a situation from everyday life that will generate a passionate response out of everyday apathy, is the focus of dialogue. This can be done effectively through the use of stories about life experiences, but must always be carried out in a context of trust, respect and confidentiality. It is our responsibility to maintain a culture of respect in a world that often rewards disrespect. Conscientisation, or the processing of becoming critical, deepens through this practice and forms the basis for determining action.

A worldview is a paradigm for framing the way we collectively see the world, the way we think about the world and the values that inform this perspective. These ideas have a profound influence on the way we act out our everyday lives. The roots of critical consciousness lie in questioning taken-for-grantedness, the unquestioning acceptance of the way life is. So, by questioning the ideas implicit in a western worldview, which work on class, cultural, ethnic, religious, racial, gendered, sexual and many other social differences, we begin to identify the structural roots of discrimination. Our identities, a sense of who we are in the world, are formed within this complex, interconnected hierarchy of poverty and privilege. But a worldview is not fixed. As Reason (2002, p. 4) says:

> The worldview of a culture changes from time to time … worldviews are not simply rational things, they are about the mood of the times, the metaphors we use without knowing we are using them, the spirit of the times.

In terms of change, the latter part of the 20th century brought more than could have been imagined prior to this. I have in mind, not only the impact of the technological revolution on world-wide, immediate communication, but absolutes have been dismantled before our eyes, and in this I include such iconic examples as the Soviet Union, the Berlin Wall, Apartheid in South Africa with Nelson Mandela freed after 27 years' imprisonment to become president and world peacemaker, and more recently the 'twin towers' at the World Trade Center in New York, which prompted the West's 'war on terror'. The illusion of stability in the West has now been replaced by instability, exacerbated by the 2008 banking crisis that triggered the global recession. Boundaries of nation states no longer offer any protection from global phenomena, and issues such as HIV/AIDS and climate change place social and environmental justice at our feet, rather than distant and in someone else's backyard. Global justice is now a preoccupation of governments, non-governmental organisations (NGO) and people in general, particularly young people who are moving towards adulthood with very different views of the world (Piachaud, 2008). Social justice is increasingly becoming embedded in policy at national and global levels. For instance, the World Health Organization (WHO)/Commission on Social Determinants of Health (CSDH) (2008) call for closing the health gap in a generation, saying:

> Social and economic policies have a determining impact on whether a child can grow and develop to its full potential and live a flourishing life, or whether its life will be blighted. Increasingly the nature of the health problems rich and poor countries have to solve are converging … reducing health inequities is … an ethical imperative. Social injustice is killing people on a grand scale. (CSDH, 2008)

My overriding theme, in exploring the political context in which community development takes place, has been that our western worldview is in a period of crisis, challenge and change. The Enlightenment, the philosophy that developed in Western Europe in the 17th and 18th centuries with its emphasis on an objective, rational, unemotional, scientific knowledge embedded in masculinity, has formed the basis of our ways of making sense of the world by seeking a single, scientific truth. As the social and political theorist John Gray comments:

> To attempt to prescribe for a recovery from Western nihilism is merely another form of Western humanist hubris. We can nevertheless discern a few of the steps we need to take, if we are to have any chance of opening a path through the ruins in whose shadows we presently live. (Gray, 2007, pp. 268-269)

Our worldview in crisis offers an opportunity to explore different ways of seeing the world that create better possibilities, but for this to happen we need to embrace the notion of critical praxis, a unity of theory and practice.

CRITICAL PRAXIS

Becoming critical, in Ira Shor's words, involves "extraordinarily re-experiencing the ordinary" by teaching teaching people to question answers, rather than answer questions (Shor, 1992, p. 122). From the time we come into the world, we absorb a way of making sense of what is around us to such a degree that we take it for granted, and cease to see the contradictions acted out in everyday life. Our lived experience invades the very essence of our being, and we do not spontaneously see the world in a critical light unless something triggers our consciousness. Only then do we begin to question what we have previously accepted unquestioningly. A *problematising* or problem-posing approach involves identifying everyday contradictory aspects of life that capture issues of discrimination, and representing these in a decontextualised way in a form that will invite curiosity (Freire, 1972). This is a codification, and can be captured in photograph, drawing, drama, story or many other art forms. In the process of *de-coding* (analysing the codifications), the animator encourages a community group to question what is happening. Hope and Timmel (1984, p. 58) identify six stages that lead to critical consciousness, and I have added one more based on the importance of insight into connected knowing as a way of hearing the truths of others, simply meaning that in dialogue we suspend our own truth to listen from the heart to the truths of others as an essential component of working with difference/diversity (Belenky, 1997).

SEVEN STAGES TO BECOMING CRITICAL

Description: what do you see? What is happening? Where is it happening?
First analysis: why is this happening? – ‘why’ questions move the process from observation to thinking
Connected knowing: how is this experienced differently by different people?
Real life: once the group in immersed in the issue, the next level is elicited by asking, does this happen in real life? Who is affected? In what way?
Related problems: if it seems appropriate, the next stage is to move laterally to related, connected issues – what does this lead to?
Root causes: this reaches out to much deeper connections with structural discrimination at the heart of critical consciousness – what are the causes/what has created this situation?
Action planning: what can we do about it?

Fig. 1. Seven stages to becoming critical [developed from Hope and Timmel (1984)]

Through this simple form of problematising, the initial attention to the codification begins to change focus to group discussion of the wider issue rather than the specific ‘code’. The key to the success of this method is that the issue is relevant to the lives of the people concerned and will generate from its relevance to their lives, the curiosity necessary for questioning. Listening respectfully, from the heart, to personal stories builds trust. The group share more deeply, and begin to empathise with different experiences and different ways of seeing the world. Empathy builds. Through dialogue, a more critical analysis of the political dimensions of personal stories emerges. As critical consciousness develops, a paradigm shift takes place, dislocating the dominant way of seeing the world, and re-visioning what is desirable and possible. The world we know changes when we see it in a different light; we engage with it in a different way. But transformation is active not passive; it calls for us to examine old ways of knowing in order to explore new ways of knowing. Cycles of thinking and doing only become transformative when participants are fully engaged in the process; they see the need for transformation, and actively work together to bring about change for a happier, healthier and flourishing world.

However, the process of conscientisation is not liberating until it becomes a collective process. As Paulo Freire puts it:

> Liberating education is a social process of illumination …. Even when you individually feel yourself most free, if this feeling is not a social feeling, if you are not able to use your recent freedom to help others to be free by transforming the totality of society, then you are exercising only an individualist attitude towards empowerment or freedom. (Freire, in Shor & Freire, 1987, p. 109)

Changed awareness of the injustice of existing conditions is sufficient to empower a collective movement for change, but this cannot be left fluid and intuitive. Fay suggests that our goal can only be achieved when "all three phases of the tripartite process of enlightenment, empowerment and emancipation are completed" (Fay, 1987, p. 29). I am impressed with the way that he structures this into a 'complex of theories which are systematically related' (Fay, 1987, p. 31):

I A theory of false consciousness

a) This needs to explain how people's understandings of their life experience are incomplete or contradictory;
b) it also needs to explain how people accept these understandings without question;
c) at the same time as offering alternatives that makes greater sense.

II A theory of crisis

d) This needs to spell out the nature of a social crisis;
e) this evidence is substantiated by such statistical analyses as child poverty, its class, 'race' and gender connections, and the resulting social divisions that threaten not only social cohesion, but the future stability of the world, and the way in which has become embedded into the existing social order;
f) a historical account of how both false consciousness and the structural forms of discrimination came into being is also necessary, and we trace this with the help of theories of power.

III A theory of education

g) This needs to offer insight into the educational context necessary for critical consciousness;
h) and it also needs to identify the approaches, skills and methods needed for critical pedagogy.

IV A theory of transformative action
i) This needs to focus on the particular aspects of society that need to be changed in the current context;
j) there must be a strategic plan of action that at very least identifies the catalyst for social transformation, for example Gramsci's concept of *the intellectuals*.

Fig. 2. Model of inter-related theories for transformative change (adapted from the basic structure offered by Fay, 1987, pp. 31-32)

Fay suggests that it is only when these four theories, together with their sub-theories, are consistently interrelated that there is a structure capable of explaining, criticising and mobilising for transformative change.

I would like you to consider this framework offered by Fay in relation to the critical approach to community development that I have threaded through this chapter. Here, I summarise the essence of this approach:

> Transformative change begins in the stories of everyday lives. Every stage of the process is framed within an ideology of equality, founded on values of mutual respect, dignity, trust, mutuality …. Through the diversity of practical projects that are developed in mutual partnership with local people in response to immediate issues, there is a strong educational element threaded through: teaching to question the taken-for-grantedness of everyday life involves questioning answers rather than answering questions. This process of becoming critical, or *conscientisation*, involves re-experiencing the ordinary as extraordinary, and a tool for this is problematising. Problematising involves decontextualising relevant everyday situations, capturing them in story, drawing, photograph, drama or any other. In a community group, the animator supports people to question the representation by posing: What do you see here? Do you recognise where this is? What is happening and to whom? Why? As the process unfolds, the questioning turns from the representation to focus on group experience that is relevant to the focus. In dialogue, a respectful form of communication that calls for suspended truth, the taken-for-grantedness of everyday life is dismantled and the contradictions exposed, the political construction of local lives becomes apparent, and the personal is seen as political. At a relevant stage of this development, attention will be focused on action: what are we going to do about it? Praxis is the essence of this approach: the way that theories of power inform the purpose of community development engages local people in examining their own reality, developing practical theories that are context-specific. At a relevant point, thinking engages with action. This cyclic process of action and reflection is the essence of critical praxis. Whilst theories of power and false consciousness will prompt the seeking of evidence of discrimination, from that point on, local practice develops an ongoing research project of its own, generating practical theory in action, engaging educationally with local people in critical pedagogy – a search for a critical consciousness of the everyday. Emancipatory action research is the glue that binds community development theory and action into a unity of praxis. It is an approach to action research which:

- aspires to an ideology of equality, informed by values of dignity, respect, mutuality, reciprocity, compassion, conviviality;
- adopts a methodology that is collaborative and so attempts to identify and change power relations within its process, is rooted in dialogue, attempts to work *with* not *on* people, and intends that its process should be empowering for all involved;
- Its methods are grounded in everyday narratives, giving voice to silenced voices, and being open to ways of knowing that extend beyond the intellectual. For example, it uses self-reflexivity and dialogue, but may also use story, music, drama, poetry, drawings, photographs, and any other medium that gives rise to different ways of knowing.
- It is overtly committed to transformative change, and as part of its process changes the way we see the world**.**

Changed epistemologies lead to changed ontologies: seeing the world differently results in a changed engagement with the world. A worldview based on competition, exploitation and inequality gradually becomes informed by a new possibility, a world based on equality and diversity, cooperation and general human and environmental flourishing – a participatory worldview. This is where collective action fits into the process: a changed way of seeing the world gives rise to the confidence to act together to bring about change. This action needs to operate in all contexts from local to global, but of course we cannot all be involved in action at all levels and so strategically engaging with others in alliances and networks connects people at all levels in all contexts.

Finally, I want to emphasise the cyclic nature of action and reflection as a process that continuously flows from grassroots to global movements for change. It is essential that the process is seen as a continuous cycle that flows back and forth in order to connect local action with global change. This is how community development can contribute to a movement towards participatory democracy, "opening a path through the ruins in whose shadows we presently live" (Gray, 2007, pp. 268-269). Creating critical dissent dialogue is the key to the possibility of a new world, once which is built on the fundamental principles of a respectful ecosystem in harmonious balance with life on earth. And, as Mae Shaw says, "an open culture of debate is one of the best ways to protect community development and democracy" (Shaw, 2004, p. 28).

A TRANSFORMATIVE MODEL FOR CHANGE

In conclusion, I suggest that the key components (Ledwith & Springett, 2009) of such an approach can be seen in the following model:

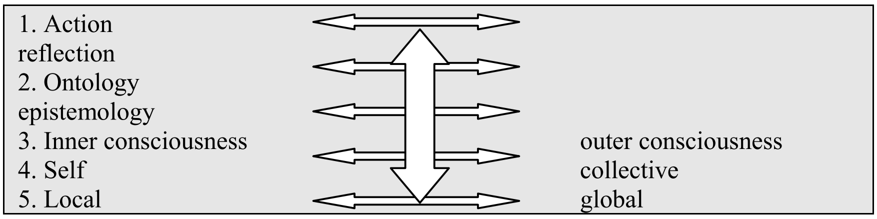

Fig. 3. Key components of transformative model for change

Contained in this model are five related key components. Each pair operates on a continuum, and is only relevant in combination, as indicated by the horizontal arrows. In addition, each of these components is only relevant in relation to the dynamic interconnected whole, as indicated by the vertical arrow. The interconnectedness of the whole is vital to the process of change. This is a symbiotic whole, and it is these core dimensions of critical practice, in dynamic interaction, that provide the potential for transformation. Without this synthesis, that potential is fragmented. Constant feedback between all dimensions of the whole, in cyclic interaction, keeps practice relevant to its changing contexts. It is this cyclic action/reflection process that sustains the ongoing process of change, offering community development the potential to keep its promise to social justice and environmental sustainability.

The collective process presents a real challenge to practitioners in an age of individualism in which hope is so easily turned to hopelessness, in which fragmented lives become alienated from the whole, and in which self interest is elevated over the need for a flourishing and cooperative world where the well-being of the many is our prime purpose. Unless we find ways to connect the self to the project, the project to the community, the community to alliances and alliances to movements for change, we will fail in our transformative intention.

> Education, or the act of knowing as Freire calls it, is an ongoing research programme into aspects of people’s experience and its relationship to wider social, economic and political factors. (Kirkwood, 1991, p. 103)

The optimistic note that I want to end on is to remind you that the beginning of this complex process lies in simply listening from the heart to the stories of everyday lives. This notion of beginning in experience reveals multiple truths and different ways of knowing. We begin to rewrite our stories with new insight – Black feminist thought emerged from the particular realities of Black women’s lives and the interlocking, intersecting inequalities that get reproduced as a complex web of oppressions related to ‘race’, class and gender that result in marginalisation from knowledge production (Ramazanoglu & Holland, 2002, p. 70). Rewriting our stories from reclaimed identities is important, for “in changing the story we change the world” (Ledwith & Springett, 2009, p. 221).

NOTES

[i] The core ideas in this chapter are developed from Ledwith, M. & Springett, J. (2009). *Participatory practice: Community-based action for transformative change*, Bristol: The Policy Press. Throughout, I have used 'Black' to signify my generic, political use of non-White, and 'race' and 'dis'ability to indicate the social construction of these concepts.

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ANDREW AZZOPARDI

CHAPTER 3

SPACES FOR INCLUSIVE COMMUNITIES

Reflections on contemporary society

MAIN DISCOURSES AROUND COMMUNITY

Locating the debates around community is no easy task. The main discourses around community are countless (Mills, 2006). This chapter will weave what I consider to be some of the most significant, focal and complex debates that will contribute to the problematizing of discourses around community and its development.

Naturally, an 'inclusive community' does not entail erasing variety that society is endowed with, more so, it implies that all groups within the community and all individuals gather around a critical notion, namely inclusiveness.

There are some important initial questions we need to engage with to further examine community, explicitly:

- How do we conceptualise community?
- What are useful concepts in trying to understand communities?
- How is the term community used in every day dealings?
- Writings on community are in abundance, but are we strengthening our understanding of such a complex, mostly unpacked thesis?

Whereas there are a number of compound discourses that are associated with the idea of community, a particularly important premise is that communities are interconnected. Others claim that community in its own right is a value. The qualities we think construct communities are brought together by treatises ranging from membership to proprietorship, from reliability to citizen's interaction in multiple and mutually reinforcing contexts.

Much has been written but maybe the two major notions that bequeath our thinking on the understanding of community are; *gesellschaft* (whereby the citizen is largely cut off) thus representing co-location but minimal attachment and *gemeinschaft* (whereby the citizen is weaved into a network of relationships and family support) which tends to represent tighter and more assimilated social grouping (Jorgensen, Bird, Heyhoe, Russell, & Savvas, 1997; Bauman, 2001).

A. Azzopardi and S. Grech (eds.), Inclusive Communities: A Critical Reader, 41–54.

> Being alive as human beings means that we are constantly engaged in the pursuit of enterprises of all kinds, from ensuring our physical survival to seeking the most lofty pleasures. As we define these enterprises and engage in their pursuit together, we interact with each other and with the world and we tune our relations with each other and with the world accordingly. In other words we learn.
>
> Over time, this collective learning results in practices that reflect both the pursuit of our enterprises and the attendant social relations. These practices are thus the property of a kind of community created over time by the sustained pursuit of a shared enterprise. It makes sense, therefore to call these kinds of communities, *communities of practice.* (Wenger 1998, p. 45, emphasis in original)

- What are the ingredients that will construct a community of understanding (Bauman, 2001)?
- In what way do we make our communities function?

The term citizenship implies engaging with one's community through economic involvement, public service, and other efforts to augment the quality of life *for all*. An elementary principle in such community development is 'authentic dialogue';

> But the word is more than just an instrument which makes dialogue possible; accordingly, we must seek its constitutive elements. Within the word we find two dimensions, reflection and action, in such radical interaction that if one is sacrificed – even in part – the other immediately suffers. There is no true word that is not at the same time a praxis. Thus, to speak a true word is to transform the world. (Freire, 1972)

BONDS OF COMMUNITY

The perception is that the promises of community are forged because we share a common project, rooted in a universal outlook that we can pursue together.

- But is this conception founded on today's values, outlooks and lifestyles?
- Do we still want to make our neighbourhood a more alluring place to live in?
- Do we still want to share faith?
- Do we still believe that our societies are constructed around the communal?

Effectively, true community engagement is essentially about including citizens.

> Community is one of the most difficult, complex, and ambiguous words in our language. It is a contested concept, one that represents or gathers to it contradictory, mutually exclusive images, meanings sacred and profane by turn. (Carey, 1997, p. 1)

Community is made to represent the provincial life we have been trying to undo. We are attempting to create new community clusters and at the same time struggling with ways to enshrine new contexts (Bauman, 2001). In actual fact, communities incessantly negotiate identity and who and what belongs in a community remains a complex debate to entangle. The boundaries of a community are not only physical but also symbolic, in that they represent social distinctions and divisions affected by an assortment of factors, events and social conditions (Twelvetrees, 2002). The response to all of this is that:

> community development is like life itself, a constant attempt to keep aspirations and achievements within sight of each other. The community developer who stays with the problem and the people seems to be moving up a spiral. At times it seems as if everyone is back where they started, but at each turn, everyone should be at a higher level of abstraction, in theoretical terms, and in a better position to solve their own problems in their own way, in practical terms. (Lotz, 2008, p. 39)

Boundaries mark the beginning and instantaneously the end of a community, the notion of 'space' and location come into play (Satterthwaite, Watts, & Piper, 2008). We can speak of symbolic boundaries of a community that relate to community identity and definition, power of community, culture(s) of community, and residents' attachment to and identification with community:

> The boundary encapsulates the identity of the community and, like the identity of the individual, is called into being by the exigencies of social interaction. (Cohen, 1985, pp. 12-13)

Although community is a morally charged understanding of human collective life, its deepest driving force is derived from human beings' essential needs of endurance, enlargement and performance. Countless citizens are concerned about the state of civil society some bordering on moral panic (Thompson, 1999), even because community understanding has been mistakenly injected with an inventory of objectives and common goals, shared thinking and a mélange of pooled values. Community allows for people by protecting its members from events that are identified as threats and allowing them to efficiently obtain and manage resources, while human morality evolves. When one talks *community*, one is also contending *context*.

> it is during the process of people thinking, discussing, and deciding on what they really want, and then planning, organising and acting together to implement the decisions they have reached that, at one and the same time, they both develop more fully their potentialities as people *and* promote changes for the better in the environment in which they live. (Batten, 2008, p. 57)

CONCEPTUALISING COMMUNITY AROUND THE COMMUNITY DEVELOPMENT DISCOURSE

Locating the boundaries depends on the ability to conceptualise terms and typologies. Community development models, to my understanding, need to be weighed up within the following processes; community action, community empowerment, standard of living and quality of life (Satterthwaite, Watts, & Piper, 2008).

The way people lived in the ancient Greek times, was possibly the first hint at citizenship (Hay, Lister, & Marsh, 2006). Citizenship was not separated from the individual person's private life. All that happened was profoundly inter-related into one's everyday life in the polis. Aristotle famously expressed: "To take no part in the running of the community's affairs is to be either a beast or a god!" Citizenship was founded on obligations towards the community (even if community had a different way of being represented). ‘They’ and the ‘Polis’ was one and the same – their own existence was intersected with the community. The citizens always interpreted responsibility to the community as an opportunity to be honourable. So much has/is been said and done and today we speak of important conversations that are taking place all over to try and decipher the complexities that engage our communities (Shaw & Martin, 2008). Community development draws from dialogues that have been representing the debates we have seen unfolding, some leading to milestone documentation and global positions, that are in my estimation hardly ever taken up seriously (or interpreted to be p/Politic rhetoric) (Twelvetrees, 2002).

> There are inherent tensions here, with differing theoretical perspectives on the balances to be struck between the claims of identity, identity politics and locality versus the interests of solidarity, building progressive alliances within and between communities and wider movements for social justice, both locally and beyond. (Mayo, 2008, p. 17)

Community development is a paradigm with a long tradition and draws from a variety of social sciences (Craig, Popple, & Shaw, 2008). The richness and calibre of this concept lies in its ability to bring diverse components into one organic whole and develop communalism from the local to the global. Community Development has since focused on the study of social change within the context of wider processes of formal, informal and non-formal education gained from an interdisciplinary mindset (Ledwith, 2005). Developing identities and positive changes in community and social regeneration is the consequence and upshot (Craig, Popple, & Shaw, 2008). Ontologically speaking, the re-conceptualisation of social justice, the establishment of new communities and environmental sustainability are imperative elements in the construction of hearty societies (Illich, 1973).

> A realistic approach to community development takes into account the frailties of people – and this includes community developers. Utopian thinking and blindness to the difficulties that come with working with real people rather than with abstract beings has been one weakness of community development in the past. (Lotz, 2008, p. 43)

Community development is initiated around civil society, namely, voluntary organizations and local regeneration projects. It is designed to focus on the challenges facing families, neighbourhoods and communities, and the opportunity to reflect on how to regenerate positive and upbeat dynamics. The ultimate objective is to bring about positive social transformations (Ledwith, 2005). Community development will only swell when citizens are prepared to provide an experience in its own right rather than as an adjunct. It is a thinking and tangible process designed to promote improved living conditions and active engagement (Mayo, 2008). Epistemologically, it provides wide-ranging, varied pathways and an avenue for practitioners and policy-makers to develop their expertise in this invigorating area of academic scrutiny. Community Workers/Developers, NGO Staff and Volunteers, Civil Society Organisations (CSO) Staff and Volunteers, Social, Environmental and Political Activists, Popular Educators, Local Council Employees, Social Cooperative Members, Cultural and Social Operators, Policy Makers, Fair Trade advocates, Politicians (Local and National), Community Health Workers and Community Leaders/Opinion Makers are all proponents at the forefront of this complex debate come activity (potentially activism) (Ledwith, 2005). The increasing professionalisation of NGOs at an activist, social movement and operational level can therefore become a breeding ground for change and transformations:

> Essentially, the NGO movement is a product of the community and it should plant seeds of endogenous and durable development in the basic communities. It is imperative that NGOs participate in the prevention of conflicts and the creation of a culture of peace. NGO members must understand and must make the community understand the true causes of conflicts. (Nungwa Kuzwe, 2008, p. 279)

Community activism has spread widely especially amongst minorities, emarginated and discriminated groups (Ledwith, 2005). This phenomenon has generated a need to perceive community development not as an automatic development of ideas and notions but as an active engagement and of filling the social induced gaps generated by the majority communities (Lotz, 2008).

Informal consultation with activists and policy-makers in the social field is to take place recurrently in the active development of communities (Dixon, 2008). They are to develop the following handiness; defining, locating and interpreting community, sussing out proficiency in the way each social category relates to its community, understanding the key lifespan stages, able to locate the individual within the composite of society, adept to understand the discourses encapsulating community affairs, comprehend the interaction between a person and the environment, recognise the value of resiliency as opposed to weakness and pathology, examine ecological systems holistically, recognise the demand for local empowerment and the importance of cultural relativity and diversity (Mills, 2003).

> Community work is too often drawn into the latest fashions of government policy agendas because that is where the funding is, rather than developing and maintaining a clear analysis to inform action …. Government now provides a community development employment base which is fragmented, short-term and insecure with the result that practice is dominated by the policy and political context rather than creating it. (Craig in Shaw, 2004, p. 42)

In sum, I make out community to be a normative, ideal conception of human collective life, (whether place-bound or not), which refers to communal ties that are distinct from other associational connections (Geertz, 1973).

CONTESTING COMMUNITY

> My overall feeling is one of sadness that so much community development effort has, on the whole, resulted in relatively so little actual betterment and more especially for the poor and underprivileged people who need betterment most. (Batten, 2008, p. 55)

We are in fact shifting from a context dominated by what was previously related to do-gooders, that is community members involved in giving a helping hand (what was closely related to social work) to a new conceptualisation of community as a social regeneration agenda with economy, governance and sustainable development as strong and decisive ingredients (Twelvetress, 2002).

The belief is that the welfare state arose from the social democratic and liberal mind-set to articulate social responsibility for collective needs, namely, well-being, education and collapsed family units (Craig, Popple, & Shaw, 2008). Yet, despite regular processes of social reform, improved social services and enhanced benefits, this 'state' has been criticised as not always being approachable, democratic and effective in fostering inclusion.

> Instead of shutting out what is different, we should welcome it because it is different and through its difference will make a richer content of life … (Follett, 1918, p. 40)

Social operators have consequently developed initiatives to meet the imperative of help for the casualties of the economic system and truly helping is one of the loops in effective governance and active citizenship.

PARTAKING IN COMMUNITY

Sustainability has been in the past deeply rooted in the built environment but is in all truth inherently holistic reaching across environmental, social and economic domains (Reason, 2002). Although both industry and government in *principle* acknowledge the need to develop a more sustainable approach in their operations, to my understanding it is proving to be a slower process to be achieved in *practice*.

The way I see it, the emphasis has to shift towards the responsibilisation of neighbourhoods with enforcement becoming more 'citizen-focused and citizen-friendly' (Berner & Philips, 2008).

> Critical connections like this provide us with a complex picture of the interlinking dimensions of poverty which target some social groups much more than others. The correlation between unemployment, poor mental health, homelessness, school exclusions, children in care/leaving care and the escalation in youth suicide are important critical connections for community development (Howarth et al., 1999). So too is the connection between increasing concentrations of poverty on council housing estates (Page, 2000) as well as the gendered and racialised dimensions of child poverty which link to growing up in lone-parent families and in families of non-white ethnicity, compounded by ill-health and low income (Gordon et al., 2000). We must be concerned, both in terms of its profound injustice and its cost to society as a whole. (Ledwith, 2007)

Communities need to demonstrate how human well-being is dependent upon ecosystems, and identify barriers and drivers that prevent marginalized groups and communities from accessing these ecosystem services in a sustainable manner to improve their well-being, in essence avoiding poverty. Social and economic imbalances are manifest in poverty and social exclusion. Policy responses to remove these barriers and discuss intervention strategies would allow the poor to improve their well-being with a particular focus on improving their advocacy and social learning. Poverty and social exclusion have always been contestable concepts that drive our society (Rahman, 2008).

Global influences on national social policy emerge strong social structures and large-scale social positions if we understand the sustainable patterns and processes of development (Reason, 2002).

Development must go hand-in-hand with the fulfilment of human needs without exploiting and abusing the resources available. Going beyond the notion of profit can take communities at a deeper understanding. Dialogue, partnership, transparency and respect are the fundamental concepts that emerge from the social economy (Giroux & Mclaren, 1989). These discourses promote attitudes and value systems that influence ethical behaviour by developing competencies and capacity-building that will enable people to participate as active and informed citizens in the development of communities within an ecological sustainable and socially just society.

These action groups, which developed their agenda through diverse methods, research, street protests, campaigning and so on have all had a very important role in developing the human rights agenda we speak so effortlessly about now-a-days (Loney, 2008; Lotz, 2008).

> Social scientists have concentrated primarily on the ways in which movements have been forces of political change – changes in laws, legislation, voting patterns, government institutions, and so on. (Reed, 2005, p. xvii)

We have been greatly influenced by these movements and their leaders and we owe much of our social stability, firmness and constancy to them and their vision. Track the transformations at the way political science has interpreted these changes and we will develop a political educational framework that will converge the strength of top-down politics and its engagement to resistance (Multiculturalism, Islam-Christian divide, LGBT [lesbian, gay, bisexual and transgender], feminism, youth deviance, disability, social-class, gender, delinquency). Ours is a dynamic community with complex phenomenon within an intricacy of networks, beliefs and social systems (Bauman, 2001).

Communities need to identify partners who will work interdependently with them to create a sustainable community that will not exploit them. Community leaders have struggled with integrating businesses and other organizations into community place building, otherwise known as establishing sense-of-place. Communities similarly may lack the skill and epistemology in strategic planning to attain success that links the environment, social and economic dimensions of sustainable development.

This chapter ultimately purports a progression to inclusion and this process rests upon fundamental principles of membership, relationships and supports within a wider discourse of connections, valued roles and social networks (Cox, 2005; Mani, 2005). Community inclusion necessitates a multifaceted tactic, via a broader policy response. Achieving inclusion is inherently problematic because it challenges the very way in which society is structured (competitiveness) and organized (meritocracy) (Mani, 2005).

The central features of communities should include; a flourishing economic base, an agenda constructed on long-term commitment that is not dominated by dependent forms of development, engaged social operators, a healthy voluntary sector, accountability, good quality governance, an articulate civil society, a solid social capital and the creation of a sense of place and space.

> New forms of "social capital" – just as important as money in the bank – are developing among working families in both urban and suburban environments. (Bookman, 2004, p. 19)

The characteristics of an unsustainable community would comprise a vulnerable, insecure, short-term and divisive agenda, long-term passive and dependent citizens, non-effective political communities, lack of community engagement, low levels of voluntary activity, closed, unaccountable systems of governance and citizens hooked on parochialism.

Lately, the focus of public policy seems to be shifting away from direct government intervention towards a new vision constructed around the creation, identification, and mobilization of active communities and citizens who are able to take greater responsibility for addressing their own socio-economic well-being and quality of life issues. This new approach stands for an extension of communitarian ideas whereby communities represent the essential capacity building-blocks of social harmony and progress.

> (C)apacity building is an approach to development rather than a set of discrete or pre-packaged interventions. So while there are certain basic capacities (social, economic, political and practical) on which development depends, Oxfam seeks to support organisations working for sustainable social justice. (Eade, 1997, p. 3)

The new logic is that 'more developed communities and communities with more capacity are safer and healthier places to live in'. The opposite is also true in that dependent communities are, by definition, unable to take responsibility for themselves or the environment around them and often contribute to their own socio-economic woes. This new emphasis on community-focused citizenship has profound implications for the form and character of local governance and the planning process. It potentially establishes new relationships between State agencies and communities (Twelvetrees, 2002).

> Community development has always had a radical agenda (Ledwith, 2005). By this, I mean that our practice is inspired by a vision of social and environmental justice. It is fundamentally committed to bring about social change which contributes to this end. So, our practice starts in people's everyday lives, 'extraordinarily re-experiencing the ordinary' (Shor, 1992 p.122). This calls for a critical approach – situating local practice within the wider political picture. In other words, unless we have an analysis of power, of the structures of oppression in the world that reach into our local communities and impact on personal lives, our practice is likely to be tokenistic at best. (Ledwith, 2007)

High-quality strategies call for the following; the value of social justice needs to be enmeshed within fundamental institutional reform, strategic policy, analytical capacity, political congruence and alignment, integrated decision-making, ecosystem management, political will and most definitely leadership in the community engagement agenda:

> Active citizenship should be defined more broadly to encompass active learning for political literacy and empowerment, addressing structures and relations of power and working to change these, where necessary, in the pursuit of social inclusion and social justice agendas. (Lister, 1997)

PUTTING COMMUNITY IN ORDER

Governance in popular (or should I say populist) literature has also been erroneously equated with Government. Governance until now may have been primarily defined as the business of boards of directors, commission members, trustees – call them what you may! Governance is an important concept – this is an accepted fact by most. During the past 25 years, in Malta we have witnessed strong political pressures to reduce government's reach and shift responsibilities for public policy rendition to non-governmental entities. At a time when devolution and privatization have made government and non-profit organizations ever more interdependent, we must question the adequacy of this distinction.

> With these forms of governance, central governments have redefined their roles from direct intervention to steering society to reach collective goals (Pierre & Peters, 2001). Definitions of governance emphasize different components within it. For example, Pierre (2005) defines it as "the process and mechanisms through which significant and resource-full actors coordinate their actions and resources in the pursuit of collectively defined objectives" (p. 452) (Fontan et al., 2009, p. 834)

In reality, the boundaries between non-profit and public Governance are increasingly fluid and overlapping and our understanding has to be informed to sanction such a relationship. The strength of any nation is being challenged by a number of factors. The increased volatility has deprived the State of much of its traditional capacity to govern our community – engaging the plebs is of importance to ensure that change lies in the grassroots (Satterthwaite, Watts, & Piper, 2008).

> Furthermore, achieving policy goals is dependent on collaboration among multiple players whose interests and responsibilities intersect in a fluid and contingent way. This last aspect is important, because it implies that governance can be understood as relationships that are in flux, that are not stagnant, and do not necessarily rely exclusively on permanent, externally defined structures. (Fontan et al., 2009, p. 834)

The central issue for Governance is how voluntary-membership networks can be enticed to create enough social power and motivation to bring about publicly significant results for the local citizenry and to solve problems and mitigate the necessary transformations (Craig, Popple, & Shaw, 2008). Community depends on good Governance, namely; broad debate, decision-making opportunities, management of community resources, adequate use of public space – all blended within a discourse of civil rights, liberties and responsibilities (Mills, 2006).

Governance is effectively based on two principles; firstly 'continuity' and secondly 'negotiated shared resolve'. Governance refers to a *new* process of ascendancy and a *changed* condition of ordered rule. Governance is broader than government. Changing the boundaries of the State entails that public, private and voluntary functions and positioning became momentarily fluid and at times possibly opaque until we get used to a new way of doing things (Ledwith, 2005).

Naturally, governance requires economic and social justice (Bauman, 2001). But, what are the dominant definitions of social and economic justice that have been transformed from equality to equivalence and then to equity/difference. We have been accompanied by a movement for the creation of government to a notion of governance which is more efficient and translucent.

> Governance can be understood as a process of negotiation and interaction between organizations and not only as formal participatory structures. (Fontan et al., 2009, p. 846)

A large part of the impetus for the reinvention of government has come from developed countries with mature democracies, and hence it has taken for granted the existence of strong and established democratic institutions and processes. The thematic issues highlighted include subsidiarity and the function of the voluntary sector in the formulation and operationalization of policy approaches:

> It concerns steering and coordination, particularly related to the allocation of resources rather than on direct decision making by a centralized body … this local governance, as well as the other types of governance, implies social transactions between organizations that do not necessarily share the same interest and the same resources. (Fontan et al., 2009, p. 846)

THE IMPACT OF STATE AND COMMUNITY ENGAGEMENT

> What, then, might have been standing in the way of well-designed evaluations of the impact of public involvement? As we will describe in more detail, public involvement is in general justified on two grounds – procedural and substantive. The procedural strand claims involvement as a fundamental civil right whose benefits derive from the application of due process in reaching public decisions. Civil rights of this type do not require empirical justification, although they can be investigated empirically to determine their practical application. However, the substantive strand does make a number of claims about the tangible benefits flowing from involvement and these could in principle be investigated empirically. (Burton, Goodlad, & Croft, 2006, p. 296)

An increasingly complex State-Community relationship is being detected:

> We believe people should be involved in deciding how their town or city develops. We will only achieve real, sustainable change if local people are in the driving seat from the start, tailoring strategies to local needs. (DETR, 2000, p. 6)

Governance, in this day and age, is required as it gives greater attention to the links between public-administration and the public interest – until some time ago between the two there seems to have been a glitch. With the expeditious changes that are affecting and transforming our communities together with the complexity of community, maximising engagement of the citizens is decisive (Satterthwaite, Watts, & Piper, 2008).

Social operators, community leaders and social activists should be prominent in policy-making and development whilst the State's primary role is to focus on policy co-ordination (moving away from policy-control). But this discourse raises important questions (and a few eyebrows) about the challenge of Governance to State power and related questions of self-governing.

The theory and practice of citizenship and differing interpretations of the role, rights and duties of citizens, issues of nationality and national identity, the impact of globalization are at the forefront of this complex debate. A society that is committed to the notions of community development is a community that sustains itself on citizen participation. The notion of community commands increased participation in formal politics, alignment of learning which is connected to political concerns, combating powerlessness in such processes, learning to promote shared values and strong community and rebound national leadership (Sztompka, 1993; Ledwith, 2005).

> If children and young people are to develop a notion of citizenship as inclusive, it is crucial that issues of identity and diversity are addressed explicitly – but getting the pedagogical approach right will be critical: the process of dialogue and communication must be central to pedagogical strategies for Citizenship. (Turner, 2007)

CONNECTING THE DOTS

Community does not exist in perfect harmony and integration, but in conflicts and competition. Communal life, or community, persists even in what is being referred to as individualized modern society, and differs from other forms of human group life. The core matter of community development is that it embraces divergence as it leads to harmonization – discord becomes a means to an end. Community, as an ideal form of human collective life, must be pursued and pondered for our survival.

> One of the key concepts in social capital is the participation in various networks through family and friends, neighbourhoods and work. Social capital is generated through these networks and associations. (Partington, 2005, p. 244)

Community may be seen as a homogenizing entity (Craig, Popple, & Shaw, 2008). In attempting to rationalise the roles and functions within community we require the following; expand negotiation skills, document analysis, learn reflection and critical engagement (Gramsci, 1971). Essentially community is about planning the entry, in other words construing the structure of a community profile (within a critical framework), proficiency in the location of the varied roles and functions and enhanced indulgence when planning entry in a conflict setting (Darder, Boltando, & Torres, 2003). As Putnam puts it:

> To be sure, not all political activity deserves the label "virtuous" or contributes to the commonweal. "A steady recognition and pursuit of the public good at the expense of all purely individual and private ends" seems close to the core of the meaning of civic virtue …. Citizens in a civic community, though not selfless saints, regard the public domain as more than a battleground for pursuing personal interest (1993, p. 88, quoting Skinner, 1984)

The whole notion behind community development is to track the infrastructure and thought processes that go with the development of a/the community. We need to connect the complex issues that envelop community and reflect how in this day and age the politicising of individuals through community education is becoming a device for the propagation of society:

> The communities of which these individuals are a part will also benefit from the greater and denser social ties and connections that are established through greater involvement and which then serve as infrastructure (or social capital)for further positive social relations. A further benefit is seen in the enhanced collective self-confidence and in the wider recognition that problems which might not be amenable to individual solution can be tackled through collective action. (Burton, Goodlad, & Croft, 2006, p. 301)

Engagement makes us more confident and in charge of our lives, more able to contribute to our local community and to assimilate within social and cultural activities as an illustration of citizenship (Lotz, 2008). Community has been associated with learners engaged in establishing effective public participation and participatory processes:

> We believe that if children and young people are to develop a notion of citizenship as inclusive, it is crucial that issues of identity and diversity are addressed explicitly. Inherent in the relationship between the citizen and society is the role that identity, or a sense of belonging plays within this relationship. This is because the motivation for citizens to participate in society is logically predicated on a sense of belonging, or 'identification' with, the context where they are participating. We advocate that an understanding of issues of identity and diversity in the context of citizenship is best approached through a political and historical lens. (Ajegbo Report, 2007, p. 95)

Even so, citizens, that live in the same geographical location or share the same interests is only one way to interpret the notion of community. The feeling of identity and common membership is not necessarily based on traditional, conventional and time-honoured social bonds (Willmott, 1987):

> If we have chosen the position in life in which we can most of all work for mankind, no burdens can bow us down, because they are sacrifices for the benefit of all; then we shall experience no petty, limited, selfish joy, but our happiness will belong to millions, our deeds will live on quietly but perpetually at work, and over our ashes will be shed the hot tears of noble people. (Marx, 1837)

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MARK VICARS

CHAPTER 4

PEOPLE LIKE US

Queering inclusion, rethinking community

INTRODUCTION

> The very notion of community itself implies many appealing features of human relationships – a personal sense of familiarity and safety, feelings of self-worth and vitality, actions of mutual concern and support, and appreciation for one's personality. (Barnet & Fallon, 2009, p. 3)

Throughout my childhood and into my adolescence, I became accustomed to not making sense. Having a growing awareness of not being straight enough, involved me rethinking 'I' in relation to the wider communities in which I sought belonging. I am conscious how I am/was often perceived as being "too gay" which invariably means being "too queeny", "too flamboyant", "too camp": "too visible". The "too much" rhetoric habitually performs the disciplining rituals of a heterosexualising culture and discourse, one in which " the widespread notion that heterosexuality is normal and that everything that is not heterosexual is somehow aberrant …" (Tierney, 1997, p. 39).

I was increasingly cognizant of the heresy of growing up a sissy boy (Rofes, 1995). Never being that interested in "The three Fs – fighting, fucking and football" (Mac an Ghaill, 1994, p.56) meant keeping a close watch on what I did and said to avoid being vulnerable in a community that valorised essentialised performances of heterogendered masculinity. Disciplined by the panoptic gaze of heteronormativity, a term that describes how heterosexuality, in everyday life, is presumed, institutionalized, normalised and legitimated (Warner, 1983), my refusal to play by heterogendered rules, has meant I have never found belonging easy. I am never quite sure out of which voice 'I' should speak (Hallet, 1999).

In the small northern town where I grew up, there was nothing even vaguely queer with which to connect so I sought out gay themed books and movies and unabashedly bought into the mythic notion of finding a group of people in which I could and would find connection. I fell into longing for a fictional life world populated by 'queer' archetypes: drag queens, leather men, muscle Mary's, bears,

A. Azzopardi and S. Grech (eds.), Inclusive Communities: A Critical Reader, 55–68.

cubs and clones. My nascent imaginings of community were based on my naïve readings of queer emblematic indicators of self, those features or practices of personhood “that serve an identity function or otherwise mark and maintain social boundaries” (Kochner, 1987, p. 220). It is from this “conceptual space [that I locate how] non-place forms of [gay/queer] community can be [productively] understood” (Hoggett, 1997, p. 7).

In this chapter, I draw upon my own and other gay/queer men’s life stories to speak about how heteronormative practices, in everyday life, can create the conditions which silence and performatively exclude sexual differences. Over a period of eight months, I met twice a month for eight months, with an existing friendship group of five middle-adulthood gay men for my PhD research that focused on gay men’s literacy practices in adolescence. As a preliminary interview technique, I drew guidance from the Biographic Narrative Interpretive Method (Chamberlayne et al 2000), and asked the men to *Tell me the story of their reading practices in relation to their life experiences*. Our discussions increasingly became ‘messy affairs as we partook in scurrilous gossip and ‘dished the dirt’ on each other’s queer antics. I soon came to realise that our way of being with each other was being cultivated by our willingness to participate in those habits of being through which we had become and are revealed as gay men. Our narratives, drawing heavily on ‘insider-oriented’ knowledge, became infused with productive relations and inflected with doubled practices as our conversations revolved around what Barton and Hamilton (1998, p. 83) have called “ruling passions”:

> When we went to interview people we wanted to find out about reading, writing and literacy practices. Unfortunately, it seemed the people we interviewed often wanted to talk about something else; each person has a ruling passion … We talked to them about literacy, it seemed, and they talked to us about their lives.

As we drew upon shared frames of meaning to describe our experiences and encounters in ‘straight’ and ‘gay’ communities of practice, we evoked the copious ways we have come to know the fabric of our lives and reflected on the processes of how as individuals we made sense of ourselves in the world. Bellah et al. (1986) writing of the importance of community in everyday life, remind their readers that:

> Stories that make up a tradition contain conceptions of character … But stories are not all exemplary, not all about successes and achievements. A genuine community of memory will also tell painful stories … that sometimes create deeper identities than success. (p. 153)

Having the experience of not belonging to ‘straight’ communities of meaning (Cohen, 1985) made me aware of how social networks, orientated around identity practices, socialise subjects into regimes of practice, in which: “The social productivity of identity is purchased at the price of logic of a hierarchy of normalisation, and exclusion” (Seidman, 1993, p. 130).

Speaking from and out of our lived experiences, we tell of how we have become less concerned with seeking inclusion in hetero worlds and how a ‘queer’ way of being has become one of many possible positionalities from which to critically question “Who am ‘I’ and who are ‘We’? Redefining community which doesn’t include the ‘longing for inclusion’ has meant thinking about how ‘queer’ has contested and problematised belonging in our everyday lives by reconstructing allegiances across communities that are framed, found out and made visible by the doxa of sexual difference (Felski, 1997; Braidotti, 1997). ‘I, ‘us’ and ‘them’ as categories that reify inclusive and exclusive discourses have/ are being troubled by being beside others who resist the mythic narratives and norms of hetero privilege, as being “*beside* comprises a wide range of desiring, identifying, representing, repelling, paralleling, differentiating, rivaling, leaning, twisting, mimicking, withdrawing, attracting, aggressing, warping and other relations” (Sedgwick, 2004, p. 8).

In the retelling of our stories, we collectively recognise and identify how social, cultural and institutional frameworks, such as families, schools, friendships groups, were/ are important in forming an initial sense of self and how these relations put in to motion and continue to propel multiple possibilities of ways of belonging for ‘people like us’.

Once upon a time …

> Building an identity consists of negotiating the meanings of our experience of membership in social communities. The concept of identity serves as a pivot between the social and the individual, so that each can be talked about in terms of the other. (Wenger, 1998, p. 145)

The zeitgeist of my teenage years was dominated by the hysterical moral panic (Cohen, 1972) surrounding the emergence of HIV/ AIDS. It reached a zenith in the early to mid 1980’s with UK newspapers announcing headlines of *“Gay Plague” May Lead to Blood Ban on Homosexuals* (Daily Telegraph, May 2, 1983) and *Alert over “Gay Plague”,* (Daily Mirror, May 2, 1983). In 1986, ex-Chief Constable of Manchester, John Anderton proclaimed “*I see increasing evidence of people swirling about in a human cesspit of their own making ... We must ask why homosexuals freely engage in sodomy and other obnoxious practices, knowing the dangers involved”* (John Anderton in *The Guardian*, 18th December, 1986).

Just when our anxiety couldn’t get any worse, along came Clause 28 of the Local Government Act, a private members bill brought by backbench Conservative Dame Jill Knight that sought to stop local authorities from ‘intentionally promoting homosexuality’ or ‘promoting the teaching in any maintained school of the acceptability of homosexuality as a pretended family relationship’. Our emerging identities as young gay men were played out in relation to these events and experienced within the immediate institutions of home, family and school life. Passing as straight was a tactic we all sought to employ in our endeavours to perform sameness. Growing up believing in the singularity and pathology of homosexuality was a defining experience for all of us:

> As you are growing up the more you realise your attraction is to the same sex the more alarming that knowledge becomes, there is always lurking the thought that you might be found out and that can have a paralysing effect. What did/does it mean to be gay? Well, of course, it means being attracted to other men, and in some respects it means leading a different kind of life. It doesn’t fit in with the normal life cycles of getting a mortgage and having kids, it is I suppose … queer, though I don’t like that

> term because it has historical connotations of abnormality and of being seen as abnormal this is patently not true and therefore not fair. How I am perceived is important. We all need a certain amount of acceptance from people we care about and those we work with, I am not openly gay and I tend to let people draw their own conclusions. I don't confront any anti gay sentiments, unless they are directed at me, being gay is private and I see it in terms of fairness not in terms of honesty and dishonesty. Growing up I felt it just wasn't fair that that I couldn't have all these things that other people had, I felt like I had been short changed. I didn't want a girlfriend I wanted a boyfriend and I wanted one quite badly, partly for all the sex that everyone else was getting but also for a relationship and a friend. John

> I think I said to myself "I am gay" from an incredibly early age…from when I was about eight, I said those words in my head … and believe me picking up on being a poof very early on in life isn't a good thing! Growing up on a council estate, that was a god-forsaken hole in the middle of nowhere, I knew I was being marked as different very early on. When I was 13 and 14 being gay was not the norm, it was not acceptable, it meant you would lead a lonely life, you would be vilified, it wasn't good and you wouldn't be a happy person. Paul

> I want you to imagine this scene: It is a typical Saturday morning; my mum and I are sat at the back of the local bus heading out of the village. She is checking her list making sure nothing has been forgotten for the big shop in Sheffield and I … well, I am tagging along out of boredom. It has been assumed by my parents that on a weekend a fourteen-year-old with nothing better to do should help with the carrying of the copious bags. As the bus snakes around the lanes that border one village from the next I doodle on the juddering condensated windows. I had failed to notice anything remarkable about the blanched middle-aged man boarding the bus. It is only as he makes his way along the aisle and starts to look for a seat amongst the young mums and old age pensioners that I become aware of his presence. He gingerly edges his way around the collapsible buggies, side-steps the tartan shopping bags, avoids being knee-capped by wicker baskets and silently squashes himself into a seat a couple away from ours. It was then my mum leant over and half whispered "That man lives on his own". I think she was trying to say this could be you, go down a different track, I want you to be happy. Throughout the journey I stared at the back of his head and the thought that kept running through my head was how in thirty years time I didn't want to be getting on a bus to hear a mum saying that to her son about me. He journeyed with us for all of five minutes and in that time I had read his life … Once I knew of my gayness for sure I said to myself this could be a bloody hard life. Sam

The perceptions of what a gay life meant for John, Paul and Sam disclose how the impossibility of knowing anything Other than (hetero)normalcy is already a form of power relations (Foucault, 1980). The impossibilities of articulating and acting upon our sexuality was, and still can be, intimately connected to the costly consequences that we felt/feel would be incurred for fracturing the compulsory heterosexual narratives of everyday life (Rich, 1993). However, Crisp (1977) has noted the time comes for everyone to do deliberately what they used to do by mistake. If it is in our conscious, chosen way of being in the world, in our chosen affiliations and practices of self that we start to seek a sense of belonging, then coming out of the closet becomes an act of re-authorising identity and a way of re-making ourselves visible and culturally intelligible.

KNOWING ME/ KNOWING YOU. AHA!

> My skin is a map. A map of my world. My secret world. It tells you where I've been. And how to get to where I come from. It charts my seas my peninsulas my caves and my mountains. I travel with this map over my skin. I go on journeys. Find new coastlines. Hidden borders. (Miller, 1994, p. 321)

I summoned up the courage, at the age of sixteen to tell my parents I was gay. I found how speaking truth about my sexuality had a performative quality. It produced me as an object in relation to those discourses that would rather I remain silent. My father said:

> "You had better go and tell your mother'
>
> As I entered the bedroom, her gnarled fingers misshapen through Rheumatoid Arthritis clutched the heated pad she used to alleviate painful joints. Heavy curtains were blocking out the afternoon sun, she had been prescribed new anti-inflammatory drugs that had aside effect of drying up her tear ducts. Twice daily a pipette containing synthetic natural tears' would lubricate her eye and keep them functioning.
>
> "I've something to tell you".
>
> I inwardly flinched,
>
> "*I think I might be Gay*".
>
> Why did I say 'think'? There was no doubt, in my body, I knew.
>
> "I haven't got a son I've got two daughters … What have I done wrong? … It is wrong; it's in the Bible …. You'd better leave".
>
> The silence between us irrevocably fractured, she turned her face away from where I stood and started to cry. The tears came quite freely now. I abandoned the melodrama that was being played out behind the net drapes of my parent's house and fled, not quite skirts billowing, to the end of the road to catch a bus to a friend's house. Her parents had been informed of this possible scenario and were willing to let me stay until I had got things sorted out. My plan was to move to London and find the life that I hoped was out there waiting for me but would not be found on the streets of this small northern town.
>
> As I was drinking hot sweet tea and re-telling the events that led to my outcast state the telephone began to ring. "It's for you, it's your father". My friend's mother called through to the kitchen where I was still in the process of thawing out from the reaction of my parents. If only I had kept my mouth shut. Nervously, I took hold of the receiver.

> "We have been talking and I'm coming to pick you up".
>
> He began with
>
> "We should talk".
>
> And then…
>
> "*Are you a Queen?*"
>
> I had no idea what he was talking about but could detect from the tone of his voice that whatever it was I had better not be one. As I sat at that Formica topped kitchen table, the gathering place for every important family event I can ever recall, I tried hard to numb myself to the situation, to the disappointment etched on the faces of my parents.

Martel (2003) notes: "Will I be understood when I say that sometimes numbness can hurt? That you don't want to feel because what you feel will be pain, so you try not to feel, and just sit there, immobile, numb, in pain" (p. 40)

> My father stood by the door and waited for me to give him the answer he wanted
>
> "No!"
>
> "How do you know that you are …?"
>
> He avoided saying it.
>
> "Have you had sex with a girl?"
>
> "Yes".
>
> I lied.
>
> "Have you had sex with…?"
>
> He couldn't bring himself to say it, to name me.
>
> "No!"
>
> I lied.

This was the last time my sexuality was ever mentioned. It was tiptoed around as if I had some terminal illness, that if named would rear up and consume us all with one fell blow. The lesson I learnt from my initial revelation was one of how language and discourse "is always productive: It brings a situation into play, enunciates evaluations of the situations and extends action into the future" (Denzin, 1997, p. 37). Looking back, what went and remained unsaid is far more descriptive and meaningful to my interpretation of that situation. I knew through their silence that my parents were holding out for a reversal, for a change of mind. In giving voice to the inside I had created myself as I wanted to be seen and heard. In their silence they were unseating that creation and hoping for an erasure of its possible existence (Vicars, 2003, pp. 24-27).

The coming-out narrative typifies a confessional, transformational journey from subject to object (Foucault, 1978). Unveiling the 'open secret' (Sedgwick, 1990) that there are other, non-heterosexual positions available for identification; it also situates the homo in a relational identity of Other to the hetero (Sumara and Davis, 1998). Paul spoke about how he couldn't bring himself to shatter the expectations of his parents or his friends and how he avoided the subject of sexuality completely:

> At school, I had been inseparable from Penelope and Sophie and, the big joke between my parents and friends of my parents was which one is he going out with? At that time I wasn't very happy. I didn't think I could ever be that visible and when I told her I was gay I made her cry. I never came out to my mum. I loved my mum desperately, The most profound thing that has ever happened to me in my life was the death of my mother. Mum was aware of the men I lived with but they were always 'friends'. Once, a few years back, my ex-lover took my Dad and me out for diner in a very plush Paris restaurant and suddenly from nowhere Dad said "You're gay aren't you?" He said he had always known. I was never very good about coming out. Paul

John spoke of how he has remained distant from his family since his coming–out and illustrates how the coming out story as a 'rite-of-passage' narrative repositions "the relations of the known and the unknown, the explicit and the inexplicit around the homo/heterosexual definition" (Sedgwick, 1990, p. 3).

> I had repeatedly rehearsed my coming out speech but I hadn't consciously decided to come out it just happened because I had drunkenly misinterpreted my Mum's proposal to invite friends back from University. It was Christmas and possibly the worse coming out ever. I had come back for the holidays and my Mum was going on about bringing girls or boys back to visit. I said to myself well she knows and this is her way of letting me know that she knows. I managed to keep my mouth shut until New Years Eve and a couple of Bacardi and cokes later for Dutch courage I took her into my bedroom and said "You know what you said earlier about bringing girls home … well … it's actually boys". I thought great that is that sorted but the next day my Father came into my room and demanded to know what I had said to upset her. Your Mother is in tears, she is really distressed what have you been saying?
>
> He told me to think how about my sister might feel and how other people might react. My sister got really upset and started crying and going on about her friends and that we had to keep it all a secret. I am not as close to my sister as I used to be and that is in part because of her reaction. I realised that despite everything we had been through there were some fundamental differences between us that would never be breached. I have come to a point in my life where I have decided I don't want to know her anymore. I have very little contact or involvement in her life apart from birthday and Christmas Cards and since coming out I have learnt not to share what is happening in any part of my life with any of my family. I could have had a massive row but instead

> I went very quiet and the very next day packed up my stuff and went back to University. I went back home the following Easter and she said she was feeling better about the situation and that I must understand it was her generation. I have become accustomed to living by myself and I never want to have to go back to them and be in a position where I have got to ask them for anything. I think I have always wanted to make my own way in the world and whilst I have learnt that honesty is very important it is also something of a double-edge sword. With three little words I had undone the expectations that had been stored up for me; it was I who had shattered the familiarity of their future. I found myself being looked at as if I were a stranger. John

Sam recalls how growing up in a small mining village in Yorkshire was fundamental to his understanding and experiencing of his homosexuality and how it continues to affect his attitude towards his sexuality:

> Throughout my childhood I would hear men and women in the village talking about the queers, not that they were ever named but it was like
>
> "Ey up! 'Av you heard 'bout …"
>
> It wasn't an everyday thing, at most it happened once, twice, three times a year but I would pick up on things like that and I inched back inside myself. It didn't take me long to work out that the weakest link of all is homosexuality. Homosexuals are outsiders, they don't fit in and they get watched because being different gets equated with being unsafe. It wasn't until I left the village and went away to university that I thought I could live that choice about being open or not. I was doing a teacher training degree in Newcastle and in the press at that time there was a furor about gay teachers being pedophiles. It was 1991 and the College didn't ask the question so you didn't tell. There wasn't much around in terms of what you might now call a positive attitude so? I didn't want to be defined by a certain characteristic, a certain flaw. I didn't want to start my teaching career apologizing for being different and if I had come out I probably wouldn't have made it through the course. Sometimes the people who don't fit in don't get through; they are the teenagers you read about that are found dangling in their bedrooms. Now, twenty years on, being homosexual is not a big thing for me anymore but if you spend a night thinking 'Oh God, this is what I have got for the rest of my life' and you can't equate being yourself with having some kind of inner peace, then that is when you are found swinging the next day. A lot of young people are discovered that way because they can't get through that one bad night. We all have them, that one night when we think I have got to make a break, 'Do I do it or don't do it?' I can't remember exactly when mine was but it happened. My new partner lives in Islington, London which is basically gay central so when I am there I can be more overt. In my home town that would have been perceived to have been as different and different is less than. Sam

In each of the accounts, the connections to the "collective imageries, vocabularies and mythologies" (Strauss, 1995, p. 10) of heteronormalcy, suggest how 'Gay', as a descriptor of identity becomes problematic when pinioned in opposition to the institutional and cultural forces of heterosexuality. Dave recalls how:

> Growing up, I didn't really know what being gay would involve Of course I knew what homosexuality meant and that knowledge was gleaned from snippets of playground conversations and the clichéd, caricatured representations I was watching

> on TV. Much like any other child I conformed to the expectations of those around me. My understanding of who I was and who I am has been shaped by the patterns and standards handed down to me by my parents and through my affiliations to the wider communities in which I sought belonging. It took a while to realise as I was growing up that life was not going to always be what I imagined, that it was going to be different from the countless narratives that I had spun inside of my mind It wasn't until I was nineteen that I first slept with another man I had met at gay club and I knew then that I wanted to continue having sex with men. I was twenty when without hesitation and with surety I first said to myself the words 'I am gay'. I began to get involved in the gay scene in London and started to have regular sexual relations with other men. To a certain extent I was living a double life and at weekends I would whiz off to a gay nightclub or would go to a gay sauna to meet men, it was rarely a relationship, just casual sex. I suppose I was worried about coming out. I just didn't have the confidence to do it as I felt it may have prescribed or affected my friendships that had developed over many years. In a way I thought that being gay was going to limit my lifestyle. I was worried that the heterosexual relationships I had established may disappear and that being in a gay relationship would necessitate breaking off my straight relationships. I was worried that I might have lost those friends so I was making very little attempt to establish gay affiliations of any kind. My lack of relationships was never really commented upon at the time by friends who all in the mid-twenties and were coupling up or getting married. Dave

It has been suggested that: "individuals inherit a particular space within an interlocking set of social relationships; lacking that space, they are nobody, or at best a stranger or an outcast" (MacIntyre, 1981, p. 32), and leaving behind that which we felt could never be reconciled , we fled to cities, seeking sanctuary on the urban gay scene. We went in search of sex in the bars, clubs and saunas and stopped seeking inclusion in hetero communities. We found out Other experiences of connection:

> The only active gay identity I was doing was going to the saunas and disappearing off to gay nightclubs at weekends to meet men for sex. Dave

> It wasn't until I was eighteen that I went to my first gay club and that was because someone who had been cruising me took me to this nightclub and I found all these people partying and having a great time. I was completely amazed. I was gob smacked. It was a huge impact finally getting to meet other gay people. John

QUEER GOINGS-ON

As I started to lie down in the arms of other men, I came to realise sharing the same label did not always mean sharing the same set of desires. I became increasingly troubled by those people who were unwilling or felt unable to identify themselves as 'gay' or 'lesbian' and realised that a gay politics based solely on sexual identity was in itself a minoritising movement. As I began to question the logic of a language that had created the conditions of a liminal existence, there emerged a doubt in the political value of embodying readymade identities and I realised, as Wolcott (2000) has pointed out, that, "labels tend to put people in boxes from which it can be impossible to escape" (p. 44). I had been convinced that as an out gay man, my presence offered a resistant cultural location from which to mount political interventions in everyday constructions of social reality. However, I soon came to realise how lurking behind a relational identity category would only ever reproduce the conditions of experiencing homosexuality as problematic. Picking at the ties that bound identity and a way of being together, I realised that I had become entrapped in a delimiting relational pattern that offered no real "resist-stances" (Grace & Benson, 2000, p. 89). I had become unable to think of myself outside of heteronormative terms and constructing myself out of the linguistic frames and tools available; I had bought in to the seductive chimera of belonging based on identity.

In recent years, I have come to consider it more appropriate to speak about men who have sex with other men and women who have sex with other women. Increasingly I find my self surrounded by some very 'queer' 'straight' people who productively trouble the limitations of identity. Encountering individuals who author themselves as 'Other', and who consciously resist the impact of normative institutional and cultural practices has connected me to lives that are also "at odds with the normal, the legitimate, the dominant …" (Halperin, 1995, p. 62). I have come to understand the ways in which "Queer … demarcates not positivity but a positionality vis-à-vis the normative … [Queer] describes a horizon of possibility whose precise extent and heterogeneous scope cannot in principle be delimited in advance" (ibid, p. 62) and I have come to have an expansive sense of what an inclusive community might mean or be. Changing cultural discourses and attitudes around sexuality have proliferated increased visibility around gay and lesbian people and it could be argued, though I am doubtful, an increased acceptance of homosexuality. The epistemic landscape around sexuality has radically altered since my youth and in my urban, predominantly white, middle-class, privileged world, I often encounter attitudes that could best be described as post-gay.

A fact of life I have grown accustomed to and experience is how, 'gay' as an identity has increasingly become a commodity, a unique selling point to advertise everything from deodorant to washing powder. Mark Simpson (1996), editor of *Anti-Gay,* remarks how the once useful slogan 'Gay is Good' has become transformed through the pervasiveness of capitalism into 'Gay is Goods' (Simpson, 1996, p. xiv). Harris (1998) is even more cutting, commenting how cultural ideas 'founded on the ideas of sexual identity has yielded bland magazines, fiction anthologies, and museum exhibits that turned 'queer' into a marketing device (Harris, 1998, p. 82).

In my relationships with others I now choose to identify as queer. I do so to disrupt those who would have me married-off and mortgaged. I find myself hearing people tell me they couldn't care less about who I fuck or who fucks me and why do I have to make it such an issue. I have started to question what I am doing in my constant re-voicing of my queer presence and if I am making too much of my particular claims of self. Having an experience of connection/disconnection has been about the visible presence or absence of my queer identity and I have become accustomed and attuned to quickly surveying the conventions, cultural understandings and assumptions of the ‘straight’ and ‘gay’ domains in which I work, live and play. The homonormative impulse (Duggan, 2002) that seeks to silence my queerly positioned voice also sustains dominant heteronormative assumptions and has me constantly requestioning what has been suggested is: ‘the imaginary relationship of individuals to their real conditions of existence’ (Althusser, 1971, p. 162). Adopting a queer stance has made me realise that is not my imagination that is at work when I am told I do not have to speak about and from my life, but that it is heteronormativity in drag. By this I mean the increased imperative of sameness that seeks to homogenize difference and that would have me believe that I am making too much of myself when I speak or act “too queeny”, “too flamboyant”, “too camp”.

CONCLUSION

Speaking, acting and being from a queer location can be a way of critically being present to, and a way of interrupting how heteropower/knowledge gets materialised in everyday life. Paul spoke about how his queer sense of self was an important way of inserting the possibility and presence of difference and it is how he chooses to perform his identity with others:

> I am homofabulous. I thank fuck I am queer. If not, I would have got married to the girl I went out with at school, I would be a bank manager, with two kids, a dog and fucking bored. When I was 13 and 14 it was not the norm, it was not acceptable, it meant you would lead a lonely life, you would be vilified, it wasn’t good and you wouldn’t be a happy person. My urban family love and support me, I am big queer *****. I now have people in my life, who are very important to me, they love me unconditionally and I love them unconditionally. I have constructed my own kind of family. I have seven god children for which I feel an immense sense of responsibility and love unconditionally. I value that people consider me worthy enough to be a relative and important factor in their child’s life. I try to be a good godfather, I remember all their birthdays and I am fantastic at Christmas. What I have always said is that I wanted to be the godfather that I think I always wanted. I want to be a figure in their lives. I don’t yearn anymore but I do think that if I had had me in my life growing up it would have been marvelous. Paul

And Sam described how he has come to what he terms a bespoke identity:

> I don’t affiliate myself with the identities on offer I would much rather have my bespoke sexuality rather than align myself with a sexuality that is broadly me but some of it isn’t. When people categorize you or you categorize yourself, it is done to eliminate misunderstanding but I think it is completely the opposite. I don’t think there is a term to describe myself. I would have to make one up, wouldn’t I? Basically, I am a straight-acting man who has sex with other straight-acting men. It is just a bloke who is attracted to men. Sam

If our everyday practices of self could be said to construct and define the experiences of belonging/ not belonging, then our actions and identifications, that seamlessly become part of our everyday psychosocial realities, is how we often learn to negotiate, resist or reproduce the discourses of inclusion/ exclusion. It is the summoned *self*, constituted and defined by its position as respondent within and to performative norms that habitually inscribes how and in what ways we are able to find belonging. The messy threads of dissonance and acceptance are incessantly weaved throughout the practices of identity.

In my everyday life, I have over the years come to speak and act out myself out of a certain pattern of social relations, and a social order. In doing so, I consider I am better equipped to resist the structural frameworks that operate, with a pinioning force, to legitimise a hetero mode of being.

Eighteen months ago, I moved to Australia from the UK and visiting an elderly relative for the last time, I was told, "It is about time you find yourself a nice gay man and settle down and get married because you can do that now". I started to say how "Queer boys like me … but was quickly closed down with "You are not queer. Why do you have to say such things? You're just like us". Being "just like us" is a compellingly seductive narrative and maybe is as good as it gets? However, I am inclined to hope for a time when the heterocentric/ queer periphery is able to be permanently disrupted in ways, in which communities, irrespective of constituency, start to make more sense of sexual differences and problematise shared understandings of who is 'us'/'them'.

If identity is deeply woven into the fabric of day to day lived relationships, is embedded in the social and cultural practices of belonging then the notion of inclusive communities is intimately connected to the social, psychological and cultural possibilities of what identities are and what they can do. Shifts in political, social and cultural landscapes have resulted in an increased presence and practicing of 'inclusion' and yet 'common sense' presumptions that inform and reify normative discourses and practices of identity continue to reproduce and sanction the tacit abjection of difference. Sissy boys, butch girls, crips, queers, transgender men and women know all too well that social exclusion is not a place where one chooses to hang out (Butler, 2002), and that ways of doing gender, race, disability and sexuality differently can have costly consequences. Inclusion requires a commitment to making Other interpretative locations more than available. It requires an understanding that, to some extent, all of us have the potential to marginalise and exclude in our various attempts at ensuring we remain inside the culturally intelligible. Difference matters and none of us are immune from being worked over by the us/them, inside/outside, dichotomizing practices that make differences exclusionary.

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SHAUN GRECH

CHAPTER 5

DISABILITY, COMMUNITIES OF POVERTY AND THE GLOBAL SOUTH

Debating through social capital

This chapter seeks to bridge the gap between disability and development studies by exploring avenues for the application of social capital in elucidating and exploring broader epistemological and practical issues in the debate on disability in the majority world,[i] and through which to explore emerging themes around communities in contexts of poverty. The chapter argues that social capital, despite its neoliberal undertones and opportunistic stance in its adoption by the development sector, provides useful avenues for bringing development and disability closer together, as well as focusing discussion on local contexts, and the role of social relationships and community in the construction of disability, as a source of security, access to resources, and often survival in the absence of formal safety nets. Social capital may also draw attention to and potentially challenge the Western emphasis on self-reliance and independence (individualism), as well as discourse about the presumed (universal) treatment of disabled people across cultures. This opens up the analysis to more micro views of disability within local and social settings and associated factors and processes, notably poverty and its dynamics.

INTRODUCTION

The topic of disability around the globe too often starts with a reference to the huge numbers of disabled people, perhaps not so much a matter of crude statistics, but a critical reminder that disability is and has always been everywhere, and will always be. Disability embodies and cross-cuts humanity across space and time. The numbers are far from precise, but it is often suggested that around 10% of the global population is disabled, totaling some 650 million people. The recent (and first) WHO Report on Disability (WHO & World Bank, 2011) has pushed this figure even higher, claiming that more than 1 billion people are disabled (15% of the world's people). What ties these figures together, is that the bulk live in the poorest countries of the global South enduring some of the harshest levels of

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poverty, and the report consistently places this number at 80% of the global disabled population.

Despite the large numbers, attention to disability in the global South as an epistemological project, as well as a field of practice has hardly been forthcoming. The little that has appeared has been largely in the field of development, and in fact any references to a potential debate around disability in the global South are often placed under the heading 'disability and development'. The linkages between the two, though, are extremely recent, only dating back to the late 1990s. Arguments as to why disability should be considered and prioritized in development have included: the assumed relationship between disability and poverty (often depicted as a cycle); arguments that disability cross-cuts the politically charged Millennium Development Goals (MDGs); and broader shifts in the development sector. The latter have notably included the moves towards a human development paradigm and the prioritization of poverty reduction, the promotion of a rights-based approach in development, and occasional reference to notions of inclusive development. Despite the fact that most development organisations and governments instilled some or other disability policy, disability in practice remains blatantly excluded at research, policy and programme levels. While populations such as women and indigenous people, and themes of caste, race and citizenship continue to generate increasing interest, disability confronted by a development sector persistently relegating it to the realms of charity and/or medicalisation. Disability in the global South, has also not found much attention in the Western disability studies. The latter remains firmly focused on, grounded in and reflecting the concerns of disabled people in Western settings, while the widely complex and heterogeneous socio-economic, cultural and political realities of non-Western countries, and the lives of disabled people within these, are cast into invisibility or the subject of assumptions and gross generalisations – from North to South (see Grech, 2011).

While references to an assumed mutually reinforcing disability/poverty relationship have been many in both disability studies and international development, linkages between both fields remain notably shortcoming. Despite the fact that poverty is a cross-cutting theme, in practice disability and poverty are strongly dichotomised. In spite of this, disability studies concepts, notably the British social model and disability rights emanating from the US and the UK have found some proponents in the development sector (e.g. international organisations) seeking to sing along to the popular (read 'Western', 'learned', 'superior') tune when confronted by the 'strange' phenomena that are disabled people live in poverty in the majority world. On the other hand, development theory and concepts have hardly been considered when looking at disability in such settings, even when these have longer connections with a range of related thematics: poverty, chronic poverty, marginalisation, global politics, the global South and much more.[ii] One such concept is that of social capital, which in a field dominated by economists, has provided an opportunity (at least at the level of rhetoric by prominent parties such as the World Bank) to consider and give a name to the 'social', highlighting how the way people interact and organise, constitute fundamental foundations for growth and development, including addressing the structural inequities.

This chapter uses social capital as an analytical platform to critically engage with, question and discuss a range of complex issues related to disability, poverty and communities and through which to contribute to the broader debate around disability in the global South. More broadly, this chapter seeks to bridge disciplinary boundaries, in an effort to develop more complex, critical, sensitive and multi-layered analyses, part of a project I have termed *Critical Global Disability Studies* (Grech, 2011, 2012).[iii]

SOCIAL CAPITAL: AN ELUSIVE TERM

Attempts at defining social capital are confronted by a range of problems and is perhaps an impossible task, marking a fluid term "characterised by wide usage and great looseness of application" (Du Toit et al., 2005, p. 3).This fluidity will be sustained and encouraged in this chapter. Despite the difficulty to define this elusive term, and despite the multiple definitions, the basic and cross-cutting premise is that relationships matter and are valuable in their own right and because they offer critically important opportunities to access a range of other benefits (e.g. economic, cultural and/or political). Bourdieu (1986, p. 248) defined social capital as "the aggregate of the actual or potential resources which are linked to the possession of a durable network of more or less institutionalized relationships of mutual acquaintance or recognition". In his explanation, social networks do not form on their own accord, and is not a natural process, with the implication that they require investment in forming group relations. In Bourdieu's explanation, these networks are not necessarily harmless or egalitarian, but are instead an attribute of well-positioned elites, utilised to maintain their position and/or advance their interests. Social capital is therefore intimately bound to power and typified also by conflict. Coleman (1994, p. 302) defines social capital by its function: "it is not a single entity, but a variety of different entities, having two characteristics in common: they all consist of some aspect of a social structure, and they facilitate certain actions for individuals who are within the structure". The major proponent of social capital has been Putnam (1993, p. 35), who described social capital as the "features of social organisation, such as networks, norms, and trust that facilitate coordination and cooperation for mutual benefit". Social capital in this case therefore enables coordination and cooperation, but this time with the objective of mutual benefit for the members of the association. This process involves largely horizontal social groups such as associations, clubs and voluntary agencies that bring individuals together to pursue one or more objectives in which they have a common interest (e.g. farmer organisations). In the development sector, social capital has found a major proponent in the World Bank, shifting the attention of the concept towards the majority world, and often adopting a prescriptive stance in its application to poverty reduction (see http://go.worldbank.org/C0QTRW4QF0). It defines social capital as "the institutions, relationships and norms that shape the quality of a society's social interactions … Social capital is not just the sum of the institutions which underpin society – it is the glue that holds them together" (World Bank, 1999, p. 2).

Woolcock (2001) also distinguishes between three types of social capital. The first one, called *bonding* social capital refers to the ties between people in similar situations e.g. family members, close friends and neighbours. The second, *bridging* social capital refers to more distant connections of people in similar situations, such as friendships and work colleagues; while the third type, known as *linking* social capital refers to vertical relationships with those in positions of power. I shall refer back to these later on in the chapter.

In this chapter, social capital is broadly understood as "the norms and social relations embedded in the social structures of society that enable people to co-ordinate action and to achieve desired goals" (Narayan, 1999, p. 6). I feel that this definition usefully provides a broad conceptualisation of social relations (hence including networks, associations, both formal and informal and at micro, meso and macro levels), and the word 'norms' allows a focus on the local context and relationships emerging from the ground. This also provides for more 'relative' (as opposed to absolute) understandings against which individual attitudes and behaviours are positioned and understood. Therefore, it draws attention to the fact that contexts are multiple, varied and heterogeneous, and that engaging with a plurality of socio-economic, cultural and ideological landscapes is a requirement, as opposed to generalising from one context to another (physical, geopolitical and even ontological).

DISABILITY, DEVELOPMENT, COMMUNITIES AND TENTATIVE ANALYTICAL APPLICATIONS OF SOCIAL CAPITAL

The major epistemological attraction of social capital in the development has largely hinged on a number of aspects: the development sector remains dominated by economists and development is often equated with economic growth, and 'successes' measured by statistical shifts such as those in Gross Domestic Product (GDP) or Gross National Product (GNP) or even more ambitiously those presumed to have been 'lifted' out of poverty e.g. percentages deviating from some or other norm such as the poverty line; like other concepts such as 'social exclusion', social capital is at least in theory relational; and the word 'capital' implies that these social relationships are intrinsically valuable and also provide the means to access other benefits. The focus on capital has in fact perhaps helped earn favour also with economists in the field by providing a concept that was not overtly threatening in the human chess game of numbers.

Social relationships matter ... even in lands afar

A range of type of capital have long been acknowledged and promoted in development, including human, natural, financial and physical capital. But what clearly emerges is that these have invariably resided in and have been the exclusive property of the individual. Social capital on the other hand, denotes that which necessitates a level of collective ownership and cultivation to translate into resources for the individual. As Portes (1998, p. 7) observes: "… whereas economic capital is in people's bank accounts and human capital is in their heads, social capital inheres in the structure of their relationships. To possess social capital, a person must be related to others, and it is these others, not himself, who are the actual source of his or her advantage".

Furthermore, social capital in the same vein as the rights based approach to development, directs attention at those who are not included, providing a useful impetus for pushing the theoretical and practical lens in development towards disabled people and their inclusion in the mainstream development agenda alongside those of other marginalised populations such as women, ethnic and racial minorities and lower castes that have garnered increasing attention in the human development agenda over the past decades. I open up and discuss a number of themes emerging from this focus on social relationships in the next subsections.

Disability and its social construction

Directing attention towards social relationships is critical in positioning disability within its social context, since the meaning of disability, and conversely of what it means to be 'non-disabled' vary and depend on the hybrid contexts in which disability is placed. Disability is not only conceptualised differently across and within cultures, but this depends on what is valued socially, culturally and ideologically within certain contexts, and embedded in broader notions or personhood and cosmology, and the disabled individual's ability to fulfil these expectations. This echoes Derrida's (1978) work on deconstruction, troubling a range of binaries, and how one (e.g. disabled) necessitates the second (non-disabled) for its own definition, hence dependent on its opposite. While disability challenges normativity at the core, the two are never wholly detached – one and the other are bound, necessary and consequential. This is similar to the view of poverty as relative as opposed to absolute levels (whether consumption or income), with the implication that the starting point is the understanding, probing and problematising of the economic, political and social spheres, or more usefully what surrounds disabled people. In this process, the universalising medical model of disability constructing disability as a biological and personal predicament deviating from some pre-established 'norm' is severely challenged. Probing further the social sphere, also permits us to opening up the analysis to include the wide range of beliefs, responses and attitudes towards disabled people in hugely complex and varied contexts – not always negative, and often along a fluid continuum. It is also critical to emphasise that disabled people are not a homogenous group, and their perceptions and experiences are impacted and shaped by a range of dimensions, including gender, religion, group affiliation, roles, rights, status and citizenship at micro levels, implying that we also need to engage with a range of issues as disability confronts the heteronormative: patriarchy, racism and the list goes on. This is not to include other critical dimensions such as the type of impairment, when the lived body is (re)positioned as profoundly social (the fulcrum around which social interactions occur:

> bodily facts do not exist outside this setting, but only make sense within the social and cultural practices that constitute everyday life. (Rothfield, 2005, p. 38)

While the social model of disability has to a large extent permitted this shift in the analysis towards social processes, it still suffers from serious (often unacknowledged) epistemological and application problems across cultures, notably that it remains the product of a specific space and time (Western), articulating the concerns of Western disabled people through the work of predominantly white, middle class, Western (British) disabled and other academics (see Grech, 2009, 2011, 2012). The majority world is often hardly contemplated in mainstream disability studies (see for example Oliver, 1990, 1996; Barnes et al., 1999), but the exportation of ideas and models and inferences from the Western context about the presumed situation and treatment of disabled people in the majority world prevails. Development organisations and their documents are often the vehicle for transporting these Western epistemologies, models and ideas across cultures and facilitated by local and national organisations such as DPOs (composed of largely urban elites), academics and other stakeholders. As Stone (1999) in fact notes, even in the international disability movement, Western views, perceptions and experiences dominate the disability debate. What emerges perhaps more clearly is that the quest to universalize the disability experience, means that tools such as the social model, remain disengaged from the nuances and heterogeneity of disabled lives in diverse and complex histories, cultures, economic and political spheres. Respectively, what follows is that assertions such as the social model claim that all disabled people are oppressed, runs the risk of gross generalisation, reductionism and simplification. Secondly, if poverty is a major characteristic of the context in the majority world, then the need to understand how poverty conditions the lives of disabled people, their households and more broadly communities including in a range of spaces and places (e.g. rural, urban and peri-urban), and is negotiated and survived remains not only a critical concern, but perhaps the starting point for anyone engaging with disability in the global South. Poverty, like bodies, is therefore re(positioned) as social.

Networks of support – The communities of the poor

The major analytical power of social capital, is perhaps that enabling a focus on the productive aspects of relations while temporarily sidelining the problematic features. Networks of families, relatives, friends, and neighbours often remain the most important and valuable institution in the lives of poor people, facilitating access to food, money (e.g. through informal micro loans), labour, and information among others. This is especially the case for those in deep and chronic poverty, in contexts where formal safety nets are inadequate, absent or fragmented, where social and cultural life remains family based, and most critically where poverty is a shared reality. This horizontal type of social capital between poor people, or rather bonding social capital is characteristic of resource poor, isolated communities, who are more often than not “best linked, socially, with other poor households rather than to the ‘gatekeepers’ to important goods and services” (Bird et al., 2002, p. 28). In such contexts, and in the absence of formal protection systems, disability is almost exclusively a family responsibility (Grech, 2008). In line with this, social capital usefully sheds light on the resilience and resistance of poor people endowed with agency – actors in their own right. This permits the challenging of generalisations (many times historically, socially and culturally misinformed), discursively constructed about the presumed treatment (generally negative) of all disabled people in all the majority world at the hands of their families and communities. It is important to emphasise that this does not in any way deflect attention from the very real and material presence of discrimination and unnecessary suffering endured by disabled people. It simply stresses that that situation is by no means universal and even less confined to the world’s poorest countries. Many in fact provide refined pictures of a range of situations on the ground and across cultures, presenting numerous instances of even positive attitudes and support towards disabled people, sometimes co-existing with negative ones even within small communities (see for example Ingstad & Whyte, 1995, 2007). Perhaps the major problem with such discourse is that it continues to ignore and render invisible the care of families who historically have and continue to ensure the survival of their disabled members. Indeed, the only engagement with social relationships often remains limited to constructing them as solely sources of oppression. In light of this, and notwithstanding the fact that the proliferation of the social capital concept (like many other [re]discoveries) is a Western endeavour, it still remains perhaps one of the most social concepts promoted by the development establishment, one that calls for attention to the dynamics of relationships on the ground, and consequently to work to strengthen rather than undermine them. It therefore sustains the effort to look at other types of solutions for poverty reduction such as community-based initiatives enhancing capacity, trust and cooperation, while enhancing efforts at minimising activities threatening social relationships (see for example the Community Approaches to Handicap in Development (CAHD) developed by the Bangladeshi Centre for Disability in Development (CDD) in collaboration with Handicap International (HI) and Christoffel Blindenmission (CBM and the increasing visibility of CBR, especially in Asian contexts). While it is beyond the scope of this chapter, it is still perhaps important to mention that there remain much needed analyses into the dynamics and outcomes of these community initiatives in practice. Perhaps, long term, one must also assess the extent to which such initiatives may risk translating into ‘highly managerialist, rather than collective, notions of partnership and participation’ (Dean et al., 2005, p. 21).

The latter is all too important since the outcomes of the neoliberal globalising agenda and ensuing shifts to a market based economy have often been the breakdown of traditional communities and households providing support (especially to their most vulnerable members), threatened livelihoods, the shrinking of the public sector and mass privatisation, the vanishing of formal safety nets, and enhanced migration (rural to urban or across countries). While substantial research has been conducted on those migrating, gaps persist in knowledge concerning the impacts of migration on the poverty and deprivation of those left behind. Still, the pattern that emerges is that it is largely the younger and healthier members who migrate, implying that the elderly, disabled people, children and other weaker members are those often left behind – stripped of support mechanisms that historically have and continue to contribute towards their care and survival in conditions of hardship and deprivation. To emphasise, in conditions of poverty (and associated social, political, economic and often geographic isolation), informal community-based social networks (families, communities, churches etc.), are productive and often take precedence over the state, the market, and other institutions (governmental and non-governmental) in ensuring human welfare and survival of the poor (including their disabled) (Grech, 2009).

Positioning disability firmly within social contexts (and poverty as a social and shared reality), pushes us to look beyond the disabled individual towards the impacts and broader costs of disability for the whole family, whether direct or indirect. This task remains largely unattended to by both medical and social model understandings of disability. This is on account of the inherent Western assumptions within these around the presence of minimum levels of formal social protection; the tendency to view these families as complicit in disablement in social constructionist understandings; and the virtual absence of household analyses and longitudinal studies in cross-cultural research. The impacts of disability on the family are so strong that many have started to speak about ‘disabled families’ in literature focused on both the West and the global South (see Ingstad, 1997; Grech, 2011, 2012). Consequently, this implies that disability may best be viewed from a family perspective, in particular when the disabled family member if the household head. Caring for a disabled family member for those living in conditions of extreme poverty has severe social, economic and cultural impact. First of all, it constrains time and opportunity to engage in productive (especially remunerated) labour in particular for mothers, sisters and other female caregivers, implying that household capacity to earn an income is often reduced when directs costs (such as those of medication and assistive devices) are increasing. Disability also reduces the resources (especially monetary) available for the satisfaction of basic and other needs (e.g. food, health and medication) of other household members, hence exacerbating impairment and opening spaces for deeper and intergenerational poverty. It also reduces the time and opportunity (especially for caregiving members) to nurture and develop relationships of reciprocity upon which the poor often depend. Importantly, the dependence on and the ensuing impacts on the household, implies that intervention or rather poverty reduction efforts should be focused more broadly on supporting families as opposed to focusing exclusively on the disabled individual. Examples may include, supporting the children of poor disabled people to pursue their education, or helping with the costs of medication for working household members upon which the whole family (including the disabled person) is dependent. Ultimately, healthy, food secure and economically stronger families can become a more reliable informal safety net for their disabled members, without compromising their own health, consumption levels and well-being, now and in the future. These efforts must be done, though without losing sight of the broader structural and other problems impacting whole families and communities, and openness to learning about poverty and the barriers it imposes on all those living in it must be prioritised.

The relationships within households: On intra-household processes

Looking at households also offers opportunities for looking at the dynamics operating within them, and if and how these impinge on the well-being and poverty status of disabled people. The household until recently was believed to be an undifferentiated unit, that is a site of sharing, cooperation and altruistic behaviour, and where wealth, goods and services were distributed equally. But this unitary view of the households was profoundly challenged especially by feminists in the 1970s, showing that the processes within households determine how resources are generated, controlled and distributed, and that these almost invariably disadvantage women – processes of power differentials, conflict and inequitable access to and control over resources and benefits (Bolt and Bird, 2003). While intra-household differences on the basis of gender have been acknowledged, differentials based on disability remain largely unexplored, and little is known about disabled people and their roles, responsibilities, and access to assets within households. The social capital concept, or rather locating disability within the household, usefully opens up the analysis to these micro level relations. Acknowledging the possibility of intra-household disadvantages remains especially important, since it helps counteract an essentially Western view of the unitary household, one composed of blood-related nuclear families sharing and distributing resources and power equally, benefiting all members. Instead, it opens up the possibility to acknowledge and look at a range of households across cultures including those with no blood ties, may not necessary share residence all year, and where resources are not necessarily shared. At a more functional level, it may highlight how the provision of services or other benefits directed at the household may not necessarily reach disabled people, and this implies that we first need to understand how issues of power, identity, identification, and access among others are negotiated within households, and the functions of roles, norms, ideologies and perceptions (including about oneself) in these.

Questioning and repositioning rights: Individual or community rights?

The attention towards social relationships on the ground and the positioning of disability within these, provides a generous contribution to questioning and challenging the applicability of the discourse on rights, emanating from and often based on a Western individualistic perspective. While it is important to note that in theory rights holders also have obligations towards others, critics contend that these policies and slogans (e.g. ‘rights not charity’) are often far too detached from the social, historical, and cultural realities of the majority world, where community ties persist, and where individual rights may not be present or are overshadowed by relationships of mutual obligation and reciprocity (see for example Miles, 2000; Ghai 2002). As discussed earlier, these become critical in contexts of shared intense and chronic poverty. In such circumstances, the notion of an independent individual as a rights holder may be idiosyncratic to the strong social bonds and ways the individual is embedded therein, and therefore it may be more pertinent and responsible to speak of 'community rights'. In this case, addressing collective needs may provide better opportunities for social cohesion and economic stability for all, even though this requires greater political commitment, resources and addressing the structural causes of poverty. Collective interests may also not necessarily overcome individual ones. Across cultures, the complexity and heterogeneity of individual and social and family circumstances, and other factors and processes, makes the assumption of a unified and global move exclusively towards western individualism (and the valorisation of autonomy and self-determination) often untenable. Furthermore, at the intersection of the local and the global, what often emerge are hybrid contexts blending the old (the traditional) and the new (the modern), often hard to separate. The implication is that one can speak of multiple traditionalisms and modernities (see Garcia-Canclini, 2005). Examples are many including the use of technology such as mobiles and internet as sources of communication as well as resistance by rural and indigenous populations such as the Maya in Guatemala. Cultural beliefs and ideologies are also critical to consider here, since they not only retain extraordinary influence over people's perceptions, attitudes and behaviours, but are unlikely to be changed through legislation, policies or other written words. The existence of these is hardly even known by those living in poverty, whether on account of remoteness and geographical distances, lack of affordable transportation, inability to organise, or simply because the poor have little or no time for anything beyond immediate livelihoods and survival.

Social capital and access to assets: Critical linkages

The second reason for the major attention paid to social capital in development has hinged on its presumed ability to provide access to other assets, suggesting that social capital is not only an important asset in times of crisis, but above all may be called upon to lead to other material gains (including other sources of capital). The value of social capital is also enhanced when combined with other types of capital. Burt (1997, p. 359) for example, highlights how social capital complements human capital,[iv] stating that the returns to intelligence depend on and are also contingent on where a person stands in the social structure of a market or hierarchy: "while human capital refers to individual ability, social capital refers to opportunity". This has relevance to disability, especially since traditionally the only interventions in the majority world, have often been limited to prevention, rehabilitation, and occasionally skills-training, and/or special and segregated education without addressing the social element, and the influence of this on the success or otherwise of these initiatives with disabled people. For example, while education and skills training are intrinsically valuable and can possibly lead to employment (amongst other benefits), this task becomes increasingly difficult to achieve without considering social relationships in settings typified by disproportionate employment in the informal sector (especially in rural areas), and where such opportunities are generally sought through informal contacts, relationships and word of mouth as opposed to more formal means (e.g. job adverts in newspapers). The returns to education are also contingent on the quality of this education (often quality education is only available to the wealthiest and in urban areas) and importantly wealth and the connections it reaps through other elite – the poor can hardly exit their own reality. At a more practical level, the perceived value of education (or indeed if it is considered at all), may hinge on whether or not it will translate into concrete contributions to the household economy, over a relatively short span of time, and importantly will incur few or no costs.

In a development sector characterised by shrinking funds (associated with the neoliberal cost cutting advocated by the World Bank and IMF), facilitating membership in networks or broader structures became an attractive community based strategy. The argument is that these networks can aid access to other types of capital such as education and health, employment, and. The value of social capital for example has been emphasised as a critical factor in the emergent popularity of micro-credit schemes such as the widely acclaimed Grameen Bank model promoted by Mohammed Yunus (see Yunus, 2010). In this case, social capital generates one or more of three externalities: facilitates information transmission about the behaviour of others (reduces the problem of opportunism); facilitates the transmission of knowledge about markets (reduces market failures in information); and finally reduces the problem of free-riding and so facilitates collective action (Collier, 1998). Social capital therefore reduces transaction costs (the costs of information, monitoring and enforcement of contract terms) and enables a credit market to develop. Access to credit (from both formal and informal sources) remains especially problematic for disabled people, since they are often disproportionately unemployed or underemployed, lack savings and collateral (and have limited self-employment possibilities) and subject to the perception that they are non-creditworthy and/or unproductive citizens, to be supported solely through charity. Disabled people remain marginalised from mainstream credit programmes offered by development organisations, again confronting multiple problems to access including: attitudinal barriers, insufficient start up capital (symptomatic of profound poverty) and inability to satisfy programme requirements among others (see Cramm & Finkenflugel, 2008).

It is at this point that it is important to analyse what types of relationships lead to benefits, since it is an inaccurate assertion to suggest that all relationships are a useful portal to all types of assets. Perhaps a useful point of departure is that while families and other poor people are often the only source of support for poor disabled people, there is a limit to what they can obtain by making demands on each other's limited material resources. Indeed, high levels of bonding social capital among poor people do not necessarily lead to economic or other benefits, not only because of poor people's scant assets, but above all because often they are detached from organised groupings or lack contact with other groups (e.g. the gender movement) that may allow them to coalesce and 'move ahead' by augmenting political, social and economic opportunities, put pressure on the state, and to challenge the structural causes of poverty and social disadvantage in unison. Therefore 'bridging social capital', or rather cross-cutting ties among groups is often low. These factors are critical issues for disabled people, who like most other poor people, often lack contacts and membership in organisations that could leverage assistance or improve their lot. At the most basic level, disabled poor people have little if any contact with other disabled people, while collective organisations (other than those in urban areas frequently set up by non-poor urban disabled people or their families) remain seriously absent. Without these, they are unlikely to lobby governments and other parties. Evidence in fact indicates how poor disabled people often confront the most basic of constraints to participation in organisations: geographical dispersion, the inability to afford transport to attend meetings, inadequate information, mobility problems and lack of medical treatment and adapted assistive devices, power differentials, and high direct, indirect and opportunity costs (see for example Yeo, 2001; Ingstad, 1995). Even more lacking, is 'linking' social capital or rather, contact with those in powerful positions (especially policy makers) that are capable of enabling access to resources not available through lower level social contacts, itself reflecting the often minimal political clout of disabled people and their organisations as voters and citizens, even when compared to other marginalised populations.

Within this context, the implications for development are the provision of support in building the organisational capacity of the poor, and the bridging of spaces between communities and social groups at different levels (hence enhancing bridging and linking social capital to enable access to new opportunities, information etc.), without threatening and reinforcing existing support networks and the security they provide (bonding social capital).

Social capital: The darker side of an opportunistic, Westerncentric concept

Social ties are not without problems, implying that like other concepts, social capital is no magic formula. Indeed, increasing evidence indicates that while social relations can enable access to resources, they do can also be a means of control; exacerbate or maintain social differentiations; exclude non-members; a source of conflict, violence, oppression and subordination; and a threat to personal freedom (see for example Portes and Landolt, 1996; Portes, 1998; Narayan, 1999; Fine, 2003). As Pantoja (1999, p. vii) aptly notes: "if one accepts that social capital is a common resource that can facilitate access to other resources, one should also consider that under scarcity conditions – such as those prevalent in developing economies and particularly among the poor – it can also become an integral part of the structures of constraint".

In societies where inequalities prevail (whether on the basis of gender, race, caste, ethnicity or disability), more social contacts will not necessarily benefit all people, especially if the structures and processes that disadvantage in the first place remain untouched – this is more akin to addressing the symptoms rather than the causes. Similarly, the ambitious claim by parties such as the World Bank, to be able to build social capital, just like building a school, remains problematic, arrogant and resonates with imperialistic overtones. At best, it remains difficult to conceive of social relationships just like any other commodity that can be imputed a value, controlled and traded on a market, and it remains highly dubious whether any external party can objectively develop and shape networks and relationships that are not only grounded in long historical lineages and local cultures, but also which develop on their own accord in particular spaces and time and to deal with specific contexts and situations.

Finally, an issue of major importance is the development 'environment' within which social capital came to gain importance, most notably the neo-liberal agenda[v] promoted by the Wold Bank and IMF and forced onto cash-strung countries through Structural Adjustment Programs (SAPs), and more recently Poverty Reduction Strategy Papers (PRSPs). In this case, in a neo-liberal setting typified by mass privatization (including health and education), cuts in public sector size and expenditures, the vanishing of formal safety nets, and enhanced individualism, 'community' may have simply been a convenient and cost-effective non-economic 'rediscovery' to fill gaps (in information, services etc.) left wide open by a vanishing welfare state. This is reflected in the increasing fate in NGOs and not-for-profits as government substitutes in more recent years, and increasing reference to notions such as social inclusion and exclusion in the North and increasingly in the South as synonyms for equity and inequity respectively. This therefore implies that the emphasis on social capital may be little more than a depoliticized effort in keeping the neoliberal wheel spinning at a consistent speed, while more important and complex issues concerning structural problems and neo-colonialism are sidelined or unaddressed altogether.

CONCLUSION

This chapter has addressed the potential application of social capital to the disability and development debate, a debate that is as complex as it is marginalised, and often bereft of disciplinary cross-fertilisation. Local complexities, contexts, and cultures, require a degree of attention to people, what they are doing on the ground, their needs and aspirations, capabilities and so on. While valuable and rich ethnographic inputs emphasising the primacy of context have emerged from a range of fields such as anthropology (see for example Ingstad and Whyte, 1995, 2007), and while development studies has long been addressing issues around poverty and its reduction (and has much relevance to disability), these are often rendered invisible in the global disability debate. The Western disability studies and its main tenets are all too often exported across cultures (through development and other organisations, of and for disabled people, North and South), often with lack of engagement with the realities of disabled lives in complex and often misunderstood settings, and how these impinge on issues of applicability of epistemologies across cultures. Lack of engagement with disciplines such as development studies remains problematic, since these, for better or for worse, have a longer (albeit turbulent) history of engagement with issues of poverty, gender, and ethnicity among others in the majority world, and from which lessons can be usefully drawn. At the very least, this can initiate much needed debate between disability and development studies if the phrase 'disability and development' is to ever become a concrete currency the equivalent of 'gender and development' that decades down the line remains a (albeit a much engaged with) work in progress.

The starting point perhaps is to understand that poverty remains an impending reality in which disability is enveloped, and poverty and disability are in turn engrossed in complex (and seldom understood) cultures, beliefs, ideologies, and communities. At the most basic level, it points towards the imperative of understanding poverty and its implications by those engaged in the study of disability across cultures. In this process, the expansion of boundaries (whether disciplinary or simply those of dialogue), remain perhaps most important to move for example beyond the views of social relationships solely as processes of disablement, to engage with the notion that communities for better or for worse, still matter, in some places more than others, continue to embrace and often ensure survival of most poor people (disabled and non-disabled) and consequently need to be understood further and reinforced.

NOTES

[i] The term majority world is used to refer to countries where the bulk of the world's population reside and where poverty is largely concentrated. Similar to Stone (1999), the term is employed to delineate the power and resource differentials with rich countries that host a smaller percentage of the world's population but where wealth is largely concentrated and controlled, and which exert influence and power (economically, politically, socially, and culturally) over poor countries.

[ii] Some efforts have been expounded at engaging a few concepts from development, notably Sen's (1999) 'capabilities approach' to disability (see for example Mitra, 2006) and to a much lesser extent, the Sustainable Livelihoods Framework (Grech, 2008), but other analytical approaches remain to date marginalised.

[iii] To emphasise, I do not seek to provide a critical evaluation of or to promote the concept of social capital – as I discuss later on, the advancement of the concept by many, confronts a range of charges, including Westerncentrism and neoliberal foundations.

[iv] While it is beyond the scope of this paper, it is important to emphasise that the term human capital 'constitutes the individual as an economic rather than a social actor, and as a competitive individual rather than a co-operative social being' (Dean et al., 2005, p. 31) and often translates into pressures in the majority world for educational and skills provision, with the target of enhancing labour force participation, productivity and more broadly economic growth in a globalised economy. Dean et al. (2005) go on to emphasise that this approach has often translated in policies with the proclaimed aim of creating opportunities for the poor, without taking account of the structural problems creating and perpetuating poverty, and hence the responsibility again falls squarely upon the shoulders of poor people, while leaving structures unaltered.

[v] The neoliberal agenda is one premised on '… an entire structure of beliefs founded on right-wing, but not conservative, ideas about individual freedom, political democracy, self-regulating markets, and entrepreneurship' (Peet, 2003, p. 8) and one that often translates into a set of prescriptive one size fits all measures for countries in the majority world (described in text in relation to structural adjustment programmes).

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CHAPTER 6

NEGOTIATING STIGMATIZED IDENTITIES AND OVERCOMING BARRIERS TO INCLUSION IN THE TRANSITION TO ADULTHOOD

INTRODUCTION AND CONCEPTUAL FRAMEWORK

Traditionally, research on stigma has focused on the perspectives of dominant groups and how they respond to stigmatised populations and minority groups (Crocker and Quinn, 2003). In this chapter the focus is on the perspectives of the stigmatised individual and how he/she interprets, is affected by and responds to stigma. Different forms of stigma are examined to this end. Since the self is influenced by social factors, stigma has important implications for the development of self concept, identity and consequently ones' interactions with others. While stigma inevitably impacts on the self, individuals actively interpret, respond to and manage stigma. In Cooley's 'looking glass self' conceptualisation (1902), the imagined judgement is crucial. In the transition to adulthood which often spans over several years, young people must develop a coherent sense of self that will be an important mediator of their life experiences and will influence adjustment to the various social environments they find themselves in (Erikson, 1968; Marcia, 1966, Harter, 1997). Life experiences are mediated through the self concept which consequently serves as a filter (Markus, 1977).

According to Mead (1934) the self is, in part, a social construct, influenced by the reflected appraisals of significant others; but it is also reflexive and we may conceptualize the self as a subject that initiates action and interprets the evaluations of others. This has important implications for agency and the active negotiation of identity.

> The self to which we have been referring arises when the conversation of gestures is taken over into the conduct of the individual form. When this conversation of gestures can be taken over into the individual's conduct so that the attitude of the other forms can affect the organism, and the organism can reply with its corresponding gesture and thus arouse the attitude of the other in its own process, then a self arises. (Mead, 1934, p. 136)

A. Azzopardi and S. Grech (eds.), Inclusive Communities: A Critical Reader, 85–102.

In his distinction between the “I” and the “me”, Mead (1934) stressed *both* the social foundation of the self and the belief that “the self does not consist simply in the bare organisation of social attitudes” (p. 173). Consequently, the self is not a structure, it is a process.

So how do institutionalised practices such as stigmatisation of minorities affect the self and identity of the developing young person? People are born into social structures they did not create, and live in an institutional and social order they never made. The norms of society enter into the "me" as constituent elements, yet the “I” always re-acts to social situations in a unique manner. The self is hence a combination of the ‘me’, influenced by institutionalised social practices and an ‘I’ which is a more spontaneous open self. Giddens (1991) writes how, in the post-traditional order, self-identity becomes a reflexive project – an endeavour that we continuously work and reflect on and for which the individual is responsible. The self forms a trajectory of development from the past to the anticipated future and self actualisation is understood as a balance between opportunity and risk. The self is routinely created and sustained in the reflexive activities of the individual.

Thus, although young people are inevitably influenced by the institutionalised practices inherent in the structure of any social grouping, they possess agency which may either reproduce the social order or lead to social change. Stigmatized young people interpret and respond to stigma. For example, they may challenge the dominant ideologies that retain them in their minority status and through political activism become agents of social change. Hence the personal is always intricately tied up with the political. Ahearn (2001) discusses “the culturally constrained capacity to act”. Bourdieu, Sahlins, Giddens, and Mead much before them, all explored how the actions of people are dialectally related to social structures. Berger and Luckman in their classic text from 1967 discuss how humans make society even as society makes them. To this effect this chapter will explore how young people experience stigmatised reactions to them, how these are interpreted by them in view of their existent self concept and social interactions, and how these interpretations are consequently incorporated into the self concept continuously influencing a forever fluid identity. The process may also influence existent social structures and practices through the activities of individual members of the community.

YOUTH TRANSITIONS

The concept of youth transitions is also very central to the argument in this chapter. Life transitions are periods in time when individuals experience major changes most often occurring during two relatively stable states of human development. The associated changes with the transition bring instability as the person passes through (Williams, 1999). During this period, the individual is typically required to make major adjustments, to develop new skills, or to learn to cope with new experiences. A successful transition to young adulthood will form a foundation for the individual in future stages of development and transitions. There is a sharp discontinuity with the past and the self concept is challenged. According to Coles

(1995) there are three interrelated transitions made by young people some of which must be achieved before being accepted into adult society. These include the transition from school to work, the domestic transition, that is, the move from family of origin to family of destination and the housing transition, the move to a residence away from the parental home. The extension of transitions, characteristic of late modern societies together with changes in typical sequence of events has implications for the establishment of identity (France, 2007; Cieslik & Pollock, 2002). It is generally agreed by scholars in youth studies that all three transitions have become more complex and difficult to negotiate (Cieslik & Pollock, 2002). Traditionally transitions meant young people left school with relative speed and ease, obtained employment, found partners and established independent families and households of their own. Extended or protracted transitions in which the achievement of jobs, family formation and leaving home are delayed and embarked on at a later age are more characteristic of youth today (Furlong & Cartmel, 2007). Many young people also experience fractured transitions and are faced with a protracted struggle ever to obtain reliable work in the formal labour market or to form stable partnerships in secure and independent accommodation increasing the likelihood of risk biographies. It is hypothesized that young people with a stigma are more likely to experience fractured transitions (Catan, 2003).

STIGMA

Stigma is an elusive concept. It is a term readily applied to any ‘disreputable’ person, group, activity, occupation or location. According to Kando (1972, p. 475) “the term stigma can be used to refer to any attribute that is deeply discrediting and incongruous with our stereotype of what a given type of individual should be”. Stigma is a relational concept; it denotes that the person who is stigmatised is considered to be of lesser moral worth than others in the community. It therefore leads to an imbalance of power in the relationship between the stigmatised and the non stigmatised. According to Durkheim (1951), the establishment of a sense of community is facilitated by a class of actors who carry a stigma and are termed deviant. Unity is provided to any collectivity by uniting against those who are seen as a common threat to the social order. Goffman (1963) distinguished between three different types of stigma: physical, conduct and tribal that may be carried in two ways: discredited and discreditable. Stigmatised people are those deemed to fall short of the mainstream expectations of society. However, it is not just about ‘differentess’, it is more about being considered to be less desirable and, in the extreme, considered to be a threat to society. Goffman (1963, p. 3) described this eloquently when he stated that the person with a stigma is “reduced in our minds from a whole and usual person to a tainted, discounted one”.

Jones and colleagues (1984) identify six dimensions of stigma that impact on the degree of exclusion experienced by targets of stigma. The first, concealability refers to how easily a stigma may be hidden. Clearly those with concealable stigma may choose to hide what others consider to be a failing and have options available to them that are not available to those with visible ‘failings’. Consider the options available for a 'secret' homosexual as opposed to a young person with a visible physical disability. A second important dimension is whether the stigma is progressive, that is whether it becomes more salient with the passage of time. Progressive stigmas often lead to increasing exclusion. A third consideration in this respect refers to how debilitating the stigma is perceived to be in terms of the everyday functioning of the individual. The fourth dimension is aesthetics, which refers to how the stigmatised person subjectively experiences the stigma as unattractive. The fifth concerns the origin and hence the responsibility for the stigma and the sixth involves how dangerous the stigma is considered to be to others. Crocker et al. (1998) argue that the two dimensions of visibility and controllability are the most important. While those whose stigmas are able to be hidden may be spared social rejection, they may suffer other costs that effect their well being. People whose stigmas are controllable are held to be more responsible and are less liked and more likely to be excluded than those whose stigma is not thus considered. Exclusion is incompatible with well being.

NARRATIVES OF STIGMA

The data explored in this chapter was collected in Malta as part of a research collaboration between the Department of Youth and Community Studies at the University of Malta and the Centre for Youth Work Studies at the University of Brunel. It utilised a narrative approach where members of four stigmatised groups were asked to "tell me the story of your life" guided by the methodology advanced by Wengraf (2001). Wengraf proposed the Biographic-Narrative Interpretive Method (BNIM) as an effective method to research the lived experience of individuals and collectives (Wengraf, 2001). Because it lends itself to both psycho-dynamic *and* socio-dynamic approaches, it is particularly suited for researching social psychological issues like stigma. Most of the interviewees focused on their experiences of stigma. They claimed that stigma was pervasive in their lives. Their experiences will be analysed in terms of three interrelated conceptual categories which are emergent from the data: the experience of stigma, stigma effects and the responses to stigma in attempts to confront, conceal or cope with the stigma. The level of analysis in this chapter will be on the individual and will explore mainly how it impacts on the transition to adulthood. The interviewees were all young people, males and females between the ages of 18 and 30 and were interviewed in a variety of settings by an experienced research assistant

THE EXPERIENCE OF STIGMA

Concealability/visibility

Stigma type has important implications for the way it is experienced by young people. Disabled young people experience what Goffman (1963) calls a physical discredited stigma that is difficult to conceal. This difficulty of concealing one's stigma was also experienced by young refugees. In the case of easily visible stigmas, the possibility of 'passing'[i] is reduced. Physical disability and skin colour are easily identifiable cues that facilitate schematic processing.[ii] (Rumelhart, 1980). Skin colour and physical attributes are examples of easily identified cues.

> The colour of the skin, it means a lot to people, it is not only who you are, but also how they do treat you. Refugee M[iii]

> Being black is not being human. Refugee F[iv]

> Some Maltese are very racist with us … they do not like our colour … but it is not my fault that I am black … In Africa it is different. Refugee M

> We are backwards here in Malta …. The mentality is crap. People always see us as different, for example they never really see me as normal …. People are either shocked. Disabled person F

This problem was not experienced by LGBT youth or drug users who can easily hide their stigma. However the internalisation of societal values leads to a process of self labeling which was also detrimental to a burgeoning self concept.

> Throughout all this I had never even started to say the word gay in my head … it was a word that I hated with a passion … a word that I did not even want to mention to myself … a word that made me feel queasy. LGBT F

The difficulty of 'passing' as 'normal'[v] in a highly communitarian, interdependent society like Malta[vi] was emphasised : Passing refers to a situation where, in order to avoid anticipated stigma, an individual with a disability for example actively presents themselves as someone who does not have a disability, or a history of a disability (Goffman 1963). Covering is used by individuals who may not be able to "pass" as "normal" but nevertheless wish to minimize the impact of their disability (Goffman 1963).

> word passes from mouth to mouth and you suffer a lot. Drug user M

> My mother would come home and tell me 'listen this person knows about you because they went to talk to your aunt and you have to be careful if you're going to the detox centre, you have to be careful people are seeing you, people are talking. Drug user F

Not quite human

Goffman (1963, p. 3) wrote that the person with a stigma is "reduced in our minds from a whole and usual person to a tainted, discounted one …. By definition of course we believe the person with a stigma is not quite human. On this assumption we exercise varieties of discrimination, though which we effectively, if often unthinkably reduce his life chances".

> Many people they look at us like we are not even human, they talk about you in front of you … people staring at you when they are driving … you are like an animal at the zoo. Refugee M

Drug users are seen to be of lesser moral worth since addiction is viewed as a conduct stigma and drug users are held responsible for their condition. One young male drug user commented – '*people still label you, for them someone who uses drugs is less than other people*'. Through the process of reflected appraisals, this lesser worth may be incorporated into the self concept of these young people. The same drug user continues

> when I was on drugs, especially when I was using heroin I felt much less than other people … you cannot not feel this way since nobody accepts you. Drug user M

The research evidence on the implications of stigma for self esteem is contradictory (see Crocker & Major, 1989). Stigmatised groups are groups towards which others hold negative attitudes and prejudices, and who receive disproportionally less interpersonal or economic outcomes relative to the majority group. A labeling theory perspective suggests that the self-concept is a product of both ones awareness of how other evaluate the self and the adoption of those others' views. According to this view, people in stigmatised groups would have less positive self evaluations since those who interact with them may assume lower performance and react to foster that belief, resulting in a "self-fulfilling prophecy".

However, empirical evidence is contradictory: for example, in the United States self-esteem in blacks has been measured equal to whites (Crocker & Major, 1989) The same trend is true with Chicanos and women (and most other differences that provoke discrimination) (Crocker & Major, 1989). The literature alerts us to the self protective properties of social stigma. For example negative feedback from others may be attributed to one's group membership and not to lack of ability, hence protecting self esteem. This self-protective function even works when one cannot attribute the failure to prejudice. Internal attributions for success and external attributions for failure generally result in higher self-esteem. If stigma may be interpreted as a stressor, stigmatized people have a vast array of responses to stressors resulting from their devalued social status, including emotional, biological and cognitive responses. Members of a stigmatized group may protect global feelings of self-worth by: (1) attributing negative feedback to prejudice; (2) comparing outcomes with those of their in-group; and (3) selectively devaluing areas in which their group does poorly and valuing dimensions in which their group excels (Crocker & Major, 1989). However, perhaps part of the problem for research on self esteem among people with stigmatized identities has been the tendency to conceptualise self esteem as a stable trait that individuals carry with them from situation to situation. On the other hand research indicates that the impact of reflected appraisal depends on who is doing the evaluating, under what conditions, how often and on what dimensions. Self esteem is not a stable trait etched in stone, rather it is situationally constructed (Ascencio, 2007).

THREAT AND SHAME

People with a stigma may be viewed as a threat to society (Falk, 2001). This view is often compounded by media representations of stigmatised groups.

Preoccupation with risk, inherent in media accounts of certain categories of youth and their activities, foster the creation of moral panics (McRobbie, 1991; Curran, Smith, & Wingate, 1987; Buckingham, 2003; Devlin, 2003). The media constructs categories of young people as being passively at risk or actively engaging in risk, depending on their gender, class or status (Griffin, 1993; Clark, 2009) and serves as a thermometer measuring society's attitudes towards specific groups of young people. Social representations, being inherently evaluative, take shape through the social discourse of values. They are not bound by the cannons of logic. Through the media, stories about youth' are constructed "with certain groups of young people represented as particularly 'deviant', 'deficient' or 'resistant' (Griffin, 1993, p. 1). This can be applied particularly to the case of young immigrants in Maltese society about whom one may find media accounts on a near daily basis. The young immigrants reported how the Maltese generally view them as a threat:

> They say we steal jobs, we take money, we bad people. Refugee M

> Many people they look at us like we are not even human, they talk about you in front of you, sometimes you hear someone shouting that they don't want us in Malta, because Malta belongs only to the Maltese … I do not want to take Malta away from the Maltese. Refugee M

Being perceived as a threat contributes to the mortification of the self and adds to an imbalance of power between the stigmatised and the stigmatiser. The categorisation of all African refugees as a homogenous group does little to facilitate inclusion. According to one refugee it is this lack of understanding and ignorance that leads to fear.

> I come from the city, I go to school, we have buses and all the things … but for the people here that is Africa and we are all like animals from faraway land. So yes there is fear because they do not know us you are afraid of something if you don't know him no? Refugee M

The Maltese tend to categorise all immigrants into one group, irrespective of where they come from, the situations that compelled them to leave their countries and their religious affiliation. Stereotyping is rife.

> The Maltese they see us all the same: black, African, dangerous. Refugee M

According to the contact hypothesis[vii] the key feature of prejudice and inter-group conflict is the existence of unfavourable stereotypic attitudes and related behaviours (Allport, 1954). Negative attitudes may be enshrined in those stereotypes built on lack of informed judgment and prevailing social ideologies. The best way to reduce tension and hostility between groups is to bring them into systematic contact with each other in various ways (Brown, 1995).

One drug user described how lack of trust from members of his family and his community left him feeling isolated. The need for connectedness and belonging is an essential youth need (Bronfenbrenner, 1979) – "*The thing that breaks you down the most is loneliness*" (Drug user M). The stigma of addiction was felt to follow one wherever one went. Anthropological studies of the Mediterranean region

(Peristiany, 1965; Boissevain, 1974; Davis, 1977; Gilmore, 1982, 1990) highlight how common structures give rise to consistent societal values, most notably, honour and shame (Gilmore, 1982, p. 179).

Honour is the value of a person in his or her own eyes as well as in the eyes of the community (O'Reilly Mizzi, 1994). The attribution of honour and shame is an interactive process involving the status which a person claims, in combination with the social group's affirmation of that claim. This has important implications for those labeled as deviant. A person whose honour is rebuffed by the community is humiliated, labelled as ridiculous or contemptuous and treated with appropriate disdain. In other words, honour is not simple self esteem or pride; it is a status claim which is affirmed by the community, that is, a process of interaction. Shame, on the other hand, may be construed either positively or negatively. Positively, shame is sensitivity towards one's reputation. Negatively, shame refers to loss of status, and possibly, humiliation. (Pitt-Rivers, 1977) Those who do not subscribe to the norms of the community, such as people with a stigma are considered to be shamed. Malta is a strongly religious society. LGBT youth are continuously faced with the dilemma that they are engaged in sin and experience shame acutely. Leviticus 18:22 says: "Do not lie with a man as one lies with a woman; it is an abomination" and Leviticus 20:13 states: "If a man lies with a man as one lies with a woman, both of them have done what is detestable. They must be put to death; their blood will be on their own heads". A common theme to emerge from the LGBT data was the shame experienced by young people as a result of their religious upbringing and the difficulty of reconciling their sexual orientation with their religious beliefs.

> That feeling haunted me for a very long time. I spent a year experiencing inner conflict and yes, turmoil, trying to do everything to avoid the pull that I was clearly feeling towards men. Shaking off thoughts and trying to get the message across to myself that what I was doing was wrong. LGBT M

> Before moving out I lived with my parents and it was hell, my mother used to follow me around with the bible. LGBT M

> I was convinced that it was not right since I was very religious. So being religious and gay did not match. LGBT M

> If I could I would leave from the Roman Catholic Church, if I could ask to be deleted from their registry, I would do it. LGBT F

Shame acts as an important means of social control, often through the mechanism of gossip. The values of honour and shame function more effectively in traditional face to face communities (O'Reilly Mizzi, 1994). In the process of modernization, western societies became ever more individualistic. This involves greater insight into one's preferences and being able to act independently, as well as a change in social regulation from normative prescription to negotiation. These developments are linked to several other modernization processes, such as growing division of labour, protraction of the period of youth and expanding education. Sultana and

Baldachino (1994) highlight how a characteristic of Maltese society is the blending of the old and the new. The villages and towns of Malta and Gozo are face to face communities where most persons know each other by name and also know many personal details about each other (Clark, 2006) The strong communitarianism is clearly manifested in the active participation in the annual village *festa* (Boissevain, 1969; Azzopardi & Clark, 2005) Population and land size influence everyday life and there are various signs that point to a still vibrant community life (Archdiocese of Malta Secretariat for Catechesis,[viii] June 2008). The importance of one's reputation diminishes as the intensity of interaction also diminishes. Life in Maltese towns and villages has a quality of intimacy not found in metropolitan cities. According to Bailey (1971, p. 5) "It is very hard to mind your own business if you live in a village. It is hard even if you were not born there and have come to live in the village as a stranger. It is impossible if you are local born and bred, and if half the village consists of your kinsmen and the other half went to school with you". Although many Maltese live in towns and there is an urban-suburban-rural distribution of the population (O'Reilly Mizzi, 1994), people in Malta see themselves as members of a particular community. Indeed the Maltese could be characterised as "urban villagers" (Gans, 1962). Life in Maltese communities results in multiplex relationships which makes the consideration of one's honour a matter of grave importance. The small size of the island and the density of the network of relationships mean that individuals meet over and over again in the process of exercising a variety of roles. According to Bailey (1971), where the intensity of interaction levels off towards single interest relationships, then people will need to be less careful about their reputation. It is therefore in societies characterised by multiplex relationships that the code of honour and shame is likely to manifest itself and to regulate social behaviour. The presence of a strong 'moral community' is felt in Maltese towns and villages as people are prepared to make judgements about one another. This often takes place through the mechanisms of gossip. There is no sense of anonymity. O'Reilly Mizzi writes "if your behaviour deviates from the norm you cannot move to another part of the community and start again. Your reputation will follow and catch up with you very quickly" (1994, p. 375). This has important implications for the stigmatised.

The stigma experienced by the deviant is also extended to those with whom he may have close contact, for example family members. The LGBT youth and the drug users in this study highlighted how their parents complained to them of what Goffman (1963) has called "courtesy stigma". A young female drug user states about her mother. "*She didn't want to face it you know, for her I was embarrassing*". The fear that neighbours and extended family members would find out about the deviant behavior was a common theme in these young people's experiences.

An important consequence of Malta's small size is a high degree of social visibility and consequently the difficulty of hiding a stigma.

> Knowledge which elsewhere is either private or unavailable is quickly acquired … and rapidly transformed into a public consumer good via the exchange of information

> and gossip. Such a high degree of transparent, interpersonal communication engenders a pervasive atmosphere of familiarity. (Sultana & Baldacchino, 1994, p. 16)

In Malta, it is very difficult, if not impossible, to retreat into anonymity. The likelihood that reputation follows the individual when s/he moves is therefore increased because of the small size of the island. In Malta deviants are more constrained to bear the brunt of public contempt. They cannot escape to another town or city and start afresh. They are therefore forced to live in a community which is outcasting and stigmatising, with the result that many become socially excluded.

THE HIDDEN COSTS OF HIDDEN STIGMA

Despite the negative experiences of stigma, attempting to 'pass' as 'normal', for those who have a discreditable stigma, was not considered to be a feasible option for two main reasons: the stress associated with passing and the lack of authenticity experienced. Developing a secure sense of self is perhaps one of the most important developmental tasks of late adolescence and emerging adulthood (Erikson, 1968; Marcia, 1980; Arnett, 2000). Public affirmation of one's gay identity was an important theme to emerge in the data "*I would rather be on my own rather than going back in the closet ... my identity is too important for me to give it up, I would be compromising my life*" (LGBT F). The stress of passing was also discussed by the drug users who felt afraid that people would find out about their addiction.

STIGMA EFFECTS

Attitudes towards the stigmatised

Possessing a stigma reduces one's social power in the community and often results in discrimination.[ix] The young people who participated in this study perceived their opportunities as having been drastically reduced as a result of prejudiced attitudes in the wider community making their negotiation into the adult world more complex.

One may classify attitudes towards the stigmatised (Ng and Chan, 2000) into the following: separatism, stereotyping, restrictiveness, benevolence, and pessimistic prediction. Separatism involves a host of attitudes that emphasise the uniqueness of those with a stigma and keeping them at safe distance. For example this would involve agreeing to the statement – '*if an open centre is set up in my community or street, I will move out of the community*'. This was experienced by all of the four stigmatised groups. LGBT youth felt that members of the straight community generally would tolerate them as long as they kept to themselves. Refugee young people felt this most acutely because they were physically separated in detention or open centres

> I come from a culture where the community helps each other, where we share … We are not part of the community. They say … we bring disease. Refugee M

Stereotyping involves holding attitudes that define groups of people in a certain pattern and make generalizations based on membership in a particular group. Of the four stigmatised groups it is the refugees who felt to have been victims of stereotyped judgments. "*The Maltese they put us all together – African-black-dangerous*" (Refugee M).

Restrictiveness involves holding an uncertain view on the rights of stigmatised groups for example a young disabled person tells of his parents reaction to his wish to marry:

> when my brothers decided to get married they were very happy about it, as a matter of fact that was my argument, I questioned why when my brothers decided to get married they were all happy about it while in my case it was totally the opposite. Disabled person M

Benevolence refers to attitudes related to kindness to people with a stigma but in paternalistic directive manner that does not allow for self determination. This was mainly experienced by the disabled young people. Pessimistic prediction involves holding the belief that the situation for the stigmatized is unlikely to ameliorate. This was reported mainly by the drug users in the study who claimed that society continued to view them as criminals despite their recovery from addiction. They were often denied active citizenship due to the belief that 'once a drug user, always a drug user', supported by the popularity of the medical disease model of addiction. Refugees may also experience this since local media accounts highlight how integration of immigrants is difficult because of differences in religion and culture.

YOUTH TRANSITIONS

The young people in the study reported having experienced discrimination repeatedly, making the negotiation of their transition to adulthood difficult. Young people face a range of developmental issues including work and relationships, exploration, intimacy and commitment to goals, exploring and crystallizing vocational choice. Older adolescents and young adults enter transitions with the goal of becoming independently functioning adults, as they strive to meet evolving personal and career related needs. This is not always easy for those belonging to stigmatised groups because of reduced opportunities resulting from discriminatory practices.

The present study indicates that stigmatised young people experience 'fractured transitions' whereby they are faced with a protracted struggle ever to obtain reliable work in the formal labour market or to form stable partnerships in secure and independent accommodation. Because of unequal distribution of economic, cultural and social capital and other resources necessary for social integration three trajectories may be distinguished: (1) trajectories of risk biographies, (2) Trajectories oriented towards the normal biography (yet with ambiguities and insecurities), (3) Trajectories of choice biographies (Walther et al., 2002). The young people interviewed for the purpose of this study may be held to have risk biographies characterized by risk and uncertainty and under such conditions it can be difficult to maintain a stable identity.

Employment constitutes a rite of passage into the adult life world and confers upon the young person adult status. Many of the young people interviewed felt that their stigma reduced their opportunities for regular legal employment. This was mainly experienced by the refugees, the disabled persons and drug users but also in some cases by LGBT youth. The choice and risk biographies described above are clearly illustrated in the following case of a transsexual young woman:

> Yes at first they would say yes no problem but then the second you give them your ID card they would say that they would call and then they never called so I gave up. There were people that told me that if I changed my lifestyle they would employ me and I said at the end of the day I am not going to live the way others want me. I had to do what I didn't want, I had to start working as a prostitute because I couldn't find a job and the situation at home was unbearable so I said I can't go on like this. LGBT F

A young disabled man comments with regards to his attempt to become financially independent:

> I am 24 years old and have my parents with me all the time. I do not work because there are no jobs for me. I have been trying and I really want to work to do something and be independent. … I try asking people, maybe there is some small office job that I can do, but when people see that you are disabled, they think you are slow … maybe yes you are slower than others and you need much more support. Once I applied for a job that I qualified for but did not say that I was disabled and they called me for an interview. But when I went with my parents and they saw me in a wheelchair, their faces changed and the person told me that probably the job is not good for me and that was it.

Young people need to develop a sense of autonomy from their family of origin. Economic independence is important in this regard. But economic independence is not guaranteed for all young people. A young male refugee comments:

> Finding work is an everyday problem for most of us. you wait sometimes nothing happens … if you have good work, you can earn good money, you can save something and you can live on your own and plan … plan for the future.

Without regular employment young people's futures are risky and uncertain and the transition to adulthood is fractured. One drug user recounts of his experience after he completed a rehabilitation programme:

> And when you leave San Blas (treatment centre) people start rejecting you, you go to get a job and every time, no, no, no.

Without regular employment the housing transition is difficult to make and young people remain dependent on their family of origin. The implications for identity of an increased period of dependency are important to consider. While protracted commitments that are feely chosen such as a consequence of continued educational advancement allow young people to exercise choice, forced protracted commitments are likely to result in risk trajectories as young people are denied full adult status and independence. For the disabled young people this theme was particularly salient "*you are totally dependent on your parents, who plan and organise everything for you, take care of you, take you out, feed you … they may treat him like a child for the rest of his life*", Disabled person M.

COPING WITH STIGMA

Focus should also be directed towards the adaptive reactions of individuals who possess a social stigma. While possessing a social stigma is potentially stressful, research on coping with stress tells us that there is not a simple direct relationship between exposure to stressors and negative outcomes. So although those who possess a stigma may encounter more stress than do those who do not, this does not necessarily translate into poorer outcomes. Research on the outcomes of stigma possession on individuals has yielded mixed conclusions (Crocker & Major, 1989). Few would argue that prejudice and discrimination do not have negative effects on those with a stigma. One area that has been well researched is the effects of stigma on self esteem and some studies indicate that the self esteem of stigmatised individuals is not necessarily lower than that of non stigmatized groups and that there is also variation between stigmatised groups (Crocker & Quinn, 2003). Hence it is interesting to explore what young people may do to mitigate against the negative effects of societal reaction and to explain how people who are exposed to more frequent and more intense environmental demands do not necessarily suffer reduced well being. Two important responses to stress are cognitive appraisal and coping.

According to Lazarus and Folkman (1984) cognitive appraisal involves primary and secondary appraisal. An event is experienced as stressful when the primary appraisal of threat exceeds the secondary appraisal of coping.This means that the threat is seen exceeding one's resources for coping. On the other hand, coping involves constantly changing cognitive and behavioural tactics to manage specific external and internal demands that are appraised as taxing. When young people appraise stigma related threat and see it as a source of stress but think they have the resources to cope the outcome is positive. If on the other hand they do not think that they have the resources to cope then outcomes are more negative. In the present research various instances of coping where explored by the interviewees. For those with a discreditable stigma which can be hidden, passing, that is, attempting to conceal the stigmatising feature was sometimes utilised as an attempt to cope but was seen as a temporary short terms solution that had negative impact on the search for an authentic self. Passing is not an option for those who have a clearly identifiable and visible stigma and was mainly utilised by the drug users and the LGBT youth. However the interviewees commented how this as often felt to be self deception: "*I'm quite upfront, when somebody asks me if I have a boyfriend I am not going to lie about the issue. I lied enough to myself and to people around me. So that's it, that's who I am*" (LGBT F). An alternative solution would be identification with the stigmatized group. Sometimes this took the form of political activism notably amongst the LGBT population: "*I became a member of the MGRM (Malta Gay Rights Movement) and it was the stepping stone to* *empowering myself*' (LGBT M). Sometimes identification with the stigmatized group may take the form of avoidance of social contact with those not similarly stigmatised.

> I'm scared … That's what keeps me back from making friends … I'm scared that if I tell them the truth about me they will push me back and rejection is the worst feeling. Drug user F

> For example I even wanted to work with addicts because for me it's comfortable being around addicts. Drug user M

> And then I started to socialize with the gay community and you learn that you are part of something and of something normal. LGBT F

Social support was cited by all groups as providing one with the resources to cope.

CONCLUSION

Growing up in a risk society has been conceptualised as involving the negotiation of individualized trajectories, the self being a reflexive project (Gauntlett, 2002). However young people continue to experience inequalities based on structural and institutionalised practices (Furlong & Cartmel, 1999). This chapter has shown how, in the Maltese context, as elsewhere, minority group members such as LGBT youth, young refugees, disabled young people and young people with a history of criminal and addictive behaviour face several challenges in the negotiation of the transition to adulthood. The data presented in this chapter has shown how the institutionalised stigma associated with belonging to such minorities poses a threat to the personal and social well being of these young people. Living in a society which continues to view them as 'not quite human' and sometimes as a real threat, these young people struggle to negotiate an authentic identity and establish themselves in a society that rejects them and denies them full participation and citizenship. This chapter has documented how young people in Maltese society experience stigma and how they attempt to build authentic selves.

In their search for identity many of the young people interviewed have managed to build an authentic self despite their risk trajectories. This is clear in a quote by an LGBT young adult reflecting on her adolescence:

> the scars that that period left within were more of stepping stones that helped me grow as a person. LGBT F

A resilient self is also mastered through political consciousness,

> I was the one who had to change to learn how to function well and at the same time I had to push for my rights as a human being and to try and change things that could be changed. Disabled person M

> I also see myself working with other disabled people for my rights. Disabled person M

Despite the reduced power that being in a stigmatised situation may place young people, the successful negotiation of risk trajectories can translate in the development of a resilient self and a successful negotiation of the passage to adulthood.

NOTES

[i] 'Passing' is a term used by Goffman to refer to the process of gaining access to a group or social category by camouflaging one's group origins. This is possible when the characteristics which identify the threatening position are easily hidden (Breakwell, 1986). Goffman writes how with passing the issue becomes "to display or not to display; to tell or not to tell; To let on or not to let on; to lie or not to lie; and in each case, to whom, how, when and where" (1963, p.57).

[ii] A schema is a "cognitive structure that represents knowledge about a concept or type of stimulus, including its attributes and the relations among those attributes" (Fiske and Taylor, 1991, p. 98) Schemata facilitate top down conceptually driven processing. Stereotypes are a consequence of the use of schemata and are activated by cues in the environment or the target.

[iii] M refers to male.

[iv] F refers to female.

[v] The term 'normal' is used by Goffman (1963) to distinguish between those who possess a stigma and those who do not. Goffman does not problematise "normal' and here it is used in this sense. Passing refers to a situation where, in order to avoid anticipated stigma, an individual with a disability for example, actively presents themselves as someone who does not have a disability, or a history of a disability (Goffman 1963; Higgins 1992). Covering is used by individuals who may not be able to "pass" as "normal" but nevertheless wish to minimize the impact of their disability (Goffman 1963; Higgins 1992).

[vi] In the villages and towns of Malta most persons know each other by name and also know many personal details about each other. The strong communitarianism is clearly manifested in the active participation in the annual village festa (Boissevain, 1969). Life in Maltese towns and villages has a quality of intimacy not found in metropolitan cities. According to Bailey (1971, p. 5) "It is very hard to mind your own business if you live in a village. It is hard even if you were not born there and have come to live in the village as a stranger. It is impossible if you are local born and bred, and if half the village consists of your kinsmen and the other half went to school with you". The lives of people in Maltese urban arrangements are centred around their families, children, church and local community. Indeed the Maltese could be characterised as 'urban villagers' (Gans, 1962). Life in Maltese communities results in multiplex relationships which makes the consideration of one's honour a matter of grave importance. The small size of the island and the density of the network of relationships mean that individuals meet over and over again in the process of exercising a variety of roles. The presence of a strong 'moral community' is felt in Maltese towns and villages as people are prepared to make judgements about one another. This often takes place through the mechanisms of gossip. O'Reilly Mizzi writes 'if your behaviour deviates from the norm you cannot move to another part of the community and start again. Your reputation will follow and catch up with you very quickly'. (1994:375). Several Maltese communities have the highest population density in all of Europe. An important consequence of Malta's small size is a high degree of social visibility.

[vii] According to the contact hypothesis, true acquaintance lessens prejudice (Brown, 2000; Allport 1954) Contact under certain conditions, such as equal status, cooperation towards a common goal, and institutional support, will create a positive intergroup encounter, which, in turn, will bring about an improvement in intergroup relations. Knowledge alone will not cause people to negate their prejudices and stereotypes about others, since they are very likely to accept only those pieces of information that fit into their preconceived schema of the world.

[viii] According to the Archdiocese of Malta Secretariat for Catechesis, June 2008, "A significant part of the population is involved in organizing and participating in local village feasts. In 2005, some 9000

persons were involved in the organisation of local village festas, and 5658 persons participated in Holy Week processions. In these last four decades, contrary to the predictions of previous sociological studies, there has been a growth in the celebration of feasts. Boissevain explains that this is due to the growth of the economy and especially to the desire to reaffirm the bonds of community".

[ix] According to the Blackwell Handbook of Social Psychology "Discrimination is differential treatment of groups because of their group labels (2007, p. 346).

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MONICA RANKIN

CHAPTER 7

LATIN AMERICAN WOMEN AND INCLUSION IN PUBLIC AND PRIVATE COMMUNITIES

Gender relations in Latin America are based on long-standing, yet constantly-evolving cultural norms and social expectations. Those norms and expectations are unique to Latin America and do not always fit the concepts of feminism, individual rights, and marginalization that often dominate discussions of women's issues, gender relations, and the notion of inclusive communities in other areas of the world (Guy, 1994; Abbassi & Lutjens, 2002). Women's place within cultural gender expectations in Latin America is tied to centuries-old Iberian customs, a pervasive Catholic culture, and laws designed to preserve and protect those traditions. This chapter will historicize the role of culture, customs, religion and/or laws on inclusive communities through the lens of Latin American gender relations. Using examples primarily from Mexico and Argentina – two nations with a relatively well-developed scholarly literature on gender relations – I will trace colonial concepts of patriarchy and inclusivity within private and public communities through reforms to family laws in the nineteenth century. I will conclude by outlining new concepts of inclusivity in the public community through campaigns for suffrage and other political rights in the twentieth century.

Scholars of Latin American women's history have not examined the concept of "inclusive communities" in the way contributors to this volume are currently doing. Nevertheless, many historians actively engage in research that considers how women fit within social units (French & Bliss, 2007). Scholars of women's history in Latin America, generally agree that the family has historically been the foundational unit of organizing society. This differs from other parts of the world such as the United States and Western Europe where social scientists and other scholars of women's studies have more fully examined women's place in inclusive communities. U.S. and European scholars often consider women's studies in the context of liberal theory, in which the individual, rather than the family, is the defining unit on which society should be organized. Those discussions of "inclusive communities" often revolve around the notion of individualism, equality, and inherent social rights. In Latin America, the ways in which women are either marginalized or included in the larger community, are often based on cultural understandings of intimate relationships within the family. Therefore, the ways in which many Latin Americans define "inclusion" or "marginalization" are

A. Azzopardi and S. Grech (eds.), Inclusive Communities: A Critical Reader, 103–117.

often quite different from the ways in which other cultures approach those concepts. As a result in the discourse of Latin American women's movements, the notions of "rights" and "equality" have generally been tied to the well-being of the family instead of the emphasis on individual liberties in liberal ideologies (Miller, 1994; Lavrín, 1995). During the nineteenth and twentieth centuries, a brand of feminism specific to Latin America emerged, and through which women have demanded rights based on their role as part of the family unit. For example, many suffragists argued that women be granted the right to vote not because it was a natural right to which each individual was entitled, but rather so they could effect political change to benefit the family.

It is difficult for the historian to discern women's motives for framing their arguments around family. It is likely that some female activists truly believed that their inclusion in the political sphere should first and foremost benefit the family. Other women may have justified their demands for inclusivity by using the family as a discursive tool, knowing that the cultural confines in which they were maneuvering required such explanation. Regardless of the individual motivations behind their rhetoric, what is significant is that arguments for inclusivity based on the family, were generally perceived as less threatening and were more successful in bringing about change – however modest – than discourse tied to individualism.

Considering the historical perspective of Latin American gender roles in the broader context of inclusive communities, may provoke important and insightful new questions. Specifically, the historical relationship between Latin American women, family, and society compels us to reconceptualize and redefine both "inclusivity" and "community". I suggest framing the notion of "community" according to well-established historical models based on women, family, and communities in Latin America as public and private spaces (Johnson & Lipsett-Rivera, 1998; Socolow, 2000). Within those public and private "communities", we can also consider "inclusivity" in terms of imposed notions of "inclusion" versus individuals' own conceptions of "belonging".

The public community can be defined as political, economic, and social networks that are large and visible. These include contemporary government entities such as the local municipality, the state, and the nation. They can also include large economic and social structures such as large companies, trade unions, and religious groups. Women's inclusivity in the public sphere, is generally brought about by policies intended to foment gender "equality" throughout the public community framework. But concepts of equality are always social constructs, and the public level concepts of equality and inclusivity in Latin America have historically been imported from the outside and/or imposed from above. Campaigns to promote this type of inclusivity for women focused on large-scale reforms such as redefining citizenship, altering family law to create a codified system of equality among husbands and wives, enacting women's suffrage, and mandating equality in the workforce through uniform pay standards and equal access to employment. At times, those attempts at reform were sought in cooperation with multinational feminist organizations. More often national reform movements took inspiration from feminists in the United States and Western Europe, but worked internally to bring about change (Lavrín, 1995).

The imposition of notions of inclusivity frequently caused intense anxiety among traditional sectors of the population for several reasons. First, outside definitions of equality and inclusivity caused confusion and resentment among many Latin Americans who understood those concepts from their own cultural concepts. Secondly, creating a more inclusive community based on external and top-down definitions generally required fundamental changes to the cultural assumptions that informed the way women had traditionally fit as part of the public community. Specifically, some reformers sought a rejection of the_long-standing gender assumptions that were_based on the patriarchal norm that took root during the colonial period, and carried over to the national period after independence.

The private community is based primarily on the family unit and it has long played a vital role in notions of community and inclusivity in Latin America. Historically, the nuclear family has been the core of the private community, but the extended family has also shaped attitudes about gender roles and inclusivity; and the extended family should be considered a part of the private community. Local economic and social networks that operate as a type of extended family, can also be included in this analytical category. Small business, local cooperatives, and other closely-knit institutions in the formal and informal economy, often operated in the tradition of the family unit and attitudes about equality and inclusivity within such networks, closely reflected familial approaches to those concepts. In the private space of the family, ideas about inclusivity have more closely reflected individuals' own sense of how and where they belong. Therefore, in the private community, "belonging" may be a more accurate term than "inclusivity". Often, individuals considered the needs of the family over individual rights and liberal notions of equality. Feminists and activists in other parts of the world, may perceive this private community approach to be a continuation of the marginalization of women, but many Latin American reformers embraced the cultural conditions that privileged family and they worked within those concepts to bring about change. In Argentina and in Mexico, reforms to civil codes and eventually the realization of women's suffrage were justified as a way to safeguard the stability of the family, rather than reforms that were tied to individual rights. Over time, numerous changes at the private community level, may have been as effective – if not more effective – in creating a public community of inclusion for Latin American women as well.

COLONIAL CONCEPTIONS OF FAMILY IN THE PUBLIC AND PRIVATE COMMUNITY

The concept of family as the organizational unit of Latin American society dates back to the colonial era when Spain ruled much of the Americas from the sixteenth to the early nineteenth centuries. The Spanish concept of the role of the family was rooted in a combination of medieval law and Catholic Church doctrine. Early Spanish law actively considered the role of the familial or private community in the context of the larger public community. As early as the thirteenth century, King Alfonso X devised the *Siete Partidas*, which established strict rules for family organization, administration, and behavior (Constable, 1997). The *Siete Partidas* codified the notion of the patriarchal household, where the male head held complete power. Parental authority was defined as legal guardianship known as *patria potestad.* Spain established this as a father's right and obligation, giving mothers no formal authority over their children. Spanish law combined with Catholic tradition and the concept of patriarchy evolved and strengthened over subsequent centuries. Patriarchal order was considered the cornerstone of a stable society and the Spanish exported that system to Latin America over the course of the colonial period. In theory, the patriarchal family sustained the autocracy of the monarch, because each male head of household acted as the king's deputy. By controlling the behavior of all family members and dependents in his household, the patriarch helped to ensure social order.

Under the colonial patriarchal system, women had few options. They were to be the caregiver for the family, while the husband was expected to be the provider. Women passed from the *patria potestad* of their fathers to the control of their husbands at marriage. Many women, particularly the elite, married before the legal age of majority, and therefore were not considered legal, independent adults. They had few formal rights in the household unless they were eventually widowed later in life and they could not administer their own finances (Socolow, 2000; Seed, 1992). This restriction even applied to the dowry, which was property, cash, and other material items provided by the woman's family prior to marriage (Couturier, 1985).Women who did not marry, nearly always joined a convent, which could offer them a bit more autonomy than married life, but still kept them under the patriarchy of the church.

Patriarchy figured prominently in attitudes toward the "community" as both a public and private space and the patriarch was responsible for his family's honor within the public community. Public knowledge of indiscretions could tarnish the family name, so patriarchal authority within both the public and private community became all the more important. Theoretically, the male head of household safeguarded the private space of the family unit, so that the family's place within the public community remained honorable (Johnson, 1998). The intersection of and ambiguities between the public community – as society – and the private community – as family – set important precedents for future attitudes toward inclusivity and community. Specifically, honor could only be lost if a family's indiscretions were made public; therefore, patriarchs attempted to safeguard women within the private community of the family. When indiscretions did occur, families ensured that inappropriate private behavior did not become public by resorting to "private pregnancies", secret adoptions, and other means to hide sexual transgressions (Twinam, 2001). In reality, only elite families had the means to follow such a rigid system. Dowries, marriage ceremonies, and endowments to convents were costly and only the very wealthy could afford to sheltering women within the confines of the private community – namely the household (Twinam, 2001). Women in the popular classes, generally had to exist in the public community because they worked to supplement the family income. As a result, the number of women who could realistically uphold the patriarchal ideal was necessarily limited by financial realities (Johnson & Lipsett-Rivera, 1998; Socolow, 2000).

Patriarchal practices were maintained in colonial Latin America by customs and family behavior as described above, but they were also strengthened in colonial laws. Scholars of this era have analyzed numerous court cases that upheld the patriarchal norm. Domestic violence was often justified as a means for husbands and fathers to preserve family honor and to uphold patriarchal standards (Stern, 1997; Boyer, 2001). Husbands who killed adulterous wives were generally exonerated by the justice system, while women who engaged in "witchcraft" and other strategies to undermine their husbands' authority were punished (Lewis, 2003).

Maryssa Navarro points out that women effectively had the same legal status as slaves, Indians, and social deviants. But she also stresses that society's attitude toward women was not based on the belief that they were somehow incapable; rather it was based on a commonly-accepted notion that gendered divisions upheld important traditions and concepts about social rectitude (Navarro, 1999). These ideas have persisted for some Latin American women and a contemporary version of gendered divisions is still visible. Navarro's argument helps to explain how despite the legal and customary restrictions of the patriarchal system, some women managed to defy the limitations placed on them by patriarchal norms. Elizabeth Dore acknowledges those restrictions, but she also argues that the notion of "women without rights" in the colonial period is a myth (Dore, 2000, pp. 10-14). Dore's work and recent works of many scholars of colonial Latin American gender relations have shown that women throughout the Spanish and Portuguese empires often ran businesses, entered into legal contracts, and actively engaged in judicial proceedings. Colonial laws gave women access to property ownership, and the courts actively protected the property rights of women. Colonial attitudes toward gender roles laid an important foundation for women as part of inclusive communities in later centuries. Specifically, colonial women were most successful in fighting for property rights and other legal protections, when they framed their arguments in terms of socially-accepted gender roles. Those gender roles often stressed the obligations husbands and fathers had to protect and provide for their families. Women were expected to be obedient and to play a subservient role, but those expectations could be overlooked if the male head of household failed to fulfill his responsibilities.

Although specific applications of the patriarchal social structure evolved over the 300 year colonial period, the same basic gendered foundation persisted when most Spanish colonies fought for independence in the early nineteenth century. Some women challenged that patriarchal structure by directly participating in the wars for independence (Cherpak, 1978). Yet, after independence was secured, national governments failed to address women's inclusivity in the newly-formed national communities (Aarom, 1994; Dore, 2000). As a result, a traditional patriarchal framework remained and even strengthened throughout much of the nineteenth century.

NINETEENTH CENTURY FAMILY LAW IN LATIN AMERICA

Early nineteenth-century independence movements in Latin America were, to some extent, inspired by new ways of thought that privileged the role of the individual in society. The Enlightenment and other liberal intellectual movements introduced concepts of equality and liberty that are the hallmarks of inclusive communities in many parts of the world. These trends were particularly visible among liberal political leaders of the late eighteenth and early nineteenth centuries in the United States and Europe. Many Latin American independence and early national leaders also spoke in terms of equality and inclusivity, and they modeled new constitutions and other governing principles on those of the United States and other liberal movements in Western Europe. Nevertheless, the traditional patriarchal framework and prescribed roles for women as nurturers and providers within that framework persisted. And it was not until the rise of liberal regimes and the implementation of civil codes in the last half of the nineteenth century that Latin American leaders began placing individualism over group identity.

As Latin American leaders gradually embraced more liberal ideas about social formation, they also moved away from the colonial foundations of family law. The new nation-state stepped in to replace the Church and the crown in overseeing legal codes and other regulations governing family affairs. Beginning in the 1850s, liberal Latin American governments began passing civil codes. These new laws were based on the Napoleonic Code of 1804 and were intended to place more importance on the individual – as opposed to corporate groups – as the foundation of a successful society. First and foremost, liberal leaders wanted to challenge the traditional power of the church and other corporate groups, and civil codes primarily intended to privilege individuals over those groups. In doing so, many civil codes subverted the colonial system of patriarchy in many ways, while reinforcing and strengthening patriarchy in other ways. Adult children generally won greater autonomy under new family laws while married women found themselves under an even more restrictive patriarchal structure.

In Mexico, the Law on Civil Marriage placed the administration of marriage under state, rather than Church control. Argentine leaders began writing a civil code in 1860 and liberal leaders in Mexico and Argentina passed nation-wide legislation by the 1870s (Guy, 1991; Lavrín, 1995; Varley, 2000). Those laws privileged family as the foundation of the modern nation-state and they created a legal framework that looked to stable families to help maintain social order (Guy, 2000). Late nineteenth-century civil codes granted *patria potestad* to fathers but in exchange for formal guardianship, the laws stipulated that fathers had a legal obligation to provide basic necessities such as food, clothing, protection, and education to their children (Sloan, 2008).

The codified framework established in nineteenth-century family laws, often became the basis for later women's movements throughout Latin America, as women activists could challenge patriarchal social and cultural structures when men failed to uphold their legal obligations as providers. Women also used the civil code foundation to advocate for reform. In the late decades of the century, an incipient form of feminism began to emerge in many areas of Latin America. The movements, which might more accurately be referred to as female activism, defy simple generalization. Most movements were spearheaded by a growing cadre of middle class and educated women, but the precise nature of Latin American feminist movements. Some women activists were inspired to push for reform after being exposed to new ideas while traveling abroad. Others took advantage of expanded educational opportunities offered by liberal governments. Some women activists in Argentina took motivation from the new ideologies, such as anarchism and socialism that accompanied waves of foreign immigrants at the turn of the century (Lavrín, 1995; Sánchez Korrol, 1999).

The educated and middle class leaders of early feminism spoke in terms of "individual rights", "liberation", and "emancipation" when describing gender roles and the relationship between men and women. They pushed for gender equality through reforms to the civil codes, greater educational opportunities, and full political participation. Nevertheless, these feminists made up only a small segment of the population and their platform for reform was often viewed as radical and driven by "outside" influences. "Radical" feminists faced intense opposition from men and women alike and many of their objectives – such as suffrage and full equality under the civil codes – were not achieved for quite some time (Sánchez Korrol, 1999).

In Argentina, single mothers were not granted legal guardianship of their children until 1926. Married women only won shared parental rights with their husbands in 1985 when the conditions of *patria potestad* codified in the nineteenth century were finally abolished (Guy, 2000). In Mexico, changes to the civil code took place gradually and it was not until post-revolutionary reforms of the 1920s that significant changes were made to women's status as guardians of their own children (Miller, 1991). These reforms to the civil codes in Argentina and Mexico represent drastic changes to the fundamental structure of the patriarchal norm. Altering the basic foundation of fathers' ability to retain exclusive legal guardianship rights took more than a century because those reforms questioned the very core of patriarchal assumptions. Attempts to recast the foundations of parental authority and gender roles within the family often met stiff resistance.

Efforts to effect women's suffrage met equally hardened opposition. Traditional-minded men and women often challenged the ambitious platforms of the more progressive early feminists on the grounds that enacting drastic reforms through the granting of suffrage, fundamentally changing family law, and other such reforms would threaten the stability of the family. They argued that the traditional gender roles that women played, served a vital function by ensuring a nurturing environment where moral fortitude could be reinforced through a stable family structure (Miller, 1994), As a result, Latin American women activists of the nineteenth century, often prioritized family reform – within the private community – over individual rights – within the public community.

Other women activists were members of the growing working class that was expanding as early forms of manufacturing and industrialization took root in many cities. They partnered with middle class women who championed social reform on the basis of morality and the general well-being of the public. Working class and moral activists spoke in terms of equality and individualism, but more often they associated their calls for legal reform with notions of protection, basic needs, and other paternalistic concepts that could have been lifted directly out of civil codes (Guy, 1991; Lavrín, 1995; Sánchez Karrol, 1999). These reformers did not target the civil codes directly, as this would amount to reforming the legal concepts of family and attempting to alter what government leaders considered to be the foundation of society. Instead, they pushed for small, local, and immediate changes – primarily in laws dealing with labor and the welfare of children –often using the legally and culturally accepted notion of family as justification for their cause. Argentina's earliest civil codes allowed the state to punish fathers for failing to provide basic necessities for their children (Guy, 2000).

Over subsequent decades, activists successfully pushed for other reforms aimed at protecting children. They took up issues such as child abandonment and child labor by challenging the *patria potestad* of fathers on the grounds that unfit parents failed to fulfill their legal obligations as providers and protectors. In doing so, reformers argued that when parents – namely fathers – failed to uphold the responsibilities laid out in the civil codes, the state should take over *patria potestad* of those children. An Argentine law enacted in 1919 gave the state the power to remove children who had been accused of a crime from parental custody. The creators of the law justified their actions by arguing that children engaging in criminal behavior clearly had not been provided the protective and nurturing home environment required under family law. New government institutions also emerged to care for abandoned and delinquent children.

Government-run reform schools opened, and leaders formed the Patronato Nacional de Menores to oversee the administration of the schools. At the same time, the Sociedad de Beneficencia that had been opened by the government of Buenos Aires in the 1820s took on a greater role as provider of social services to the nation's orphans. Between the 1870s and the 1890s the number of orphans in Buenos Aires nearly doubled. Much of that increase was due to expanding vigilance by new government institutions and their willingness to claim *patria potestad* over children of unfit parents (Guy, 2000). The willingness of the Argentine government to intrude in the private community through family law illustrates precisely how much the state valued the role of a stable family as the cornerstone of society. It also demonstrated to feminist reformers how they could frame their demands for inclusivity based on the family's role both in the public and private community.

In 1926 Argentine lawmakers gave married women the ability to choose their own professions and allowed them to maintain greater personal control over their own wages. The justification for these changes was once again closely tied to the discourse of familial responsibilities laid out in family law. Married women in working class and poor families generally sought employment outside of the home because of economic necessity – because the male head of household alone could not provide for all of the family's needs. Women who had to enter the workforce to supplement the family income often found themselves in low paying positions in industries with sub-standard safety conditions and other dangers. Allowing women to choose their own professions offered them a degree of protection that was implied in family law. By giving women control over their wages, the 1926 reforms also prevented husbands from squandering their wives' earnings on alcohol, prostitutes, and other vices (Guy, 1991). Once again the justification for those changes was often lifted directly out of the language in the civil codes that required parents to protect their children and provide for the basic needs of the family. By granting women greater control of their own finances, the government effectively enhanced women's ability to fulfill those legal familial obligations.

Reforms to family law represented modest gains for women in Argentina and elsewhere in Latin America in the early twentieth century. But more significantly, the reforms illustrate an important melding of private space and public space in the state's concept of "community". Through their roles as mothers, women were now more inclusively incorporated into the public community – conceived as the "national family" (Pateman, 1988). In subsequent decades, some government leaders and activist reformers began to consider women's citizenship in terms of motherhood. At the same time, women increasingly viewed their relationship with the state as one tied to family and many of them perceived their own rights as "family rights".

INCLUSIVITY AND SUFFRAGE IN TWENTIETH-CENTURY LATIN AMERICA

The Mexican Revolution of 1910 created a unique opportunity for women to demand greater inclusivity in communities on various levels – the family, the local community, and the nation. Between 1910 and 1920 a bloody war pulled hundreds of thousands of Mexican men into the service of revolutionary armies. As husbands, fathers, and brothers left home to join the revolution, women and children often accompanied them. Many women became camp followers, providing basic services directly to their lovers, husbands, or other family members (Tuñón-Pablos, 1999; Soto, 1990). They were the cooks, laundresses, and nurses for soldiers in revolutionary armies. Although the war tore families apart and disrupted the household, the importance of family remained, and participants in the war found ways to create a sense of normalcy in new family structures. Many times women in revolutionary armies carried several small children along with them as they cared for men in the camps. If the husband or lover were killed in battle, his woman would attach herself to another soldier and the system of providing care through a family unit continued. Camp followers were invaluable, particularly in the smaller revolutionary armies which, unlike the national army, did not have formal support infrastructure built in to the military framework. The smaller militias relied on women to provide many essential services.

Soldaderas played an even more active role in military engagements (Salas, 1990; Linhard, 2005). They carried a weapon and marched onto the battlefield alongside male soldiers. In Pancho Villa's army, for example, women regularly fought and died in major battles just as male soldiers did. They held leadership positions within the ranks of the Villistas and many revolutionary leaders considered them to be some of the best trained and most disciplined soldiers available (Katz, 1998).

The structure of the family unit and women's roles within the family were dismantled and redefined during the revolution. The family's function as a social foundation remained, but the lines between private and public community were increasingly blurred. In the midst of that ambiguity, women also redefined their own concepts of inclusivity as they stepped out of traditional gender roles tied to the private household community and took on more public roles for the well-being of the family unit.

Each camp follower and *soldadera* surely joined the revolutionary armies for her own personal reasons. Nevertheless, it is worthwhile to note that "family" figured prominently in the discourse of many women even as the concept of private and public community became blurred. The immediate needs of the family were first and foremost on the minds of most camp follower and *soldaderas*, and it was those immediate needs that called them to the battlefield (Salas, 1990). When husbands and fathers left to join a revolutionary army, there was frequently very little left for the family at home, especially for Mexico's agrarian and poor classes. Without the male head of household, families lost their main source of income and their best opportunity for protection from the lawlessness and other perils that the revolution brought to the countryside. Instead of staying behind and trying to guide the family through a dangerous and uncertain future, many women gathered their children and joined their men in the revolutionary armies as a way of keeping the family together and providing for the family's needs. Many *soldaderas* viewed their participation in much the same way (Macías, 1982). The repressive conditions created by dictatorship prior to the revolution threatened the well-being of their families, and fighting for reform allowed them to fulfill familial obligations. The war itself also threatened the well-being of the family and many women soldiers saw fighting as a way to help resolve the conflict in favor of their cause and restore stability to the nation and the family. Entire families still engage in activities within the public community in an effort to ensure the well-being of the family. Contemporary social and political protests often attract men, women, and children and members of the family perform their household roles at those engagements – with women often cooking and caring for children. Yet women are more likely to occupy leadership roles in those movements today that in the 1910 Revolution. The unrest that erupted in Chiapas in 1994 drew the participation of entire families and women often played prominent leadership roles in that movement (Eber & Kovic, 2003).

What is equally significant about women participants in the Mexican Revolution in terms of assessing inclusivity is the way women interacted with post revolutionary policies after the war was over. A vibrant and active women's movement emerged in Mexico on the heels of the revolution and one of the main goals of the movement involved securing full citizenship rights and suffrage for women (Macías, 1982; Soto, 1990; Mitchell & Schell, 2006). Women reformers also wanted to enact major transformations to the civil code to provide greater gender equality and more liberties to women. The incipient feminist campaign was inspired by women's active participation in the revolution and by language of inclusivity contained in the revolutionary Constitution of 1917.

By emphasizing suffrage and citizenship, women activists set up a discourse of inclusivity based on public political entities – municipality, state, and nation. But Mexico's post-revolutionary women's movement did not attract participation by most of the women who had served as camp followers and *soldaderas*. Some female revolutionaries joined forces with the feminists, but most of the women who had actively participated in the revolution returned home with their families after the war and did not fight actively for political reforms in the public sphere (Soto, 1990). Instead, post-revolutionary feminists were primarily middle class and educated women, many of whom were part of a small but growing professional class. Studies show that some regional women's organizations made modest gains. Yucatán governor Salvador Alvarado (1915-18), for example, sponsored Mexico's first feminist congress which convened in 1916 and debated many women's issues from a socialist perspective (Olcott, 2005). In subsequent years, feminist discourse found a receptive audience among Yucatán's ruling elite.

Nevertheless, the success of Yucatán's feminists was not sustainable and expanding those gains to the national level was not easy. Women's suffrage had been addressed by the writers of the revolutionary Constitution of 1917, but many delegates argued that women were not well-suited for politics (Olcott, 2005). Women's activists were more successful advocating for micro-level reforms within the private community which frequently used defense of the family as justification. Temperance advocates, for example, launched a campaign in Mexico City in 1923 that eventually expanded nationwide. By the end of the decade, the campaign had grown to include not only information about the perils of alcohol, but also instruction on household duties and other practical tasks typically performed by women. Organizers of this campaign won the support of government officials by arguing that their program gave women the necessary skills to fulfill their duties and wives and others, making them more productive members of the household and ultimately the nation (Olcott, 2005). In this sense, reformers enjoyed the support and cooperation of the revolutionary government when they advocated for inclusivity in terms of the private community, where relatively small changes to ensure familial stability would not fundamentally alter long-standing gender structures in the public community. Middle class reformers accepted those small victories but they were seldom satisfied with inclusivity within the familial community alone.

Throughout the twentieth century, Mexico's revolutionary government borrowed feminist reformers' language and strategies by crafting a discourse of the nation as a "revolutionary family", in which the president played the role of the patriarch caring for loyal citizens, or member of the family. By establishing such a discourse, Mexico's revolutionary party was able to blur the lines between the public and private community to create a sense of loyalty, belonging, and inclusivity that kept the party in power for more than 70 years. Government leaders passed land reform, educational legislation, and labor laws employing rhetoric that positioned those mandates as a part of a father's duty to care for his children.

The idea of a national family became a part of women's suffrage movements in both Mexico and Argentina. The Argentine senate regularly defeated female suffrage bills between 1911 and 1946. Women's activists in Mexico nearly achieved suffrage in 1938, but the movement lost momentum as reformers' rhetoric moved away from the family as a foundation of society (Olcott, 2006). Early activists in both nations demanded profound changes that would have fundamentally transformed the deeply-rooted patriarchal traditions that were such an important foundation of family structures. In Mexico, inclusivity defined as gender "equality" in the economic sector through land and labor reforms and demands for political equality through suffrage and government representation were seen as a radical call for change. As the feminist message generated intense opposition among traditional-minded groups, many activists reframed their demands to account for traditional gender roles.

President Juan Perón and his wife Evita reshaped the discourse of women's political participation in Argentina (Carlson, 1988; Sánchez Korrol, 1999). Unable to bear children of her own, Evita warmly and publicly took on the role as mother to the nation, once again merging the concept of private and public community. She became a powerful advocate for women's causes that were presented as an extension of the traditional maternal and familial role. Evita mobilized poor and working class women under the Peronist Women's Party (Bianchi & Sanchís, 1988). The group sponsored a number of initiatives to create child care centers and educational program for working women. Even critics of the Peróns had a hard time opposing women's political mobilization when it primarily encompassed such maternal and familial duties.

Similar arguments in favor of women's suffrage emerged in Mexico and Argentina in the 1940s. Activists did not promote the cause based on the concept of an inclusive community defined by gender equality. On the contrary, they insisted that men and women necessarily performed different social functions and that it was precisely those differences that made women's suffrage ultimately good for the nation (Bianchi & Sanchís, 1988; Mitchell & Schell, 2007). Women's roles as mother and caregiver in the family made the family more loving and nurturing. Just as those qualities helped to foster secure and stable families, so too would they build a strong and enduring nation through women's political participation. By the early 1950s, women's suffrage was passed into law in both Mexico and Argentina.

CONCLUSIONS

Examining the historical role of women and families in Latin America suggests new ways to consider the concepts of inclusivity and community. "Community" in Latin America has generally been defined as both a private space tied to the family and a public space tied to larger political, economic, and social networks. Historically, the family has been considered the cornerstone of a stable and successful society. As the political landscape has evolved from the colonial period to the era of nation-states in the nineteenth and twentieth centuries, the distinction between private and public communities has become increasingly ambiguous. The blurring of the lines between public and private communities has created a unique discourse about inclusivity for women within those communities. Many Latin American women have traditionally viewed their place within the family as one of "belonging" rather than an externally-imposed notion of "inclusion" based on equality and individual rights. But as the public and private community space for those women continually intersected, concepts of "belonging" and "inclusivity" also merged. Particularly in the twentieth century, women activists in Latin America began demanding greater individual rights and greater equality through suffrage, political participation, equality in the workforce, and other reforms. Many times they framed their arguments according to their understanding of their role in the private family community but they placed those arguments squarely within the public sphere.

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TOSHIJI KAWAGOE AND AKIHIKO MATSUI

CHAPTER 8

ECONOMICS, GAME THEORY AND DISABILITY STUDIES

Towards a fertile dialogue

This chapter analyses inclusive communities by applying economics, mainly microeconomics and game theory, to disability studies. First, we provide a brief overview of the basics of economics and the key concepts in game theory, including strategic complementarity and network externality, which not only make a departure from the standard price theory but also respond to some of the misguided criticisms against economics, particularly market fundamentalism and the supremacy of the rational agent in economic analysis. Economics affirms the modern view of a human being as an autonomous, rational decision maker. However, some, if not all economists, recognize that in the real world, there is no human being who has such cognitive/computational capacity; rather, human beings are actually influenced by their surrounding socio-cultural environments, and develop some boundedly rational behavior or blindly follow established conventions to resolve the many problems they face. We explain a recent game theoretic attempt in which, first, discrimination emerges as an equilibrium even if there is no inherent factor, and then, if one tries to understand such an equilibrium based on one's limited experiences, prejudices may emerge. The endogenous emergence of stigma, stereotypical labeling against a certain group of people as in Goffman (1963), is explained (see also Marilyn Clark's contribution in this book). The capability approach (described below), may be conducive for incorporating the idea in the social model of disability into economics and can provide us with an insight into the existence of discrimination resulting from a disabling society lacking appropriate accommodation. In regard to the social model of disability, we also point out that the dichotomy between the society and individual that is implicitly assumed is problematic from the viewpoint of economists who adopt methodological individualism as a research methodology. Overcoming such a dichotomy in disability studies seems to be necessary to initiate a constructive dialogue for building truly inclusive communities using economics and game theory.

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ECONOMICS AND DISABILITY STUDIES

According to the standard textbook of Kreps (1990, p. 3), "Microeconomic theory concerns the behavior of individual economic actors and the aggregation of their actions in different institutional frameworks". This one-sentence description introduces four categories: the individual *actor*, traditionally either a consumer or a firm; the *behavior* of the actor, traditionally utility maximization by consumers and profit maximization by firms; an *institutional framework* that describes what options the individual actors have and what outcomes they receive as a function of the actions of others, traditionally the price mechanism in an impersonal marketplace; and the mode of analysis for modeling how the various actors' behaviors will aggregate within a given framework, traditionally *equilibrium* analysis" (p. 3). Kreps went on to state that the purpose of microeconomic theory is to foster "a better understanding of economic activity and outcomes" (ibid., p. 7). Recent developments in game theory, however, have expanded its scope from traditional situations in marketplaces to a variety of situations. In particular, "Game theoretic analyses have been extremely fashionable in microeconomic theory since the mid-1970s because such analyses are quite precise with regard to the institutional framework and because they help us see how institutions matter" (ibid., p. 13).

Note that at least in this chapter, we use the term disability studies to refer to the social model of disability represented by Oliver (1990), Barnes et al. (1999), Ishikawa and Nagase (1999), Hoshika (2007) and Sugino (2007). The social model of disability differentiates between impairment and disability where impairment is a collection of physical, intellectual or mental functional limitations, while disability refers to the disadvantages induced by the lack of appropriate accommodation by the society/community. Emphasizing that the source of disadvantages for disabled people is not impairment but disability, this model has helped provide disabled people with the grounds for fighting for reasonable accommodation which should be provided to them by the society/community, and highlighted the need to establish the dignity and rights of disabled people.

Microeconomics, especially game theory, can provide disability studies with a firm theoretical foundation since game theory clarifies who are actors, what are their behaviors, what are the institutional constraints they face, and, most importantly, how actors' well-being might differ under different institutional arrangements. In the context of disability-related issues, economics and game theory can regard disabled people together with non-disabled people as actors, specify their respective individual characteristics, describe institutional constraints, and analyze the consequences. What is lacking in mainstream economics is that disabled people are not regarded as actors. Including disabled people in economics, offers the possibility of a relationship between economics and disability studies, in the sense that both of them claim that institutions matter.

CHAPTER 8

GAME THEORY IN ECONOMICS: A DEPARTURE FROM NEOCLASSICAL ECONOMICS

Allocation of scarce resources is a fundamental economic problem that every society must face. The fundamental theorem of welfare economics states that the market is the most efficient institution for allocating resources and the most efficient institution for aggregating information dispersed among agents. These properties are rigorously proven in modern economics literature.[i] In other words, Adam Smith's claim about God's invisible hand working in market exchange does have a firm mathematical foundation.

Until the 1970s in the academic society and 2008 in the real society, this type of economics, neoclassical economics, dominated. Its basic premise is that if markets work well, the price adjustment mechanism will yield the efficient state. Its implication is twofold. First, we need to fight against various regulations that limit the self-adjusting power of the market. Second, since equity may not necessarily be attained through the market mechanism, different channels such as the redistribution of income are needed. This created a constant tension between efficiency and equity. Both economists and non-economists believe that the trade-off between equity and efficiency is unavoidable—any measure to enhance the welfare of the poor is detrimental to the efficiency of the economy.

In the 70s and 80s, a new line of research using game theory emerged. Game theory is a relatively new field of study which investigates human strategic interactions in a logical manner.[ii] Game theory quickly became the standard analytical tool in economics. The biggest contribution of game theory to economics is that it showed that markets do not always work well even if we clear all the institutional obstacles such as the distortion created by monopoly and the tax system. Game theory identified a number of key features of the real economy that prevent the market mechanism from attaining efficient outcomes.

COMPLEMENTARITY AND NETWORK EXTERNALITY

This section introduces two key related concepts in economics – complementarity and network externality. Network externality can be explained by using a public transport system, for example, an underground railway system. If only one station, say, *A*, is accessible by wheelchair, the system is useless for wheelchair users since the purpose of using the underground is to go to another station. Therefore, we need at least two stations to be accessible. But again, unless one uses these two particular stations, say, *A* and *B*, the system is still not adequate. Accommodation for only one connecting pass between *A* and *B* can be provided. What happens if three stations, *A*, *B* and *C* become accessible? There are now three connecting passes that can be accommodated. In general, if n stations become accessible by wheelchairs, at a maximum $n(n-1)/2$ passes can be accommodated. In other words, the accessibility of the underground system increases at a rate faster than the number of stations with wheelchair access.

One may correctly point out that the accessibility of underground railways is not enough for those who wish to move around by themselves. We need more, of course. We need accessibility for buildings, streets, buses, and so on. Some economists call such a situation institutional complementarity (Aoki, 2001), since multiple institutions, such as the underground railway system and buildings, have to complement each other in terms of accessibility.

Another notable example can be found in the New York (NY) subway system. In the 1980s, it was considered dangerous to travel on the NY subway. Robberies were common, and the train cars were covered with graffiti. In the late 80s and early 90s, there was a dramatic change. In order to make the subway safe, city administration increased the number of police on board the trains. It also changed the materials used for train car bodies to make it easier to erase graffiti. As a result, the NY subway became a fairly safe means of transportation.

To see the relationship between the number of robberies and the number of policemen, consider the following illustrative model. Some people commit robbery if the rate of arrest is sufficiently low. Different (potential) robbers have different thresholds. Suppose, for the sake of illustration, that their thresholds are distributed uniformly over the interval of 0 and 1 where one means 'certain arrest', while zero means 'no fear of arrest'. If the rate of arrest is x, which is a number between 0 and 1, then the $1 - x$ fraction of the potential robbers will be better off when committing theft; the remaining x fraction would do better to desist. Therefore, the number of thieves is endogenously determined as a function of the arrest rate. However, this number x itself is in turn determined by the number of robbers. Suppose that x is determined by m (> 0), the number of policemen as well as n, the number of actual robberies. To simplify the calculation, let $x = m/n$. If n is greater than $1 - x$, then n gradually decreases, while if n is less than $1 - x$, n gradually increases over time: $dn/dt = a(1 - x - n) = a(1 - m/n - n)$, $a > 0$ where dn/dt is the marginal increment of n over time. In this dynamic, there are potentially two stable rest points, or equilibria, $n = 0$ and $n = n^* = [1 + (1 - 4m)^{1/2}]/2$, where the latter appears if $1 - 4m > 0$ or $m < 1/4$ (note: an equilibrium is an outcome from which nobody has an incentive to deviate). There is also an unstable equilibrium, $n = \underline{n} = [1 - (1 - 4m)^{1/2}]/2$, if $m < 1/4$ holds. This number $\underline{n}$ serves as a threshold. If n is less than $\underline{n}$, then it pays not to commit the robbery and vice versa. Therefore, if we stand back and do nothing while n increases beyond the threshold, the system then moves toward n^*, the bad equilibrium.

The implication of the above argument is significant. Unlike the simple externality,[iii] which can be corrected through direct intervention measures such as taxation, network externality and complementarity pose an immense challenge to the market economy: Adam Smith's invisible hand does not necessarily work. Examples other than the above anecdotes are abundant. The recent financial crisis is one of the latest and severest examples. If many investors want to take their money out of an investment bank, then people rush into this conduct, since the swifter one moves, the higher is the chance of securing one's investment money. This leads to a so-called bank run. What happened in 2008 was this fear of a bank run in non-commercial-bank financial institutions, which were not regulated as stringently as commercial banks. This ‘bank run’ corresponds to one of the two equilibria, while ‘no bank run’ corresponds to the other. What the governments and central banks have been trying to do is to avoid the bank run equilibrium by injecting trillions of dollars into the financial sector.

As is mentioned already, in the realm of disability, a similar phenomenon can be seen in terms of accessibility. If all disabled people remain trapped in their homes, then there is no need to accommodate them, and therefore, no action is taken, say, by the government. Thus, we need a critical mass to obtain a different equilibrium where the needs of the disabled people are properly accommodated.

RATIONALITY IN ECONOMICS AND MARKET ALLOCATION

We have seen that game theory has made a significant departure from neoclassical economics. However, both neoclassical economics and game theory have a common assumption with regard to individual decision making. In neoclassical economics, it is often assumed that a consumer chooses a combination of goods and services optimally, i.e., to maximize its utility, or the subjective evaluation of the goods and services to be traded, subject to a budget constraint. By aggregating such consumer choices, market demand functions are derived, and then market prices and allocation are determined. Many, if not all economists, hold that individual choice by a rational consumer, or self-determination of the autonomous agent, is a cornerstone in economic analysis.

But many social scientists other than economists are dubious of the assumptions of a rational decision-maker and market efficiency in economics. That is, they claim that human beings are more irrational than what is assumed in economics. Such people often ask: but are human beings actually capable of making such an optimal choice and deciding everything by themselves? In most of the cases in our daily life, we usually decide routinely or follow an established habit of the pattern of behaviors. If we had to determine everything in our daily life, it would be a rather formidable affair.

Let us consider a company in negotiation over a certain contract with its business partner. Since there could exist unpredictable and unforeseen events in the future, the company cannot explicitly write every contingency in the contract. In this sense, such a contract is not optimally designed, i.e. it could be rewritten in the future. These considerations lead us to the concept of bounded rationality in economics. This means that while economic agents try to be rational decision makers, they should be satisfied at a sub-optimal state because some constraints such as the uncertainty of future events and the computational limitation of the agents cannot be overcome.

In order to overcome such limitations, we develop various institutions, rules and tools to reduce our computational cost, searching cost and future contingency. With the help of such rules and tools, we can choose more efficiently. But we usually do not doubt the legitimacy of such rules, often blindly accepting the many established rules and habits in our society. In this sense, our choices based on such rules and customs are not by self-determination but by definition. But negation of self-determination doesn't necessarily lead us to an inefficient state. In the following, we will show an example where even though economic agents behave irrationally, efficient allocation is achieved in a competitive market.

In experimental economics research, as Nobel Prize-winning economist Vernon Smith proved in his pioneering work, even if many basic assumptions that have been believed to be necessary are absent, efficient market allocation is achieved in the laboratory experiment[iv]. Further, Gode and Sunder (1994) show that efficient market allocation can be achieved even with agents who choose their prices at random within the budget constraint. They call such type of agents zero-intelligent agents, because they behave randomly and thoughtlessly. Basically, this model captures the existence of noise traders in the financial market. Such noise traders behave as if they are random decision makers. But most of us behave similarly when information asymmetry and computational complexity exist. An important thing to notice here is that even when the market is full of such zero-intelligent traders, God's invisible hand powerfully drives everything towards a competitive equilibrium. Thus, the connection between market efficiency and rationality of agent is much weaker than what is assumed in traditional economics textbooks.

Thise research shows that assuming an agent to be rational is not necessary for proving market efficiency. In fact, as we have already pointed out, people are not rational decision makers, but followers of the established institutions and habits with limited computational power and under information uncertainty. But these aspects cannot deny the efficiency of market allocation. Even if people are random decision makers, market allocation can be efficient.

Universal design (UD) is an attempt to produce products available to and usable for any person. If the product is designed specifically for use by certain people, then producing such a product is very costly because demand for this product is small. But if we produce a product suitable for a wide range of people, then the economy of scale is at work, i.e., the product can be produced at a lower cost per unit than otherwise. This may provide disabled people with certain benefits when goods and services are available to them more easily and at a lower cost. Such an effect is called the economy of scale. Thus, while according to disability studies, market and capitalism are the causes of socially constructed disabilities, the market can be used to improve the life conditions of disabled people.

A similar argument can be made for technological progress in our society. In many cases, the technology developed and adopted in our society, excludes disabled people. For example, deaf people are unable to use the telephone. So, should we criticize the telephone stating that it is oppressive to Deaf people and that it should therefore be no longer used? Definitely, not! Even if deaf people cannot achieve any direct utility from using the telephone to communicate, the telephone network enables them to connect to the Internet. In this way, the Internet provides people, including those who are deaf, with access to communication and a wide range of information resources. In this sense, the telephone indirectly enables deaf people to communicate through the Internet. Noticing such an indirect effect is crucial for the evaluation of technologies and institutions in our society.

Of course, we should not ignore that the market may enforce ‘normality’ for us. Competition in the market drives everything towards normalization and standardization, and this sustains the values of ‘normal’ and ‘standard’, while excluding those perceived as ‘abnormal’, such as those who are disabled. Then, how to include disabled people in our society is another big issue that needs to be looked into. As disability studies based on social constructionism point out, such distinction between ‘normal’ and ‘abnormal’ is arbitrary and relative to the majority in the society. But awareness of this fact may not be enough to make our society inclusive for disabled people in order to overcome such prejudice. Social constructionism gives us awareness of the fact, but we need to reconstruct our society to make it inclusive of disabled people. For this to happen, as we have already discussed, awareness of network externality and complementarity is vital. Of course, challenging the dominating value system is necessary before we achieve our goal of reconstructing our society. In the next section, we discuss this issue further.

CAPABILITY APPROACH AND SOCIALLY CONSTRUCTED PREFERENCE

Consumer’s preference is a fundamental concept in economics. Sometimes it is assumed that such preference is given inherently and naturally. But it isn’t; it is historically and socially constructed. Let us consider the *capability* approach proposed by Nobel Prize-winning economist Amartya Sen (1982, 1985). The capability approach is a theoretical basis for the Human Development Approach which gave rise to the Human Development Index (HDI). HDI is a composite statistic used as an index to rank countries by level of human development. It was originally developed by UNDP. It incorporates some things that are not measureable by GDP, such as the rate of literacy, into welfare measurement. Sen proposed it as a critique of consequentialism and utilitarianism found in economics.

Here, consequentialism means an implicit assumption made in economics that as long as the consequences are the same, process and motivation should not be questioned. Utilitarianism is an idea that only utility gained from consumption of goods and services determines one’s welfare. With the capability approach, when it comes to one’s welfare, we should consider the level of education and accessibility because if the level of education differs among people, even though the same goods are consumed, utility gained from these goods can differ. For example, let us consider providing text in Braille or digital format. If text in such formats is not available, a person with a visual impairment is denied the opportunity to gain knowledge, pleasure from reading and often an education. Even if such a person has access to financial resources to buy many books, if such services are not available, the person is robbed of the opportunity to gain utility by reading books. This means that the obstacles to providing text in Braille or digital format should be removed; this will enable the person to achieve utility from reading.

Therefore, when people have different levels of education and accessibility to various resources, even though they have the same budget, their welfare can differ. Thus, being a consumer, or enjoying utility from consuming goods and services, or having a preference, are not inherent in human nature but socially constructed. HDI tries to overcome this difficulty by introducing such factors into welfare measurement. Nussbaum (2000) and Mori (2008), respectively, incorporated gender and disability issues into HDI measurement. The capability approach can demonstrate the existence of discrimination resulting from a disabling society lacking appropriate accommodation (see Grech, 2009). Furthermore, when we design welfare policy based on the capability approach, we can expect that the state of disabled people is taken into account. In this way, the capability approach can provide an effective tool for building inclusive communities.

EMERGENCE OF PREJUDICE FROM DISCRIMINATION: INDUCTIVE GAME THEORY

Criticizing itself, game theory has developed in various directions. This section briefly discusses Kaneko and Matsui (1999) who hold that preferences do not exist in their fullest form at the outset, but endogenously emerge through experiences. Kaneko and Matsui studied what they called the festival game, which has two stages. In the first stage of this game, a population, which is divided into two ethnic groups, *A* and *B*, simultaneously choose a location, 1 or 2, to visit. Let group *A* be the majority and group *B*, the minority. In the second stage, upon observing the ethnic composition of the participants at one's own location, each person decides whether he/she will play in a friendly or an unfriendly manner. If a person takes unfriendly action, then his/her level of satisfaction (payoff, henceforth) is at the default level of zero. On the other hand, if the person takes friendly action, then – since this is a 'festival' – his/her payoff depends upon the number of friendly people in the same location. The greater the number of friendly people, the higher the payoff to the person who takes friendly action. In other words, the festival game exhibits complementarity. If no other people take friendly action, the payoff from taking friendly action is less than that from taking unfriendly action. Here, we assume that even the smaller ethnic group is so large that the group by itself can reach a critical mass beyond which people taking friendly action receive a positive payoff. In order to obtain a clear result, it is assumed that the payoffs do not depend, among other things, upon the demographic composition.

Kaneko and Matsui (1999) broke down the analysis of this game into two parts, the standard equilibrium analysis and a new analysis, called inductive game theory. First, the simplest equilibrium is the one in which everyone goes to the same location and takes friendly action. This is a unification equilibrium. Another simple equilibrium is the one in which people choose a location randomly, and wherever they may go, they take unfriendly action. These are equilibria since people would like to take friendly action if many others do, and vice versa.

Yet, there is another equilibrium, which may be called a segregation equilibrium. In this equilibrium, the two groups of people go to different locations:

group *A* people go to, say, location 1, while group *B* people go to location 2. They take friendly action as long as they observe people only from their own ethnic group. For this situation to be an equilibrium, each individual in group B must have no incentive to deviate to location 1, which is physically more attractive than location 2 since more people gather there and a higher payoff is obtained there than at location 2. This is made possible if group *A* people discriminate against group *B* people. Technically, this can be done if group *A* people, upon seeing a group *B* person suddenly take unfriendly action. This way, segregation is maintained through discrimination.

Kaneko and Matsui continued with the development of the inductive game theory. In this theory, people try to 'explain' their experiences by constructing a model. Suppose, for this purpose, that people do not know the actual structure of the game, or in particular, how their payoffs are determined. Suppose further that they play the game according to the segregation equilibrium described above.

In this equilibrium, people who wish to 'explain' the discriminatory behaviour may come up with the following story. For some reason, group *A* people are happy in general, but they become unhappy from time to time. When one closely monitors what happens when their payoff drops, one may realize that a decrease in payoff is observed whenever there is a group *B* person in location 1. Thus, this group *A* observer may conclude that the group *A* people become unhappy when a group *B* person joins them. This is a false model since the objective game says that what matters is the number of friendly people. However, this prejudicial model may well explain one's experiences. Prejudices emerge.

As the following quote exemplifies, researchers in disability studies may say they know all this:

> There was the growing realization that the world we perceive is to a considerable extent shaped for us by the *way* we perceive it – that our consciousness of the world is a human construction rather than a merely mechanical reflection of external reality. Furthermore, this human construction of the world as perceived is different in different historical periods and different social groups, and ultimately is a systematic explanation of the way in which our perceptions are affected by the historical period and social position in which we are located. (Manning 1985, p. 23)

Still, it is important to formally show that such prejudices are one of the outcomes of society, especially if one tries to fit this type of seemingly mental representation into the framework of a market economy.

CRITIQUE OF THE SOCIAL MODEL OF DISABILITY

The international disability movement has shifted its focus from 'good will' to civil rights. If disabled people had not been regarded as 'individuals' or been seen as second-class citizens, it would have been understandable that the disability movement should primarily focus on civil rights. The members of the international disability movement frequently claim to be fighting for the freedom and the self-determination of disabled people. But is the same statement applicable to people with intellectual impairments or with mental health difficulties? For free and self-determined actions in daily life, such people do need the support of peer counseling and personal assistance (see also the argument for self advocacy by Goodley, 2005). But such support is not easily available in many societies, especially when those with intellectual disabilities are usually segregated and isolated from the society. In this sense, civil rights for intellectually disabled people are meaningless without such support. Hence, we should be cautious about being idealistic when thinking about civil rights for such populations since this is not only a legal problem but also a socio-economic one (see Grech, 2009, for a critique of the right based approach and cultural dependency of the social model).

The social model of disability states that disability arises not from physical, mental and intellectual impairment but from a society excluding disabled persons and not providing them with reasonable accommodation. But this view may raise issues related to the dichotomy between the individual and society. A society causes disability, and as such, is to be blamed for such disabling barriers with the implication that society bears the responsibility to mitigate it. To many economists, this assertion based on a supposed dichotomy between the society and the individual seems to be unsustainable.

From the perspective of the social model of disability, a disabled person is *de facto* excluded from a society and as such, society is guilty of causing a disability given the fact that the person suffers from a disadvantage. But, even though that person is social, he/she does belong to the society. None of us can live without belonging to a society. Even if one thinks of himself/herself as being alone, he/she is surrounded by many social services and social networks and since he/she has or once had parents, so he/she is/was connected with some or other family. He/she may go to a supermarket or depending on necessity, even looking for food in public spaces such as parks. But even for this, it must be assumed that some production and distribution system does exist in the society. No one is a Robinson Crusoe on a desert island. Thus, the above person can have some form of influence on society as a whole. If so, that person is also guilty of the emergence of disabling barriers because he/she is also a member of the society that causes the disability in the first place. Remember the argument earlier that even random behaviors of zero intelligent traders affect the market outcome as a whole. But the social model of disability *de jure* excludes a disabled person from its definition of society. But why should such exclusion not be faulted with? This is a fundamental flaw in the social model of disability, resulting from the dichotomy between the society and individual. In economics, it is based on methodological individualism that a society can be regarded as though it consists of individuals, where each individual's decision making may affect society as a whole. We believe that it is necessary to overcome such a dichotomy in disability studies for building truly inclusive communities using economics and game theory.

Another criticism against the social model of disability relates to its ambiguity with regard to the definition of the society. Let us again consider a person who is in a wheelchair and cannot travel on a train. Who or what is responsible for this disability or exclusion? And to whom can we appeal in the sphere of law for remedying such disability caused by society? Of course, the rail company's officer, the rail company and the governing authority of railway services can be held responsible. But no one can take legal action against society. Then, whom does the social model of disability mention as a society?

Of course, if we live in a society that Hobbs described as a natural state, civil rights will not be available. That is, we would need to protect ourselves, and constantly fight and negotiate for everything. This would be a very difficult society to live in. So we will mutually agree to establish laws and institutions through a social contract for reducing the transaction cost and complexity of social transactions. In this sense, the civil rights approach should not be discarded. In fact, life conditions for disabled people have been improved since the influence of disability movement has been boosted. We have to admit it, however, that we still think that the civil rights approach is independent of the dichotomy between the society and individual. So we have to search for a new approach which is not based on such a dichotomy, an approach that can be accommodated through economics and game theory.

CONCLUSION

This chapter studied inclusive communities by applying economics and game theory to disability studies. First, we gave a brief overview of the basics of economics and game theory. According to Kreps (1990), the four categories of economics are the individual actors, the behaviors of the actors, an institutional framework, and the mode of analysis for modeling how the various actors' behaviors will aggregate within the given framework. We introduced some key related concepts in game theory – strategic complementarity and network externality. We also addressed the misguided criticisms against economics such as market fundamentalism and the supremacy of the rational agent in economic analyses by showing that the connection between market efficiency and the assumption of the rational decision maker is weaker than what is assumed in the textbooks.

We recognize that any human being is not perfectly rational; rather, human beings are influenced by their surrounding socio-cultural environments and develop some boundedly rational behavior or blindly follow established conventions to resolve the many problems they face.

We also explain a recent game theoretic attempt in which, first, discrimination emerges as an equilibrium even if there is no inherent factor, and then, if one tries to understand such an equilibrium based on one's limited experiences, prejudices may emerge. Thus, the endogenous emergence of stigma is explained.

Finally, we point out that the capability approach is a promising economic tool for improving the efficacy of the social model of disability, since it can provide information about the existence of discrimination resulting from a disabling society lacking appropriate accommodation. We also show that the dichotomy between the society and individual that is implicitly assumed in the social model of disability is problematic, because this view cannot capture the indirect effects of social interactions. Thus, it seems to be necessary to overcome the dichotomy between the society and the individual in order to create inclusive communities via a clever designing of the market and social institutions using economics and game theory.

In this chapter, which is our first attempt to make a contribution from economics to disability studies, we were unable to entirely cover many socio-economic problems vital and relevant to disabled people. Among the many important problems, designing income maintenance programs is a vital issue for improving the life conditions of disabled people. Universal basic income guarantee (UBIG) is a recently discussed political agenda. UBIG is an income maintenance program which guarantees a constant income for each individual regardless of age, gender, geography or other variable. Kawagoe (2009) investigates the problems that may arise in UBIG schemes. By comparing it with negative income tax (NIT) , which is a progressive income tax system where people earning below a certain amount receive supplemental pay from the government instead of paying taxes to the government, in the laboratory experiment, he found that UBIG may reduce more labor incentive than the NIT in a setting where NIT and UBIG are identical. This is in clear contrast with the opinion of the UBIG advocates. Still, that result is far from conclusive at this stage, and it is apparent that we have to consider UBIG more critically from an economics point of view.

We hope that a dialogue between economics and disability studies can lead us forward even though one can think that we are till now still in the wilderness. As a first step towards that goal, we should be aware of the indirect effects of social interactions such as network externality and institutional complementarity, which we used in this chapter when we consider socio-economic problems pertaining to disabled people. For this, taking methodological individualism as a foundation for our standpoint is important. We also hope that through this dialogue, our study, albeit far from completion, can suggest a way to improve the welfare of disabled people and to help build more inclusive communities.

NOTES

[i] The classic works on fundamental theorem of welfare economics include Debreu (1959) and Arrow and Hahn (1971).

[ii] Fudenberg and Tirole (1991), Gibbons (1992) and Osborne and Rubinstein (1995) are the standard textbooks on game theory.

[iii] In economics, an externality of a transaction is the effect on a third party that is not directly involved in the transaction.

[iv] See Davis and Holt (1993) and Miller (2002).

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CHAPTER 9

FEMALE ASYLUM SEEKERS LIVING IN MALTA

Approaches to fostering 'inclusive communities'

This chapter seeks to problematize notions of community and position this debate within the odyssey of female migration, more specifically, Sub-Saharan African asylum seekers in Malta. I begin my argument by confronting the assumed homogeneity of any community, and I hope to demonstrate how, contrary to political and public discourse so very prevalent in Malta which tends to generalize and essentialize, the Sub-Saharan African asylum seeker population also exhibits diversity, hierarchal structures and exclusion. This, I will argue, is particularly salient in the case of female asylum seekers, whose experience in Malta is often one experienced at the margins, a gendered and racialized experience, frequently marked by poverty, violence, and political disempowerment. A consideration of such matters requires the need to explore understandings of 'community', their scope and place in an increasingly globalized and yet localized world, and to reconsider concepts of inclusion. I will argue that despite the influence and importance of transnational communities and varied influences from overseas – be they financial, relational, political or others – physical place, or location, must remain important, as the tangible proximity wherein female asylum seekers in Malta live out their day to day lives. It is within this space, that alliances and solidarities may be forged between communities made up of composite representations of identification and belonging. The issue of inclusion however, cannot be separated from issues of access to power, rights and material wellbeing. In conclusion, a pedagogical response is considered as a means of transcending gendered and racialized structures and forging alliances based on common interests within transient communities.

It could be argued that the consumer driven, dog-eat-dog society, often experienced as the capitalist mode of production, has banished traditional understandings of community to the history books. Such notions of community, generally assumed as being within a fixed locality, conjure images of camaraderie, grounded in equality and a sense of shared beliefs, practices and goals. In practice, 'community' never quite lives up to its expectations of warmth and 'togetherness' and must be treated with a healthy dose of scepticism as it negates the hierarchal

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and diverse nature of any social grouping. Such an understanding of community imparts an insular understanding that is grounded, not in inclusion, but in exclusion. Moreover, within an increasingly 'globalized world' and the intensification of 'transnationalism', there are those who argue that 'locality' can no longer be conceptualized as a specified social reality within a bounded space. Gupta and Ferguson for example contend that the 'transnational public sphere has rendered any strictly bounded sense of community or locality obsolete' (Gupta & Ferguson, 1992, p. 9). In a similar vein, the 'transnational' debate has propelled the post-structuralist critique on essentialist notions of ethnicity and identity, arguing that the modern state encapsulates multiple belongings, cultures and identities, rather than a homogenous mass. There are those, however, who would argue that any celebration of the hybrid and diasporic would be premature, highlighting the need to remain attentive to how material realities are experienced and negatively impacted by global capitalism (see for example Young, 1991). Perhaps it is the migrant who epitomizes the transnational subject, often described as the 'liminal' person, the migrant is often conceptualized as neither 'here' nor 'there', floating in some kind of spatial limbo. But of course, the migrant is 'somewhere', and in this case, as I write from the small island of my own country Malta, the migrant is 'here'.

CONCEPTUALIZING COMMUNITY

The concept of community is a value-laden term that has generated a multitude of definitions and understandings and ongoing debate. Tonnies (1957) first used the words *gemeinschaft* and *gesellschaft* to differentiate between the two ways people relate to each other. The gemeinschaft 'community' was understood as a socially cohesive entity, characteristic of families and neighborhoods with a shared common identity and sense of mutuality. Gesellschaft was defined as a community wherein people relate to each other as a means to an end, participation in the group is motivated by self interest, and hence the sense of common concern and support is absent.

Conventional notions of community, reflecting perhaps Tonnies' 'gemeinschaft' and prevalent in public discourse, are as a matter of course, couched in the conception of a physical locality or national territory, wherein the day-to-day, face-to-face exchanges and practices between members of the community are played out. Such understandings are taken as given; images of 'togetherness', grounded in equality and a sense of shared beliefs, practices and goals that belies the hierarchal nature of any social groups, are (as mentioned earlier), rarely questioned. Such nostalgic images of community are often related to the fading past, a world of traditions, values and solidarity (Peleikis, 2001). Indeed, the intensification of globalization, accompanied by the wide diffusion of the neoliberal agenda is often perceived as a threat to the everyday way we live out our lives. Consequently, an imagined spatially bounded community steeped in a common history, rituals and metanarrative, that can often invoke the tendency to look at the past though rose tinted glasses, to remember a world of tradition, close knitted neighborhoods, and homogeneity, often persists. Such images are often conjured by far right groups, where socially constructed notions of nationalism are used to paint a wistful picture, a perfect memory of ‘how we once were and how we should remain’. Used in such a vein, calls for community can be used in an exclusionary manner: ‘there are those who belong, and there are those who do not. Ironically, it is these same political parties that espouse the neoliberal agenda, wherein social and economic survival is the responsibility of the individual and it is here that it is possible to reflect on Tonnies’ understanding of ‘gesellschaft’. Certainly, the very particular characteristics of the neoliberal agenda would seem to run contrary to any common understanding of ‘community’ or ‘inclusion’, when its policies often lead to increased inequality, poverty, the marginalization of particularly vulnerable groups, and digging an ever deeper chasm between the ‘haves’ and the ‘have nots’ (Grech, 2009).

My concerns here then are two-fold: on the one hand to recognize the romanticized images of the past and to acknowledge the power issues and exclusionary mechanisms at play (be they grounded in gender, social class, ethnicity or any other social grouping) within any given community. And secondly to question how a conceptualization of ‘inclusive communities’ can fit in with the policies and measures espoused by the neoliberal agenda and within an increasingly globalized world.

THE LOCAL AND THE GLOBAL: COMMUNITY WITHIN A TRANSNATIONAL WORLD?

Evoking nationalist sentiments based on some pure ‘natural’ identity or culture grounded in a particular locality, belies the transformative nature of any given society in the post-industrialized world. The intensification of human mobility (Castles & Miller, 2003) and the evolution of global technologies has brought about new, and reinforced pre-existing social patterns, that span national borders (Vertovec, 1999). Under such circumstances, now more than ever, the economic imperative to facilitate the movement of capital, goods and information, implies that no nation state, or locality, is immune to influence from the ‘outside’.

Homogenized notions of community then inevitably mask the heterogeneity within: difference and diversity that is often demarcated along racial, gender and class lines. In addition, it is hard to imagine how any nation state could ever have been immune to influence from beyond its borders, and with the burgeoning networks that now span the globe in the form of the ‘transnational’ (see Vertovec, 1999), social, cultural, economic and political relationships will continue to transform, creating new forms of solidarity and identity. Under such circumstances, there are those who have challenged notions of community as a bounded space (Gupta & Ferguson, 1992), and others still who have argued that economic policies associated with globalization and technological developments have reinforced the importance of cross-border dynamics to the detriment of nation states and their borders (Sassen, 2006). However, before we get lost in the post modern carnival celebrating transnationalism, research has indicated how the economic imperative to facilitate the movement of capital, information and goods contradicts the increasingly restrictive measures of many nation states to prevent human mobility across their borders (Castles & Miller, 2003). Whilst at a global level the power of the nation-state continues to decline, the national government continues to regulate the political, social and economic relations within its bounded territory. It is within this regard that one can reflect on the way the Government of Malta has implemented policies in relation to immigration and asylum, particularly in the case of those asylum seekers arriving from the coast of Libya.

It is in very recent times that Malta began to make the shift from a country of emigration to a country of immigration which has inevitably led to an increase in cultural and ethnic diversity on the island. The arrival of Sub Saharan African migrants on the shores of Malta poses a new challenge for the Government of Malta, and the Maltese. Aside from the limitations of the island, based on size and population,[i] the arrival of what has colloquially become known as *klandestini* (clandestines) has been perceived as a threat to the Maltese and to the myth of cultural homogeneity, resulting in widespread xenophobia and racism (see for example, ENAR, 2009). This relatively new phenomenon has led to the mobilization of communal symbols (not least the ‘‘nation’s religion’ or ‘Christian values’) and collective memories that subsume the heterogeneity and social hierarchy into some kind of larger collective, albeit imagined, national identity.

The resulting scenario is one of ‘us’ and ‘them’, those who ‘belong’ and those who do not. Whilst many of the asylum seekers have, or will leave Malta, some will remain on the island, and, as highlighted by Castles and Miller (2003), failure to provide effective means of integration will lead to ‘exclusive communities’ marked by poverty, subjugation and conflict that will be detrimental, not only to the migrant community, but also to the host community.

THE STRANGER WITHIN

The arrival of asylum seekers on the shores of Malta has initiated particular procedures that are specific to this mode of entry – hence this particular group of migrants – into Malta. Whilst the majority of these migrants arrive in Malta without the necessary documentation and authorisation, they are not considered to have committed a criminal offence. However, in the interest of ‘national security and public order’ (MFSS & MJHA, 2005, p. 11) they are kept in detention, up to a period of twelve months,[ii] until their claim for asylum has been examined and verified. In his theoretical elaborations on discourse, Foucault (1977) demonstrates how a social and political context affects language and that language shapes and constructs realities. Whilst the detention policy, and indeed subsequent policies related to life in Malta after the detention period have received considerable criticism[iii] and are viewed as contributing to the marginalization of the asylum seeker population in Malta (MSF, 2009), the policy receives substantial support from the main political parties and the majority of the Maltese people. The detention policy and political discourse has established a link between asylum seekers and some kind of perceived threat to the Maltese territory, and as a consequence to the Maltese people. Ultimately such beliefs, to a certain degree, determine the lived realities of asylum seekers arriving in Malta, and as I will demonstrate later on, most particularly, female asylum seekers.

Exclusionary mechanisms often grounded in xenophobic, racist and Islamophobic discourse serves to maintain or push asylum seekers to the margins of society, both physically and metaphorically. Upon release from detention the vast majority of asylum seekers are housed in large open centres (up to 800 people at a time) in relatively remote parts of the island. This situation has had negative ramifications for the extent to which asylum seekers are able to influence those factors that may have a direct bearing on the quality of their lives, for example access to and quality of service provision (including health and education for themselves and their families), access to the labour market, and the extent to which they can influence policy development, amongst others. As I hope to demonstrate, issues of power are central here.

Within any host society, neither asylum seekers, nor those enjoying some form of temporary or refugee protection, or of course rejected asylum seekers, are citizens of the Nation State. Whilst some enjoy more privileges and rights than others amongst this migrant population (for example the right to work and the right to health care), these rights are significantly cut short in comparison to the citizens of the host country. This final point is inherently linked to immigration policies, legal status and access to long term residence and citizenship (Joppke, 2006).

As Ogelman et al. (2006) remind us, the political power and influence asylum seekers possess in the national policy making of the host country, is particularly limited as a result of two crucial factors. The first is access to political power, governed by the national policy making in the host country, and the second is related to the migrants' group cohesion based on organizational and material capabilities. I will expand on each of these issues in turn.

Citizenship formally assigns the equality of rights of all citizens within a political community. Castles and Miller (2003), convey the importance of defining who belongs to the 'people' since modern nation-states (and this would include Malta) are formally defined by the constitution and laws, according to which all power derives from the people. Membership in the 'nation' is denoted by the status of citizenship, which conveys rights and duties. Asylum seekers are excluded from many of these rights, which in turn limits access to society's key institutions (amongst them health, education, employment, housing and welfare) and which consequently impedes integration and inclusion. Thus, issues of legal status, long term residence permits, and ultimately access to citizenship, determine the extent to which asylum seekers can participate and integrate within the host society. A look at Malta's performance in the Migrant Integration Policy Index (MIPEX) (2007) provides a clear picture of the situation for migrants in Malta. Whilst Malta scores well in granting migrants political liberties, and scores favourably well in eligibility for and rights associated with long term residence, electoral rights are seriously limited, further negatively affected by the absence of any official consultative bodies with migrant associations. Implementation policies are also critically weak, since migrant associations cannot access specific public funding at any level of governance. Access to nationality ranks 24th out of the 28 MIPEX countries and Malta scores 27th on both labour market access and anti-discrimination. Political participation is the lowest-scoring strand for Malta, as for several other European countries. (Niessen et al., 2007, p. 123).

Such exclusion from citizenship rights impedes subsequent integration within the Maltese community. Joppke (2006) provides a strong argument in demonstrating how asylum seekers simply do not have the political clout to bring about the changes necessary to improve their conditions, and as the following passage highlights, the possibilities for asylum seekers living in Malta do not look encouraging:

> Malta is one of just four countries where only a minority thinks that ethnic diversity enriches the national culture (31.7%). The Maltese are consistently the least supportive of migrant's rights in the EU-27, whether polled about equal social rights, family reunion rights or facilitated naturalization. And the Maltese are the most supportive in the EU-25 of deporting all legally-established third-country nationals (35%), especially if they are unemployed (63.6%). Over two-thirds of Maltese believe ethnic discrimination is fairly widespread and the majority think it increased from 2001-2006. The population is divided over whether the country should do more to combat discrimination. (Niessen et al., 2007, p. 127)

Indeed, politicians who work on behalf of migrants are often punished at the ballot box. The 2009 European Parliament elections would seem to exemplify this. Following a disappointing showing in the Maltese EP elections and his consequent resignation, the Chairperson of the party Alternattiva Demokratika, Professor Arnold Cassola remained defiant, quoted as saying ‘that pandering to the electorate on issues such as immigration and the integration of asylum seekers is not right, neither morally nor politically’ (Malta Today, 2009).

Exclusionary policies such as those described above, combined with the further marginalizing aspects of racist and xenophobic sentiments espoused by the host society, affect all asylum seekers negatively; however the effect is particularly pronounced for female asylum seekers and serves to reinforce gender inequalities. The arrival of the asylum seekers in Malta has been observed as a monolithic invasion that negates the heterogeneity of this population. Indeed, the asylum seeker population living in Malta is diverse, and, as in all societies, inequalities grounded in ethnicity and culture, religion, political status, and gender, amongst others, exist. It is the latter which I will now be addressing.

Women migrate too ...

The majority of the arrivals of Sub-Saharan African asylum seekers to Malta are made up of young men, aged between 20-30 years of age. Whilst the percentage of women varies from one nationality to another, the total average since 2002 is around 13%,[iv] and they remain largely invisible both in political and societal discourse. Indeed, when the topic of female asylum seekers does emerge, discussion seems to focus exclusively around the themes of ‘hijab’, prostitution, HIV and childbirth, presenting a skewed image of African women as victims, passive and burdensome. This is not a phenomena particular to Malta alone. Edward Said's seminal work Orientalism (1978) exposed the hegemonic imperialist discourse that constructed stereotypes of the oriental other as somewhat primitive and degenerate. His work also served as an impetus for subsequent work on women and gender and feminist writings (see for example Spivak, 1985; El Saadawi, 1997).

Migration literature traditionally constructed women as passive appendages to men in the migration process, ignoring the intricacies of women's motives and their active role in the decision making process and increasingly autonomous migration (Carling, 2005). Recent trends in migration data, reflect what has been coined the 'feminization of migration' (op. cit., 2005), witnessed as an increase in women migrating, either autonomously or with their families.

This trend has coincided with the increased understanding of the migrant as a gendered subject, immersed in a spectrum of social and gendered relations that remain pivotal throughout the migratory process. Despite the numerous challenges many female migrants have to endure, particularly in forced migration, the experience is often steeped in patriarchy, where women have nominal decision making power (Kofman et al., 2000).

Gender inequality and powerlessness are compounded by the extreme conditions often associated with forced migration: lack of security, lack of access to vital services (including health care), overcrowding, food shortages, and poor sanitation are just some of the factors that impact on women's ability to function within their social gender norms. Under such conditions, community support, social rules and regulations can become fragile, and the difference in power relations between men and women is often manifested through gender based violence and rape (Williamson, 2004).

As Morris (2005, p. 12) states, "many of the underlying power structures that operate within displaced communities work directly against the practical and strategic needs of refugee women". Arrival in a relatively safe country, such as Malta, is generally associated with greater stability, a decline in mortality rates and increased satisfaction of basic needs. However, this does not mark the end of insecurity, for example, factors such as life in a detention centre, restrictions on the right to work, dependency on in-kind benefits and the stigma often related to asylum seekers can have long lasting and demoralizing effects on asylum seekers, in particular women, often forcing them into the margins of society. Gender hierarchies, combined with institutional racism, and factors such as resident status, linguistic abilities and education levels can further impede female asylum seekers, influencing job opportunities, wages and work environments.

Indeed, integration is not just dependent on the host society, but also on the behavior and beliefs of the asylum seeker community. A substantial body of work in migration literature is concerned with how social networks can support new migrants to adapt and eventually integrate into the host society (see for example Portes, 1998). The situation vis-à-vis Malta is very particular here. First of all, since the arrival of Sub-Saharan Africans is a relatively new phenomenon, political, social and policy impediments aside, African communities simply have not yet had the time to settle and integrate (although embryonic forms of chain migration do seem to be developing) and are hence limited in the degree of social capital they can tap into within the community to access employment or housing, for example. Such a situation can have negative ramifications for women – particularly those travelling alone (Azzopardi & Pisani, 2009), on the one hand for accessing vital material resources, and also for tapping into familiar networks that can facilitate the efficiency of a given community through coordinated action for mutual benefit (Putnam, 1993). However, as I shall be discussing shortly, community membership can also have stifling effects, particularly in the case of women, notably in suffocating and preventing integration within the wider community.

In addition, Malta is considered a country of transit, since in the main, it was not the intended final destination for the vast majority of those who arrived.[v] Many of the asylum seekers also recognize Malta's limitations with respect to size and population density, and as such are eager to leave the island to reach mainland Europe,[vi] or perhaps to be resettled in a third country. Such a transitory or 'temporary' mindset will undoubtedly hinder integration prospects, even if asylum seekers end up remaining in Malta as no alternative destination is available to them.

The migration process, from leaving the country of origin, through transit (which can often take months or even years) to arrival in the host society brings about shifts in many aspects of women's lives. These changes may, for example, be relational: with family and friends, both back in the country of origin and in the host country, and within the asylum seekers' communities or wider communities in the host country. Adjustments may also have to be made within the cultural and religious contexts, while economic standing may also undergo transformation, be it for the better, or for the worst. The extent to which migration can serve as an emancipatory experience rests on a number of factors. For every woman, such transitions will be determined, to a certain degree, by the conditions under which she leaves the country of origin, her status not only in legal terms, but also in social terms, and how such status translates into rights. One can also see, for example, how the migration from a 'traditional' and close knit society, to an urban 'modern' setting, may be a liberating experience as with the creation of distance women may feel less social pressure to conform to gender norms. However, as the next section highlights, this is not always the case.

So far and yet so near …

The ability to define 'here' and 'there', has become increasingly blurred as globalization and population mobility has brought about the intensification of overlapping social networks that span the globe (Gupta & Ferguson, 1992). As cultural traditions mobilize and are relocated beyond local and national boundaries, crucial questions regarding the interrelations of 'social space', 'place' and 'identity' must be posed. Appardurai (1995) highlights how, as a result of global technological communications, the local 'grapevine' takes on global dimensions, circumventing local and national boundaries that can impact the construction of localities, and impact lifestyles and behaviour from a distance.

Such a reality may have significant impact on the lives of female asylum seekers living in Malta. Space limitations restrict the extent to which we can delve into the economic and political environment in Sub Saharan Africa, as well as the gendered and cultural factors, and the contextual issues that impact the lives of women within this heterogeneous region. Despite its rich and diversified resources, sub-Saharan Africa remains the world's poorest region, with the majority of the countries ranking low in terms of human development indicators (Adepoju, 2008). Alleviation of such poverty has proven to be a challenging task, and single-cause theories fall well short of explaining the multifaceted and contextualized reality, deeply rooted in the social fabric and allocation of economic and political power. This is most pronounced in the case of women, whose poverty is impacted by multiple layers of discrimination and social control, most of which is related to broader deprivation experienced by most people trapped within it (Grech, 2009). These include, but are not limited to:

- restrictions in access to private and public goods – education, health, infrastructure and so on and hence low human capabilities and 'functionings' (see for example Sen, 1999)
- asset poverty, encompassing not only material assets such as land and property, but less tangible assets such as social capital
- subjective dimensions of poverty such as low self-esteem, dignity, choice, and power
- 'social exclusion' related to the poors' marginalisation from mainstream society, triggered by lack of political participation, social dialogue, and 'voice' (Chant, 2006, p. 208).

The question here is, to what extent do these subjugating forces impact female migrants, living in new and often very different contexts? Let me use one example. While there are no statistics available in Malta, it is generally understood that the level of illiteracy among female asylum seekers residing in Malta is higher than that of the men, implying that women are more likely to lack the leverage, including language skills, necessary to gain access to the labour market and basic public goods – such as education, adequate housing and health care (Azzopardi & Pisani, 2009). Women are often also further 'burdened' with the responsibilities of childcare, which, without the appropriate support can often lead to further isolation and poverty. To a certain degree, men are able to provide for the needs of the labour market (for example in construction), however, women tend to be left on the sidelines, which further reinforces their financial dependency on men. This, buttressed by xenophobic and racist sentiments that further hinder access to employment often leads to a vicious cycle of poverty, ill health and social isolation.[vii] Peleikis (2001) demonstrates how continued contact and communication with the country of origin can serve to sustain gender hierarchies and inequalities. Whilst the place of origin remains important, for example as an economic, social and psychological resource, sources of oppression are able to unleash their power, control and dominance within the translocal realm (Peleikis,

2001) that often serves to maintain women in a subjugated role, and limits the often emancipatory nature associated with migration.

The situation in Malta is very particular and requires further investigation. The relative isolation of open centres, often housing many hundreds of asylum seekers in crowded conditions, provides for high community surveillance. Whilst such settings may provide a sanctuary in the face of racism and xenophobia, and create a sense of 'community' based on shared experiences and a source of identity, under such circumstances, the extent to which a woman may feel the 'space' to explore new identities is considerably restricted. This perhaps, is reinforced by the limitation of physical space in Malta, as a result of its small size, and echoes the 'small island nature' of Malta described by O'Reilly Mizzi (1981) that served (and perhaps still serves) to maintain Maltese women in a subjugated role. A case in point would be the (albeit small number of) Somali women I have accompanied to the airport for resettlement to the United States (US) who have chosen to abandon the 'hijab' and to dress up in jeans upon departure (it would be pertinent to add here that in each case the woman was travelling without a husband). When asked why, these women often highlighted how they felt that the US would provide the space and freedom to dress as they wished, unlike in Malta wherein 'everyone knows everyone', and they lived under the close watchful eye of the 'community'. Of course, the above may well be an oversimplification of the various dynamics at play, but does, nevertheless, point to some very interesting issues requiring much needed investigation.

The conditions described in this brief overview present a challenge to one's identity and sense of belonging, as women attempt to negotiate and renegotiate who they are and where they belong within this ever changing environment, a context that is increasingly transnational and de-territorialized. Thus, the migration process may be seen as a physical movement, from one location to another, and also, as it were, a migration of the mind. Under such circumstances, women may engage in multiple identities in order to negotiate a plethora of values and meanings as they surface in often erratic, changeable and disparate settings (see Glick Schiller, Basch and Blanc-Szanton 1992). However, such fluidity and flexibility may not always be possible, since, as has been demonstrated, women often experience constraints in how they choose to present themselves and negotiate these shifting cultural and gendered identities with respect to their own notion of community, and how they decide to live out their lives, for example with regards to education, employment and the upbringing of their children.

Focusing on the gendered aspects of migration draws attention to the numerous constraints women experience. The behavior of communities back home, combined with the behavior of the migrant community, impacts the extent to which women are able to interact with the host community and processes of integration. The result can be one of double exclusion: denied the right to take an active role in decisions that may impact her own life, and that of her family and wider migrant community; and excluded from the right to participate in the wider host community, be it as a result of racism and xenophobia, lack of access to rights, and insecure legal status. The end result may be an ongoing cycle of isolation and marginalization. Notions of inclusion take on a multifaceted and dynamic element. The above demonstrates how 'inclusion' goes beyond structural factors, such as access to housing and health care, to take on subjective dimensions such as culture, social activities and so on. For example, a number of female asylum seekers living in Malta have managed to find housing and hold down regular employment. At first glance, they would seem to be integrating well into Maltese society. A closer investigation however suggests otherwise, since beyond work relations, these women often have no contact, and no friendships with the wider community, especially the Maltese (Azzopardi & Pisani, 2009). Such experiences bring to the fore the importance of locality, and negates the tendency to "over generalize the global current of so-called nomadic, fragmented and deterritorialized subjectivity" (Squires, 1994, p. v).

RETHINKING COMMUNITIES

I began this chapter by problematising traditional notions of community, and highlighting the homogenizing, stifling and often exclusionary elements associated with this concept. However, despite such justified critique, abandoning this concept would run the risk of throwing the baby out with the bath water. Diverging from the neoliberal agenda and its focus on individuality, communities can be a source of support, a means of transmitting vital information and of providing resources, refuge, sanctuary and social solidarity. A reconceptualization of community then, would need to consider notions of belonging and identity, or identities, to fit in to the postmodern reality we experience today. Despite the increasingly shifting lifestyles, and the influence of transnational communities, people do need to be grounded within the space that they live out their day to day lives at a particular time. No transnational community, virtual or otherwise, can replace the human contact necessary for immediate support and inclusion that most people need in order to survive, both physically and emotionally. Nobody is ever 'nowhere'. However, female asylum seekers understand, narrate and engage with 'their place' in different ways, depending on the specific time, place and historical situation as well as on their age, social class, social and economic environment and the way gender is negotiated. Within this complex and multifaceted location, then there is fluidity. In line with the work of Giroux (1996) it can be argued that it is within this space that communities, in the plural, and made up of composite representations of identification and belonging, can interact to form alliances and connect.

INCLUSIVE COMMUNITIES: A PEDAGOGICAL RESPONSE

The arrival of sub-Saharan African asylum seekers in Malta, fuelled by images of 'black' men in handcuffs, a lengthy detention policy that criminalizes the population, and public and political discourse drenched in words such as 'invasion', has fuelled racism and xenophobia in Malta. As highlighted by Borg and Mayo (2006, p. 158), the 'gradual development of Maltese society into a multiethnic and multiracial one is marked by tensions'. A failure to address these challenges will result in the marginalization of a sizeable population in Malta and the creation of excluded communities. The presence of ghettos, poverty and isolated groups in Malta will be detrimental to all those who inhabit the island. The challenge then, is how such tensions are to be confronted and negotiated in a manner that fosters inclusive communities. There is of course no quick fix and no single solution. I will pick up on a couple of strategies that can be developed at a 'national' level, and will conclude by proposing a targeted strategy that focuses specifically on female asylum seekers.

Giroux (1996) draws attention to how national identity, and nationalism, 'is a social construction that is built upon a series of inclusions and exclusions regarding history, citizenship, and national belonging' (p. 190). He goes on to argue that if, as Benedict Anderson (1991, cited in Giroux) suggests, nations are political communities distinguished by 'the style in which they are imagined', then a pedagogical response is required, one that:

> … redefines national identity not through a primordial notion of ethnicity or a monolithic conception of culture, but as part of a postmodern politics of cultural difference in which identities are constantly being negotiated and reinvented within complex and contradictory notions of national belonging. (Giroux, 1996, pp. 200-201)

Adopting Giroux's inquiry, the question here becomes: what forms of address, images, texts, and performances are being produced and used in popular discourses to construct what it means to be Maltese? Can the 'Maltese national identity' take on an inclusive form that embraces different religious, ethnic, racial and sexual identities? In crude and simplistic terms, can a Maltese woman be considered as anything other than white, Roman Catholic, heterosexual and (potentially) a wife/mother and homemaker?

Mayo (2007, p. 10) calls for an educational strategy that generates 'the consciousness necessary to foster greater solidarity among different subaltern groups'. It is here that different communities, for example the local working class and the asylum seeker community, share common interests since they are most likely to experience the destructive effects of neoliberal globalization policies (op. cit., 2007). The recent publication of a policy document entitled 'Migrant Workers' by the largest trade union in Malta, the General Workers Union (GWU), goes some way to addressing these issues and is a promising start. Rather than adopting the right wing mantra that seems to feed off 'divide and conquer', the paper calls for solidarity, arguing that the Unions' members can only be protected if the working conditions of migrant workers are also protected. Similar alliances can be forged elsewhere, for example amongst mothers and the increasing need for appropriate childcare facilities. The ethos then shifts from one of alterity to one of commonality, of shared needs and shared goals.

Issues of rights come to the fore here. Whilst acts of solidarity and the formulation of alliances may build a stronger lobby, the fact remains that asylum seekers are not citizens of the state and hence do not enjoy the same rights as the 'Maltese'. Whilst the power of the nation state may, to a certain degree, have been diminished, it has not, by any stretch of the imagination been rendered impotent; hence, issues surrounding legal status and access to citizenship ultimately determines the extent to which asylum seekers can participate, contribute to, and be included in any given community. Furthermore, even when certain rights are guaranteed on paper, there is little hope of accessing these rights when material and political power is severely lacking (see for example Grech, 2009). Given the somewhat precarious legal status of female asylum seekers then, combined with gendered, economic and racialized inequalities described above, the ability to mobilize resources and power could be significantly inhibited. Nevertheless, Saskia Sassen (2006, p. 203) draws a clear distinction between 'powerlessness and the condition of being an actor even though lacking power'. Despite the fact that membership in the community may not be subsumed under the national citizenry, this 'presence' indicates the possibility of political engagement in a specific locality allowing for collective organization, alliances and the strengthening of communities.

FOSTERING INCLUSIVE COMMUNITIES: ADDRESSING THE NEEDS OF FEMALE ASYLUM SEEKERS

In societies where women's power to move autonomously is limited, the act of migration itself can be empowering, stimulating change in the women themselves, and in both the sending and receiving countries. Research has shown how access to the labour market and improved access to key public services can provide the leverage necessary for female asylum seekers to gain greater autonomy and control over their own lives and those of their families (Sassen, 2006). Under such circumstances, female asylum seekers can become a force for challenging existing gender imbalances and inequities and for changing underlying conditions so that new imbalances and inequities do not arise. Increased contact with a more diverse population and greater contact with the public sphere provides for new socio-cultural and political locations and the space for female asylum seekers to emerge as actors, to engage in dialogue with the numerous communities they may come into contact with and/or associate themselves with.

Nonformal education, with its emphasis on social mobilization and transformative action (Torres, 1990) can create the space for a pedagogy that is relevant to the needs of female asylum seekers. Such pedagogies are grounded in the idea of an educational encounter of differently positioned people, for the reciprocal hybridised transformation of all those involved (Todd, 1998). Of importance here is the focus on dialogue, and the need for an 'engaged pedagogy' (hooks, 1994, p. 15) that provides for individual engagement, democracy and social freedom (Freire, 2000), the necessary foundations for inclusion within any given community. In the case of Malta, such a strategy that engages with issues of representation and participation, may lead to new conceptualizations of what it means to be Maltese and how communities residing in Malta are understood and constructed.

In this chapter I have tried to demonstrate how the social exclusion experienced by many female asylum seekers is a multifaceted and contextualized reality, deeply rooted in the social fabric of both the sending and receiving country, and the allocation of economic and political power. In conclusion, I would extend an understanding of inclusive communities as one that must not be understood as a harmonized collective negating difference and inequality based on gender, race, social class or any other form of social categorization. Rather, inclusive communities must be understood as including multiple subjectivities, oppressions and hierarchies engaged in a process that is never fixed or static, but that allows for interaction, for alliances to form, multiply and connect, and to disengage and form again. Inclusive communities can also provide a vehicle for change in providing mutual support and confronting structural inequalities, social and material deprivation Far from being suffocating and exclusionary, inclusive communities thus conceptualized, can provide female asylum seekers, and those they choose to associate themselves with, the space for emancipation, equity and collective action.

NOTES

[i] It is when one flies over Malta that one is able to appreciate the Lilliputian nature of the island. Malta has a population of 450,000, and is the smallest and most densely populated country in the EU and one of the most densely populated countries in the world, with around 1,265 inhabitants per square kilometre.

[ii] Those whose request for asylum is rejected are detained for a total of 18 months.

[iii] For Reports on the conditions in Lyster Barracks see Council of Europe, Office for the Commission for Human Rights, Follow-up report on Malta – 2003-2005, Strasbourg, March 29, 2005; Council of Europe, Committee for the Prevention of Torture, Report on visit to Malta carried out from 18-22 January 2004, Strasbourg, August 25, 2005; European Parliament Committee on Civil Liberties, Report by the LIBE Committee Delegation on its visit to the administrative detention centres in Malta, Brussels, March 30, 2006.

[iv] Figures provided by MJHA, 2009.

[v] Dublin convention.

[vi] Other reasons for wanting to leave Malta include first and foremost the possibility of family reunification, to join families settled elsewhere, the possibility of long term stability and in some cases the eventual opportunity to acquire citizenship in a third country.

[vii] The situation in Malta is massively under researched, indeed any further discussion at this point would be conjecture. More work needs to be done, for example on understanding gender disparities within the asylum seeker population and its impact on employment, and how the wearing of the hijab amongst Muslim women may affect job prospects, amongst others.

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JAMES M. MANDIBERG AND RICHARD WARNER

CHAPTER 10

THE VALUE OF MUTUAL SUPPORT THROUGH CLIENT COMMUNITY IN THE DESIGN OF PSYCHIATRIC TREATMENT AND REHABILITATION PROGRAMS

Although it is often unrecognized, our choices in the design of psychiatric treatment and rehabilitation programs are value based. We may have no difficulty acknowledging some values as evident – a preference for community over institutional settings, for example, or the importance of work in recovery from mental illness, but other values may be less apparent. One such embedded value is the conflict between reliance on professional knowledge versus the capacity of people who have experienced severe mental illness and psychiatric disability themselves to play a major role in their recovery. A reliance on professional competence will foster a paternalistic approach by the treatment provider and a preference for professional-run programs, whereas a perception of significant capacity among mental health service users will turn the focus on user empowerment, peer support and user-run programs (Charlton, 1998; Illich, 1977). A similar embedded value that may go unrecognized is the conflict between what is called "mainstreaming", on one hand, and the importance of client community as valuable resource in treatment and rehabilitation, on the other (Mandiberg, 1999, 2010). Mainstreaming is the notion that the long-term interests of people regarded as "other", e.g., people with disabilities or people from racial, ethnic and sexual identity minorities, are best served through receiving supports, services and education in the same settings as those in the majority. Although community is often conceptualized geographically, it is also used to describe those with shared identity, experiences, culture and interests. Examples include the deaf community (Padden, 1996; Van Cleve, Vickrey, & Crouch, 1989) and the LGBTQ community (Ford, 1996; Gluckman & Reed, 1997).

Mainstreaming and the related concept of "normalization" share the unexplored belief that the pathway to community life for all is through residential, social, and work placement exclusively in the broader community. This leads mental health programs to disperse people in normal housing scattered throughout the broad community, to place people through supported employment in normal jobs where

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they may be the only person with a history of severe mental illness and psychiatric disability , and to encourage socialization in normal community opportunities. Services designed to promote mutual support in housing, work and socialization are discouraged as not leading to normalization. But what is normal for those who are considered by the majority to be “other?” Do all individuals from minority groups scatter themselves residentially, work in jobs in the majority community, and socialize primarily there as well? Or rather, do individuals from minority groups tend to cluster together residentially in sub-communities, create businesses and work in jobs that cater to the minority sub-community, and socialize together, in addition to taking advantage of opportunities in the majority community? Let us take as an example, a different sub-community – that of immigrants to a new country.

IMMIGRANT AND MINORITY ACCULTURATION: A NATURAL EXPERIMENT

Acculturation is the adaptation of one cultural or ethnic group to another as they come into consistent contact with each other. How do minority communities, people who are considered “other”, acculturate to the dominant community? This is often hard to determine when there are longstanding dominant-minority communities in contact, since the acculturation process has occurred over time. However, new immigrant and refugee populations provide a “natural experiment” in first generation acculturation. Since the end of World War II, refugee resettlement in the U.S. has been a public-private process. The federal government typically has contracted with private *voluntary agencies* (Volags), to find sponsor families to assist the resettlement of refugees, with some financial assistance from the federal government. When existing family members or ethnic communities of the refugees exist in the U.S., the refugees are often placed with them. However where no pre-existing community or family exists, refugees are placed wherever sponsoring families can be located. In practice, this means that the refugees are scattered throughout the U.S. (Wright, 1981).

At the end of the Vietnam War, few Vietnamese lived in the U.S. In 1975 when 130,000 Indochinese refugees came to the U.S., they were placed with sponsor families scattered throughout the country. By 1980, in a secondary migration based upon choice, a large percentage moved to a small number of communities in California (Portes & Rumbaut, 2006, p. 63). By 1990, almost half of the total Vietnamese population in the U.S. lived in a few communities in California, with seventy percent of those living in just four metropolitan areas (Zhou & Bankston, 1998). Kelly (1977, pp. 200-204) notes that these refugees moved from communities in Vietnam, to Vietnamese communities in relocation camps, and then to conditions of ethnic isolation when resettled around the United States. Their secondary migration after relocation was a search for community. By the time of Kelly’s 1977 study, one hundred Southeast Asian community organizations had formed, reflecting the growth of supportive community infrastructure. This typifies prior waves of ethnic immigration to the U.S., e.g., Italians, Jews, Irish, etc. and ethnic migration within the U.S., e.g., the First and Second Great Migrations of

Southern African Americans to the North. Some years after this secondary migration, some Vietnamese immigrants and their children remained in these ethnically concentrated communities, some moved to communities where there were few Vietnamese, and some moved to nearby but more diverse communities that allowed them to have activities in both the Vietnamese and the dominant community.

From this and other similar "natural experiments", it appears that often people from minority groups approach acculturation by forming sub-communities. These communities of similarity are often called ethnic enclave communities. If many in minority communities prefer to live and work in enclave communities, how do societies become multi-ethnic and pluralistic? John Berry's research summarizes what researchers have found. Berry (2005) found that individuals from minority groups utilize four "strategies" when dealing with the dominant community. Some choose "assimilation", a life predominately in the dominant community; some choose "rejection", a life predominately in the sub-community; some choose personal "integration" or biculturalism, a life that moves between the dominant community and the sub-community; and some choose "marginality", a life apart from both the dominant and sub communities.

Berry (2005) noted that most minority group members choose the bicultural approach of moving between the sub-community and the dominant community. Others have found that minorities move between these strategies at various times in their lives, including occupying multiple identities at the same time (Rudmin, 2003). Living predominately in the dominant community (assimilation), predominately in the sub-community, or moving between the dominant and sub-community (biculturalism) can all be successful ways for individuals to have community lives. A life at the margins greatly restricts social and economic opportunities, however. When mental health professionals focus on mainstreaming or normalization, they allow for only one of the three successful approaches to acculturation; that of assimilation or a life predominately in the dominant community. This relegates those who could be successful with the other two options, if they were available, to a failed or less successful community life. How many more people with mental severe mental illness and psychiatric disability could lead satisfying and productive lives if they could have the options of living within a sub-community or moving back-and-forth between the dominant and sub-communities for different aspects of their lives?

In addition to highlighting that we have restricted the three possible successful acculturation options to only one, Berry's (2005) work is useful to us in mental health for another reason. The only way that the sub-community and bicultural acculturation strategies are possible is if a fully developed sub-community exists. Without a fully developed sub-community, people who have experienced severe mental illness have only two possible "acculturation" options; they can try to be successful by assimilating or they can fail by becoming marginalized. That is, by not supporting the building of a fully developed mental health sub-community, we are relegating a large portion of those with severe mental illness histories to a failed marginalized status.

What would need to happen to fully develop a sub-community of people with severe mental illness? First, it is important to conceptually separate treatment needs, rehabilitation needs, and daily life needs. In contemporary mental health, both in the U.S. and in Italy, these three needs have been combined and usurped by mental health professionals. Mental health professionals appropriately provide medication and psychotherapy. Similarly, mental health professionals and paraprofessionals, often trained in different disciplines from treatment providers, appropriately provide rehabilitation services. In the U.S., increasingly some of these services are provided by "peer" staff, mental health workers with experiences as service users, and by service-user-run organizations. In these instances, the peer staff are working in professional-like helping roles, not in mutual support roles. However, increasingly mental health programs have come to provide the ongoing supports people need in their daily lives in addition to the treatment and rehabilitation services. In North American program models such as assertive community treatment, supported housing and supported employment, the daily life support needs are assumed by mental health staff. If a fully developed sub-community existed, many of these daily life supports would be provided mutually by community members, not by professionals or peers functioning in helping roles.

Second, a fully established sub-community requires the development of capacity among people with mental illness. Capacity is the skills and knowledge needed in a functioning community. An example is leadership. A sub-community needs individuals with leadership skills if it is to build and maintain itself. Sub-communities also have sub-economies, requiring people with entrepreneurial skills to build that economy. Sub-communities also have arts, necessitating people with artistic and performance skills. All aspects of community life require specialized knowledge and expertise, and a functioning sub-community assists individuals to develop those capacities to benefit the community.

Third, a functioning sub-community requires infrastructure. Infrastructure is the actual organizations and institutions that allow those with capacity to utilize it. Leaders need opportunities to lead. Entrepreneurs need opportunities to create businesses. Artists need workshop and gallery space, and performers need rehearsal and performance space. Without infrastructure, people with mental illness histories who have capacity, may never have the opportunity to utilize it. Because of the stigma and discrimination against people with mental illness (Link, Cullen, Frank & Wozniak, 1987), those with capacity or the potential to develop capacity are often excluded from infrastructural opportunities in the dominant community. Infrastructure in the sub-community allows for the development of capacity skills and knowledge, which benefits the sub-community. Moreover, it gives individuals with experience in the sub-community the option to utilize their skills and knowledge in the dominant community, if they wish.

Mandiberg (1999) points out that many mental health programs inadvertently build mutual support and the foundations of sub-community through the process of their programming, and then squander this when clients are discharged. This may be the result, in part, of the way mental health staff are often trained and the institutional context in which they operate. Many clinicians are not trained in community development. Thus, even if they recognized the community development potential of their services, they would not know how to assist its growth. Additionally, the reimbursement categories under which programs are paid for their services are overwhelmingly geared towards remediating psychopathology and dysfunction. Consequently, programs would not have a way of billing third party reimbursers, such as the government or insurance companies, if they wanted to engage in community development activities. However, there are some examples of mental health programs that demonstrate that sub-community is possible, and that provide for intriguing examples of how the development of that might be accomplished.

COLLECTIVIST AND MUTUAL SUPPORT MODEL MENTAL HEALTH PROGRAMS

The therapeutic community

At moments in history, mental health professionals have understood the value of the sub-community as a healing force for people with mental illness. Beginning in 1946, British psychiatrists developed new patterns of living within the psychiatric institutions. Termed “therapeutic communities” by Main (1946), groups of therapists and patients worked together to create a hospital environment in which traditional models of institutional authority were broken down, patients participated in the governance of the hospital community, staff and patient roles were blurred and open communication was highly valued. Initially developed for working with demoralized ex-soldiers and people with personality disorders, by the 1960s the approach was being employed with success in hospital wards for people with psychosis (Jones, 1968; Clark, 1974). The model programs, at places like Dingleton Hospital in Scotland, run by Jones, drew visitors and trainees from around the world and the model diffused widely (Warner, 2004). Eventually, deinstitutionalization and the switch to short hospital stays with ever-changing inpatient groups rendered the model infeasible for hospital work, but the approach has continued to prove useful for longer stay residential facilities like the Soteria Project in California, which aimed to use only minimal amounts of medication while residents with first episodes of illness recovered from psychosis (Mosher et al., 1975). Similarly, the same recognition of the healing and supportive role of mutual support at around the same time led to the development in the US of a community-based model which has only grown in importance since its inception – the psychosocial clubhouse.

The psychosocial clubhouse

The first psychosocial clubhouse, Fountain House, was founded in 1947 by ex-patients of Rockland State Hospital and for 30 years was the only one of its kind, enjoying an international reputation and entertaining hundreds of visitors each year. In 1976, Fountain House launched a national training program and in 1988 a national expansion effort. The International Center for Clubhouse Development was established in 1994 (Anderson, 1998; Macias et al., 2001; Propst, 1992a, 1992b), and by 2006, there were nearly 200 in the USA, and over a hundred in 26 other countries around the world (International Center for Clubhouse Development, 2006).

In the psychosocial clubhouse, people with mental illness are involved in operating a program that meets many of their vocational, social, support and recreational needs. In these programs clients, who are referred to as “members”, work side-by-side with staff in running the operations of the clubhouse during typical work hours. This may include putting together the newsletter, cooking and serving meals, collecting and collating program use information, or staffing the telephones and the reception desk. The clubhouse also is open in the evenings, on weekends and on holidays, providing a refuge for people who may live in cramped, cheerless housing and sometimes may not fit in well in other social settings. Clubhouses are physically separated from the mental health treatment programs and psychiatric treatment is not part of the program. The emphasis instead is on developing a sense of community, mutual support, work skills and job opportunities for the members.

Foremost among the basic components of the clubhouse model is, what clubhouse organizers refer to as, the “work-ordered day” – a structured 8-hour day in which members and staff work side-by-side on clubhouse work units. New members are only required to volunteer for work when they feel ready, but since they are assigned to a work group upon enrolment, the gentle pressure to become involved is always present. Another crucial element of the model is the democratic mode of decision-making and governance. Members and staff meet in open session to discuss policy and planning; no staff-only or member-only meetings are permitted. Other basic components include employment programs, such as transitional employment, and community support and reach-out to members (Macias et al., 2001; Propst, 1992a, 1992b).

The Chinook Clubhouse in Boulder, Colorado, is a good example of the model. It operates a supported employment program that locates jobs for the members in local businesses and trains and supports them as they settle into the new job. Participation in clubhouse work groups helps members prepare for jobs in the broader community. Often members who are working in a supported or transitional employment position will return for meals and meetings at the clubhouse to get support around their working life – support which may well not be available at the job site. The clubhouse program is not for everyone; some clients may be scared off by the emphasis on work and many clients with broader interests are not keen to mingle with other people with mental illness. Some come and go depending upon their needs at different points in time. Like immigrants and their attachment to their sub-community, they exercise their options as they choose, but those who take part in the program report a distinct improvement in their quality of life (Leff & Warner, 2006).

CHAPTER 10

The economic life of communities

Ethnic enclave communities have economies. These enclave sub-economies may not include all of the businesses and services that enclave community members need, but they often include those that are supportable by the community alone, such as ethnic grocery stores, clothing stores and other neighborhood-focused businesses. Some ethnic enclave businesses are also frequented by those from outside of the enclave community, the best example being ethnic restaurants. Greene and Butler (2004) refer to the minority community as a "natural business incubator". Enclave businesses give enclave community entrepreneurs opportunities to begin successful businesses without competing with better established and capitalized businesses in the broader community. In enclave economies, businesses hire enclave community members, who patronize enclave community businesses, which purchase their products and supplies from other enclave businesses. In this way resources cycle throughout the enclave's sub-economy.

Can people with psychiatric disabilities successfully operate the kinds of businesses an enclave community might need? To explore that notion, a group of service-users and social workers developed a mental health business incubator in Madison, Wisconsin, in the late 1990s called the Enterprise People (Mandiberg, under review). Two other business incubators, both in New York City, were also developed around the same time. Business incubators assist people with entrepreneurial ideas to start micro and small businesses by providing basic business skill training and consultation, office supports such as bookkeeping, legal services and access to business machines, and often office space where entrepreneurs can launch their businesses. The Enterprise People found that entrepreneurs with psychiatric disabilities could successfully own and operate their own businesses, as long as accommodations to the disability were integrated into the planning for the business. This is often described as "self employment", and there is a growing movement to assist people with many different disabilities to become self-employed (Doyel, 2000; Griffin & Hammis, 2003).

The three mental health business incubators found that most of the businesses that were successfully created were personal service businesses. Such businesses typically require low amounts of capital and easily acquired skills, and are sometimes referred to as "low barrier to entry" businesses. In the Madison incubator, higher barrier to entry businesses that had good potential were proposed by entrepreneurs. Typical higher barrier to entry businesses include retail shops, restaurants and manufacturing. However, gaining access to needed capital was a constant problem for these business ideas since people with psychiatric disabilities have poor or no credit histories. As a result, conventional sources of small business loans will not lend money to entrepreneurs with psychiatric disabilities. Some mental health and rehabilitation programs have developed modest loan funds to assist entrepreneurs who cannot get conventional loans. This includes active micro-loan programs similar to efforts in developing countries, such as the well known

Grameen Bank (Yunnus, 2007). However, these too are principally focused on low barrier to entry businesses.

Ethnic enclave communities often face a similar problem. Community members who are recent immigrants or who are poor cannot receive conventional bank loans. Enclave communities solve this problem by developing their own formal and informal savings and banking systems. Informal systems include personal and family loans and other Informal Value Transfer Systems (IVTS) such as Hawala in Islamic and Hundi in South Asian immigrant communities and (Passas, 2003). More formal systems include *rotating savings and credit associations* (ROSCA in the U.S., *tandas* in Mexico), family associations in Asian ethnic enclaves and hometown associations in Hispanic immigrant communities. Credit unions– nonprofit associations in which member depositors have voting rights – is an even more formal type of American banking institution that has proven valuable in enclave communities. Credit unions involve members in the operation of the organization, which then also builds capacity among the members through increased financial knowledge and decision making. Credit unions are particularly useful, then, in mental health enclave communities. People with psychiatric disabilities have low incomes and small amounts of savings and other assets. Aggregated together, however, they do have resources that can be used by the community collectively if banked. Additionally user-run organizations, family members and mental health professionals also have resources they might be willing to deposit in a mental health bank or credit union to benefit the mental health enclave community. Such a community institution would help individuals save and develop credit histories, but could also make loan decisions favorable to enclave community businesses. Just such a credit union is currently being planned by a user-run organization in New York.

An economic development approach

Paul Polak, a psychiatrist and development expert, has enjoyed success in creating grass-roots income-producing opportunities for poor people in the developing world, using the following approach: (1) evaluate the day-to-day economy of the disadvantaged group and the effect of economic incentives, (2) identify areas of the group members' production or consumption that might provide income-generating opportunities, for example, transportation, or allow them to retain assets they otherwise would spend (3) select a single business development idea which will leverage changes in several other domains of daily economic life, and (4) develop and market the innovation assertively (Polak, 2008).

Warner and Polak (1995) explored whether this economic development approach that was effective in low income communities in "least developed nations" might be useful in advancing the economic conditions of low income people with severe mental illness histories in high income "most developed nations". The goal was to develop service-user-employing businesses that would exploit the purchasing power of people with mental illness. Such an approach has the merit of re-circulating money through the community to create an economic multiplier effect, equivalent to establishing local ownership of the enclave community grocery store so that outside owners do not drain capital from the neighborhood. To pursue this goal, Warner and Polak interviewed 50 psychiatrically disabled people living in Boulder, Colorado, some employed and some not, to learn about their personal finances. The subjects were asked about their cash income, from working or from disability benefits; their non-cash income, such as goods and services provided to them, like psychiatric care, free medication, and subsidized housing; their cash expenses; and their non-cash expenses (goods and services that the subject provided to others). The total consumption market of the people in the survey was the combination of their cash expenses (what they spent, averaging $704 a month) and the non-cash income of goods and services (what they were provided, $1,405 a month). It was apparent that the consumers controlled some sizable markets – over $2,000 a month per person – in various goods and services. The top areas of consumption were psychiatric treatment, rent, food, medication, transportation and eating out. After reviewing the data, the researchers suggested that a number of community enterprises could be developed that would serve people with psychiatric disability, improve their economic circumstances and create employment for service-users. They included: (1) employing service-users in treatment-related services for people with mental illness, (2) a housing cooperative, (3) a food cooperative, (3) a user-oriented pharmacy, (4) a cafeteria, and (5) transportation services (Warner & Polak, 1995). Examples of most of these enterprises may be found in communities of people with psychiatric disabilities in different countries. Here we will discuss just two of these options that have proven to be valuable sources of employment and/or economic advancement for people with mental illness: (1) a user-oriented, user-employing pharmacy and (2) housing cooperatives.

A service-user-oriented pharmacy

Following a suggestion by Mandiberg, a user-oriented pharmacy was opened at the Mental Health Center of Boulder County in Colorado, in 1992, with the specific intent of providing employment and other benefits to the agency's clients. Profits from the Boulder pharmacy, which amount to $200,000 (€140,000) a year, are used to support other rehabilitation programs of the agency. The specialty pharmacy brings a number of benefits. Four service-users are employed part-time as pharmacy technicians alongside three full-time pharmacists. Medication prices are lower than anywhere else in the area. Customers and staff receive more education from the pharmacist on the effects of medication than they would from a high-street retail pharmacy, and pharmacy services are much better coordinated with treatment services than they were previously. Because of the success of the user-oriented pharmacy, the model is being franchised to other mental health agencies in Colorado.

Cooperative housing

When people with mental illness become property owners instead of tenants, they achieve a degree of social and economic advancement. Housing cooperatives provide a mechanism for poor people to own their accommodation and offer a number of advantages besides. They not only provide long-term affordable housing, they also create a better quality of life for residents, particularly those with special needs, by developing a feeling of community. They build leadership capacity and infrastructure among members of the cooperative through the financial, maintenance and managerial tasks required for the operation of the housing, and they sometimes create opportunities for employment (Davis & Thompson, 1992).

There are, however, relatively few successful examples of cooperative homeownership by people with mental illness for a variety of reasons. Mortgage lenders and potential residents may be put off by the cooperative governance structure. People with mental illness tend to be a fairly mobile group with little capital or monthly income. If hospitalized for a prolonged period, the person may lose financial benefits and be unable to pay the monthly assessment. In the US, recipients of disability benefits cannot accumulate capital to purchase housing without adversely affecting their eligibility for benefits. One attempt to create a housing association in which people with mental illness participated in a limited equity housing agreement, the Newell Street Cooperative in Pittsfield, Massachusetts, ended in failure. The project obtained a waiver that allowed governmental rent subsidies to be applied to the purchase of a four-apartment building; when the rent subsidy program was trimmed, however, the cooperative collapsed. During the one-year period that the cooperative was in operation improvements were noted in the participants' management skills, self-esteem and sense of mastery.

Despite the difficulties, housing cooperatives for the mentally ill can be viable. Some chapters of the National Alliance on Mental Illness (a US organization of relatives and friends of people with mental illness) have established non-profit housing trusts. The residents of these housing projects are usually mentally ill relatives of the investors. A trust of this type can establish small homes or large apartment complexes and arrange for the provision of other appropriate services. Increasingly mental health-focused housing development agencies are including service-users on their boards of directors, which makes these agencies more responsive to tenant initiatives, including tenant-owner and cooperative ownership arrangements.

Cooperative housing projects, whether the tenants are owners or not, can become sources of service-user/tenant employment. The Center for Urban Community Services, founded on the Upper West Side of Manhattan by Columbia University, offers supportive housing for people with mental illness and others at a number of locations. In this project, a private non-profit housing corporation owns the apartment buildings, the mental health agency provides treatment and case management to all the tenants, and a board composed of residents, mental health staff and representatives of the landlord manages the day-to day operations. Some tenants are given paid jobs on the 24-hour-a-day 'tenant patrols' which provide security and assistance to the residents of the different buildings.

Clustered apartments

When planning for housing for adults with psychiatric disabilities, service planners often seek dispersed housing. They want to avoid recreating the kinds of "mental health ghettos" that frequently occurred when people from state hospitals were dumped into a small number of low-income communities during deinstitutionalization. Planners hoped that by dispersing people in the broad community, the community would assume a large share of the support that people with psychiatric disabilities required. This is referred to as "community support" in American mental health. However, if the pathway to social inclusion and a successful community life is through enclave communities, as the acculturation research indicates, then there is an advantage in relying on other enclave community members for support. Further, if the broad community does not, in fact, provide the expected community supports, *people with psychiatric disabilities* placed in dispersed housing are obliged to rely on mental health professionals for that support. This occurs in program models such as supported housing and assertive community treatment. Is it better for people to receive their ongoing support through paid mental health professionals, or through mutual support?

A program in Santa Clara County, California, explored this notion in the 1980s and 1990s (Mandiberg & Telles, 1990; Mandiberg, 1995; Telles, 1992). Instead of dispersed housing, housing was located so that no one was more than about five minutes walking distance from each other. People were neither dispersed nor overly clustered. In the geographic center of this housing a space was rented for community activities. Instead of the clinical staff that is typical in supported housing programs, community organizers were hired and told that their task was to help foster a mutually supportive community. If mental health services were needed by community members, individuals or the community could ask for them from the regular mental health system. Three of these residential communities were created; one in a dense urban area, one in a suburban area, and one in a semi-rural area.

Mandiberg (1995) recounts what occurred when residents of these three communities began to experiences crises that were leading them to become hospitalized. They looked for a mutual support solution that would prevent residents from having to leave the communities when in crisis. They requested that the mental health system give them training in crisis services similar to how clinicians are trained. Then, each community developed a different within-community way of supporting community members who were in crisis. One of the residential communities copied a professional model, making one of their apartments into a "crisis apartment", moving community members in crisis into the apartment when needed, and staffing it when needed with other community members who had received the crisis training. Another of the communities decided it might be destabilizing to have the person in crisis leave their familiar apartment.

As a result, they decided that those with crisis training would move into the apartment of the person in crisis and support them until the crisis was resolved. The third residential community was operated by a Hispanic mental health agency, which had adopted a Mexican-American family model of support. In their community, the "family" rallied to support the member in crisis, using the methods they had learned.

Finally, we will turn our attention to a business approach, the social firm, and the opportunity it offers for enclave employment with a sense of community, and contrast it with a recently developed and effective U.S. vocational approach.

Supported employment versus social firms

For many years, the main employment opportunity for people with disabilities in the U.S. was through sheltered work (Black, 1970; Murphy & Rogan, 1995). Often sheltered workshops were established where only people with disabilities were employed. Their work was often low level assembly and packaging tasks, and people were paid based upon their productivity rather than an hourly wage. Highly productive workers could approximate or exceed minimum hourly wages, but less productive workers might be paid very little for their work. Additionally, workers in the sheltered workshops most often had little or no contact with people without disabilities, except for the rehabilitation staff of the workshops. Although this approach was cutting edge when it was developed for people with visual impairments in the middle 1800s and then over time adapted to people with physical disabilities, tuberculosis, intellectual disability and mental illness (Black, 1970), by the late twentieth century it was recognized as an overly restrictive model for many reasons.

In contemporary thinking about the employment of people with disabilities, the U.S. has favored integrated competitive employment with broad community businesses. In supported employment, job coaches locate jobs in businesses or agencies in the local community and often learn how to do the work themselves. The job coaches then help train people with mental illness to do the jobs and place them in the positions. Job coaches also advise employers on how to make workplace accommodations. Randomized controlled trials show the approach to be effective when compared to traditional vocational rehabilitation methods: around 40-60% achieve competitive employment in supported employment compared to less than half this number in the control groups (Bond et al., 2008). The most recent refinement of this approach, Individual Placement and Support (IPS), adheres to certain principles (Bond, 2004): readiness for work and the type of job to be sought is determined by the service-user's preference, not by screening and evaluation; job searching begins immediately, with no prior job readiness training; ongoing support from the job coach can continue for an unlimited time; and the vocational service is closely integrated with treatment services. Another principle of IPS is that competitive employment must be the goal. Advocates of the IPS model contend that people with serious mental illness who want to work can achieve competitive employment and that sheltered work settings are unnecessary.

The research on supported employment typically looks at job placement and program retention (Mueser et al, 2004), not job retention or job satisfaction. Some of the studies that have looked at job retention have found no difference between supported employment and other vocational interventions for people with mental illness (Lehman, et al, 2002; Wallace & Tauber, 2004). In both instances, job retention is not good. Residual stigma and discrimination towards people with psychiatric disabilities remains a problem in competitive workplaces. Psychiatrically disabled workers often feel that they are not truly accepted in the social environment of the workplace. Could retention be improved if workers with psychiatric disabilities had wider employment options? Furthermore, could those people who are unsuccessful in finding work through supported employment, benefit from the provision of other employment options?

One of those options is consistent with notions of mutual support and an enclave economy. Social firms are a form of congregate working environment that offer a sense of community support which is not available to those placed in dispersed supported employment positions. They are businesses created with a dual mission – to employ people with disabilities and to provide a needed product or service. Different from sheltered workshops, these businesses entail a great deal of interaction with customers, suppliers and non-disabled co-workers. The model was developed in Italy in the 1970s for people with psychiatric disabilities and has gained prominence across Europe. Independent of European influence, social firms have also developed in Canada, Japan, America and elsewhere. Common principles of the European firms include that over a third of employees are people with a disability or labor market disadvantaged; every worker is paid a fair-market wage; and the business operates without subsidy (Warner & Mandiberg, 2006). One manager of a social firm in Trieste described the community feeling that developed among the workers as "una piccola famiglia allargata" – a small extended family. In a worker cooperative, this communality can become altruistic, as when Trieste social firm employees choose to renounce their annual bonus to help the firm's financial bottom line. The supportive atmosphere may explain why the rate of transition from social firms into competitive employment is low in most countries (Seyfried & Ziomas, 2006). A recent report from Trento, Italy, indicates that nearly 60% of psychiatrically disabled employees of social firms prefer to continue in that type of employment; fewer than a third plan to look for work in the competitive labor market and only 12% want to quit working (personal communication, 2009).

In addition to fostering a sense of community in the workplace, social firms can empower individual employees and enhance worker commitment through their identification with their workplace and co-workers (Ashforth & Mael, 1998; Rousseau, 1998). Social firms can build a sense of identity and purpose among the workforce, resembling commitment to a social movement (Ellemers, 2001). This phenomenon is greater when social firms adopt an organizational form, like a cooperative, that enhances solidarity and mutual support.

CONCLUSIONS

Drawing an analogy with immigrant and ethnic minority communities, we argue that mainstreaming is not necessarily the best solution for many people with mental illness. Ethnic minorities have multiple successful pathways towards community. They can choose to live, work and socialize in the dominant community, they can remain in their sub-communities, or they can move back and forth, choosing some activities in each. We suggest that people with psychiatric disabilities should be allowed these same three choices and that we should not assume that integration into the broader community is the ultimate goal. Further, without the option of a strong and accepting sub-community, many people who cannot assimilate into the broader community are condemned to a marginal status, fitting in nowhere. With this in mind, we cite successful models such as the therapeutic community and the psychosocial clubhouse model that build on the value of the community of people with psychiatric disability. We discuss business incubators that help community members develop micro-businesses and the possibility of a user-friendly bank to assist in capitalizing such ventures. We describe an economic development approach which points the way to enterprises that can advance the economic circumstances of the service-user community and offer members of the group work opportunities and leadership roles. Finally, we highlight the mutual support advantage which is present in the social firm approach to creating job opportunities when compared to the supported employment model.

The examples of sub-community discussed above merely hint at the possibilities if this community and economic development approach was adopted by mental health authorities and clients. The examples given, necessarily brief, do not go into detail about the difficulties those implementing these approaches needed to overcome in order to achieve stability and desirable outcomes. Additionally, creating formal social and economic sub-community infrastructure raises a large number of researchable questions about the effects on participants and desirable and non-desirable outcomes. For example, as discussed above, although currently many mental health interventions create unrecognized interdependent mutual support among service users, this support is informal. Will acknowledging the formal support role within the sub-community create undesirable stresses for individual sub-community members? The success of clubhouses in recognizing and fostering this type of mutual support suggests that it does not create undue stress, but this needs to be investigated in other contexts. The experience of some social firms suggests that achieving a break-even point, where the business does not require a subsidy, is difficult especially when the entire workforce is comprised of people with psychiatric disabilities. Efficiency may be sacrificed in favor of social rehabilitation. Some social firms, for example Type B social cooperatives in Italy, have sought to solve this issue through a mixed workforce of people with and without recognized disabilities. The field needs to discuss the pros and cons of the various solutions to this issue.

The point is not that the social and economic development of mental health enclave and sub-communities will solve all of the problems of the current mental health system. However, developing such communities does expand the possibility that many individuals who currently are relegated to dependency on mental health professionals or a life of social exclusion can find other ways to achieve a satisfying community life in the context of recovery.

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ALEX GRECH

CHAPTER 11

BEYOND NETWORKED INDIVIDUALISM AND TRIVIAL PURSUIT

Putting disruptive technologies to good use

> The web is more a social creation than a technical one. I designed it for a social effect – to help people get together – and not as a technical toy. The ultimate goal of the web is to support and improve our web-like existence in the world. We clump into families, associations and companies. We develop trust across miles, and distrust around corners. (Berners-Lee, 2000 p. 123)

In recent years, people with access to a computer and an internet connection have had the capability to deploy social media technologies to identify, mobilise and lead online tribes[i] and start to break down some of the barriers to more inclusive communities. This chapter argues that despite long-standing concerns about the digital divide, privacy and control, access to disruptive technologies by networked individuals offers an opportunity for the creation and distribution of information without mediation. Although online tribes may be more ephemeral and temporal than offline networks, they may also lead to activism beyond geographical confines, with new leaders empowered to raise their voice and engage with a sense of purpose, creating new stocks of social capital in the process.

THE RISE OF SOCIAL MEDIA

Over the past three years, ‘social media’ has become a term associated with a social and technological phenomenon, primarily because of the exponential growth in user adoption of a set of commercially-supported, Internet-based applications that build on the ideological and technological foundations of the read/write web or Web 2.0,[ii] and that allow the creation and exchange of user-generated content (Kaplan & Haenlein, 2010). Social media technologies can loosely be grouped into the following categories: wikis, blogs, micro-blogs, photo-sharing sites, slide-sharing sites, real search syndication (RSS), social networks, social bookmarking, podcasts, video-sharing and instant messaging. Most social media technologies are free for the end user for the basic services, helping make them mainstream tools of

A. Azzopardi and S. Grech (eds.), Inclusive Communities: A Critical Reader, 167–182.

choice to communicate across time and space with individuals and groups of any size. The Nielsen Social Media Report for Q3 2011 says that across a sample of 10 global markets, social networks and blogs are the top online destination in each country, accounting for the majority of time spent online and reaching at least 60 percent of active Internet users. Facebook, a social networking site, grew from 100 million active users in August 2008 to over 750 million by August 2011.[iii]

According to Graham (1999, p. 37) the marks of a truly transforming technology are twofold: the ability to serve recurrent needs better (qualitatively as well as quantitatively); and having a major impact upon the form of social and political life. Social media appears to meet these requirements. The significant media shift is from the 'one-to-many' broadcast mechanism to a 'many-to-many social exchange model', rooted in online conversations between authors, people, and peers. This model has created opportunities for people with similar interests, values, or ideas to participate, connect, interact, collaborate, produce, network and form relationships. Citizens have tools that can transform them from passive content readers into publishers, getting close to the ideal of 'citizen media' (Rodriguez, 2001) where groups of like-minded individuals can collaborate and mobilise towards a common cause, without mediation.

In practice, the collaborative environments of the 'read/write web' at the root of online social media networks have existed on the internet since the 1980s, when popular internet forums such as the WELL[iv] led to the coining of the term 'virtual community' (Rheingold, 1993). Within this context, social media can be seen to be the latest stage in the evolution of the information society, as we begin to see a series of economic, social, and cultural adaptations that make possible a radical transformation of the information environment we occupy as autonomous individuals, citizens, and members of cultural and social groups (Benkler, 2006, p. 1).

What social media has particularly facilitated is the empowerment of individuals: as opposed to communities organised by topic, the media celebrates personal (or egocentric) networks, with the individual at the centre of their own community (Boyd & Ellison, 2007), with the capacity to increase social ties and interaction, provide an outlet for self-expression, and assist in helping with information seeking and task completion (Gallant, Boone, & Heap, 2007). The updated claim for Web 2.0 is about harnessing collective intelligence, where value is facilitated by technology, but co-created by and for the community of connected users (O'Reilly & Battelle, 2009). As we move away from the old mass media topology of information networks from the hub and spoke to a distributed architecture with multidirectional connections, passive consumers of mass media formerly known as the audience (Gillmor, 2006) have the means to become active participants and producers of the networked public sphere, with increased freedom to participate in creating information and knowledge (Benkler, 2006). There are frequent claims that social media contributes to a reinvigorated public sphere – free of central organisation (Farrell & Drezner, 2007), with the potential for expression ranging from collective action to a virtual private square (Papacharissi, 2009). In practice, there are several, different levels of individual participation within this new public sphere. Li and Bernkoff (2008) developed a social technographics profile that grouped people according to the way they participate in social media*:* *Inactives, Spectators, Joiners, Collectors, Critics* and *Creators*. They coined the term ‘groundswell’ to explain the practice whereby people increasingly use web 2.0 technologies to get the things they need from each other, rather than from traditional institutions such as corporations, teaching institutions, or indeed their immediate geographic or socio-economic communities. Levering on the groundswell concept, there are three primary reasons why the time is now ripe for this groundswell to become more inclusive:

1. Technology Diffusion: Information and communication technologies (ICTs) continue to spread throughout the world as more people gain access to the internet and its wealth of information and applications. Access to the internet via mobile cellular networks has grown rapidly with the increasing availability of IMT-2000/3G networks and enabled devices, including mobile handsets and data cards that allow users to access the internet over the mobile cellular network using their computers. Internet access speeds are also increasing, with fixed broadband replacing dial-up in most developed countries, accompanied by a decline in tariffs. According to ITU (2011), by the end of 2010, in developed countries, mobile-cellular has reached saturation, recording penetration rates of over 100 per cent, and a growth rate of only one per cent during the past year. Mobile growth in developing countries remains buoyant, at 20 per cent, with subscriptions corresponding to 70 per 100 inhabitants at the end of 2011. Mobile cellular penetration in developing countries has more than doubled since 2005, when it stood at only 23 per cent.

2. Economics: The human instinct to belong to a group that shares, cooperates and acts in concert online has to date been constrained by costs of transactions, subscriptions, downloads etc. The fact that the primary social media tools are free and readily-accessible to anyone with an internet connection has not just led to mass consumer take-up, but also turned long-standing business models on their head. Technology **c**onvergence has finally found the mass user-generated content it requires to flourish; but up-front investments in infrastructure and innovation need to be monetised, and the capitalist model is still struggling with ‘freeconomics’ (Anderson, 2009). Content and basic services are given away for free to the majority of users in the hope of selling premium services to entities who are attracted to the huge number of users congregated on a particular social media platform. There are many concerns that the price being paid for the ‘freemium’ model is user privacy, with user-generated data being used for the profit of companies such as Facebook and Google who are at the hub of the crowd-sourcing around social media applications. O’Neil (2009, p. 23) puts this succinctly:

> The traditional libertarian concern for privacy has its limits: when it contradicts the profit motive. For the exhaustive profiles listing people's most intimate material, spiritual or consumer preferences – which they have themselves helpfully created – legally belongs to the owners of Facebook, and to the advertisers they sell this information to. In informational capitalism individual users can freely copy and distribute digitised corporate content, and corporations can freely copy and distribute digitised user-generated content.

3. Social Engagement: The most sweeping claim for social media is that it facilitates direct democracy by allowing ordinary citizens to bypass the mediation of elites and information gate-keepers and challenge hierarchical discourse and authority. The advent of web 2.0 combined with the global uptake of mobile technology provides citizens with the opportunity to move seamlessly from content consumers to publishers, participants and even activists. If everyone can have a voice and everyone can link to everyone else, the promise is that no one is in a position to dictate what anyone else can say or do. Inspired individuals can use the new technologies to engage with others in initiatives relating to migration, disability, ethnicity, racism, youth positioning and (dis)empowerment, identity, gender issues, crime and deviance, labelling, stigma, social policy, activism, globalisation, citizenship, human rights, social exclusion, and social cohesion.

There is a wealth of recent events to support the claim that social media is enabling social engagement and political activism. On 26th December 2004, within hours of the Asian tsunami, a blog[v] was set up to coordinate a sustained collective aid response from around the world, far more quickly than any regional government: more aid was contributed via this source than any individual government's effort. Facebook has been used as a platform to build connections and organise actions – from the 2008 protests against the Colombian FARC, a 40-year old terrorist organization, to fighting oppressive, fringe groups in India. Costa Ricans used Twitter to coordinate efforts to share new information and help victims of a major earthquake in 2009. The Arab Spring saw widespread use of Facebook and Twitter in Egypt, Tunisia, Yemen, Syria and Libya, leading Shirky (2011) to claim that social media have become 'coordinating tools for all of the world's political movements'. Indeed, 2011 will be remembered as the year for much populist and utopian discourse about 'Twitter and Facebook revolutions', fuelled by the embracement of social media by major news networks such as CNN and Al Jazeera.

POWER TO THE NETWORKED INDIVIDUAL

Online tribes are rooted in networks of micro groups that are likely to be transient. Maffesoli (1996) predicted that as the culture and institutions of modernism declined, societies would look to the organisational principles of the distant past for guidance, and that the post-modern era would therefore be the era of 'neo-tribalism' – small groups of individuals distinguished by shared lifestyles, tastes, a common subculture and complexes of meanings. These neo-tribes might not exist for a long period of time, or might even be unstable or small scale, not fixed by any of the established parameters of modern society. O'Neil (2009) concurs on the temporal nature of 'neo-tribes': they may happen to have goals and finality, but this is not as essential as the energy expended on constituting the group as such, and the capacity to switch from one group to another. In contrast to the stability induced by classical tribalism, based on ethnically and culturally fixed membership, neo-tribalism is characterised by fluidity, occasional gatherings and dispersal.

The temporal yet intensive aspect of these neo-tribes and the propensity of their members to 'switch' from one group to another are reminiscent of Wellman's (2002) view that when people have a strong sense of community and sense of belonging they will mobilise their social capital more willingly and effectively[vi] – but that they will also operate under the guise of 'networked individualism'.

> The shift to a personalised, wireless world affords networked individualism, with each person switching between ties and networks. People remain connected, but as individuals rather than being rooted in the home bases of work unit and households. Individuals switch rapidly between their social networks. Each person separately operates his networks to obtain information, collaboration, orders, support, sociability and a sense of belonging. (Wellman, 2002, p. 15)

This chapter's tenet is that engagement with social media and membership of an online tribe can contribute to an individual's social capital – particularly for individuals who feel marginalised. Definitions of social capital typically contain elements of social networks, social support and trust. Indeed, Bourdieu's definition of social capital (1986, pp. 248-249) resonates of the new tribes:

> … the aggregate of the actual or potential resources which are linked to possession of a durable network of more or less institutionalised relationships of mutual acquaintance and recognition – or in other words, to membership in a group – which provides each of its members with the backing of collectively-owned capital, a 'credential' which entitles them to credit, in the various senses of the word.

Online tribes can also be viewed as the arena where new stocks of social capital are created and maintained. Being able to manage Twitter effectively to connect with people with similar interests or set up a sustainable Facebook page for a cause or an event, is likely to provide the user with incremental 'status' in the online communities in which he/she chooses to engage in, which may not be possible in the offline world. Such online activity may also enhance, stimulate or support existing face-to-face relationships, thus increasing stocks of existing social capital in the process. There are no hard and set rules as to how and when this happens. In small, bounded societies like the Mediterranean island of Malta, where I live, and where 47%[vii] of the population is on Facebook, it is easy to meet up with people face to face after you have engaged with them online: it may not be so practical in other places. According to a report from the Commission of European Communities (2009), internet use is also associated with the increased likelihood that users will engage in civic activities. In fact, while about half of internet users reported their participation in social activities, only a third of non-internet users did so. Clearly this requires further investigation.

Social network theory has long held that individual centrality in a network is strongly associated with knowledge and power. I believe that the individual's *ability* to use social media tools *strategically* is vital if they are to contribute to a more inclusive community. Lovink (2005) says there are no networks outside of society, and like all-human techno entities they are infected with power – undermining power as they produce it. Foucault revealed the reciprocal connections between power and knowledge.

> Knowledge, once used to regulate the conduct of others, entails constraint, regulation and the disciplining of practice. There is no power relation without the correlative constitution of a field of knowledge, nor any knowledge that does not presuppose and constitute at the same time power relations. (1977, p. 27)

Breaking down the barriers to more inclusive communities requires the knowledge to operate the online tribe as a Foucault power machine, on a range of scales, traversing intra-local networks and overlapping with trans-national insurgencies. Social media represents an opportunity for individuals who are excluded or marginalised from the mainstream and who have access to the internet to set up, lead and mobilise tribes around shared interests. It empowers not just individuals, but the emergence of passionate groupings around leaders and common interests. Geography and proximity, so long attached to the concept of community, have become superfluous to those with access to the internet – so tribes can operate as dispersed social networks. In fact, people may have a stronger sense of solidarity within networks of interest because they are based on choice and consciously shared interests rather than on what may be the accident of shared location (Michaelson, 1996).

In the same way that people may need the comfort of others in their same situation, they may also seek to pass as members of other (more-inclusive) tribes. The sense of 'community' may not necessarily mean finding people 'of your own kind' but also others who may not know of your 'marginalised' status – or indeed other people who feel equally marginalised, for totally different reasons (e.g. disabled people and ethnic and racial minorities), and seek comfort in connecting with others through social media. Within some of these, you may have no desire to demonstrate that you are, indeed, disabled, black etc. And this desire to 'protect' or even fake identity may well be another aspect of social media interaction that needs to be investigated: the propensity of people who are typically marginalised to pass themselves as less-marginalised using the blanket cover/anonymity of the internet, hence pushing for a serious questioning and exploration of issues of identity and identification.

The mainstream *trust* in all things digital and social media in particular, as demonstrated by the mass user take up of social media networks, is also contributing to a gradual growth in offline, face to face, interpersonal relationships. Wellman (2002) believes that the internet is used to complement other forms of communication, which leads to an overlap between online and offline interactions, suggesting the emphasis should be placed on how online communities become integrated with physical communities. Castells (2001, p. 131) argues that:

> Individuals build their networks, on-line and off-line, on the basis of their interests, values, affinities, and projects … what we observe in our societies is the development of a *communication hybrid* that brings together physical place and cyber place.

To make the hybrid become the norm, online interaction becomes the glue before and after face to face meetings in the physical space. We appear to have rapidly moved away from virtual communities of people who connected online and never met, to a multi-directional networked society. Ferlander (2003) believes that the only difference between virtual and physical communities is in the mechanisms of communication used, and not necessarily the meaning of the relationships involved, the social process they encompass, or the effect they have on their members. Again, this does not imply that online communities can or will replace the need for human contact and face to face communication or satisfy emotive and other (for example sexual) needs: but our social worlds are rapidly going digital regardless, fuelled by the take up of devices such as the iPhone and the iPad, and the applications mushrooming around them.

It's way too early for nirvana

The hypothesis that social media facilitates the set up of online tribes and hence contributes to social inclusion is subject to a number of caveats, many of which may be uniquely or collectively more powerful than any individual's desire to set up and participate in online tribes. Digital inclusion is increasingly becoming a prerequisite for social inclusion in contemporary society, notably in technologically developed settings and where technology is more or less available to most irrespective of social, cultural, economic and political differences. Castells (2001, p. 277) notes that in a global economy and a network society where most things that matter are dependent on internet-based networks, to be switched off is to be sentenced to marginality.

For social media to contribute to more inclusive communities, the technologies must open up community voices and participation (Pettit et al., 2009). They must facilitate social, political and cultural models that are free from interference by the state, market actors, and multilateral agencies; produced by the local community in their own language for their own consumption on issues that they themselves deem relevant to their needs and so 'alternative' in content from the dominant media. Media and communication can no longer be reserved as engineering tools of hegemonic and centrally located actors – they have to become personalised, readily-accessible tools for the weak and marginalised, so the latter may define, claim, and give meaning to their citizenship, and re-create the social and political openings and alternative spaces where their voices might be heard (Saeed, 2009).

As a medium, technology is far from neutral: the daily escalation of computer use reproduces and strengthens social divisions related to gender, age, education and work. The ‘digital divide’ threatens to exacerbate existing social disadvantage. Ironically, the technology that holds the key to more egalitarian participation could well become the instrument of further discrimination (Seymour, 2001).

The ‘digital divide’ is a ‘relative concept’ and compares the level of ICT development in a country with another at a certain point in time. It is often associated with imbalances in access to physical infrastructure, such as computers and internet; or conventional communication infrastructure, such as fixed telephone lines. In 2011, the digital divide remains a significant barrier to inclusive communities. According to ITU (2011), fixed internet access in developing countries is still limited (especially in dispersed rural areas), and, where available, often slow, unreliable and/or expensive. While fixed-broadband penetration in developed countries was almost 24 per cent at the end of 2010, in developing countries it reached only 4.2 per cent.

Over the past 36 months, the global take up of social media technologies has addressed some of the initial fears associated with technology – that it would be confined to traditional computer users, such as young well-educated men from high social strata. However, in the case of traditionally disadvantaged groups *without access to ICT*, there is a real risk that the digital divide will only perpetuate existing inequalities and in fact get worse. Castells (1999) refers to the digital exclusion of poor countries and neighbourhoods as ‘technological apartheid’. Indeed, differential access to technology may be perpetuating existing social, economic and political inequalities with long historical lineages, as well as creating new ones.

Putnam (2000) asserts that the digital divide must be challenged directly if social capital is to be created, citing the internet as a kind of twenty-first century public utility. It becomes the obligation of governments to address the issue by providing access to ICT and the internet and train people in computer skills as a basic right (collective ideal). Instead, recent history is riddled with examples of governments such as Venezuela’s trying to block access to social media. On 2nd June 2009, in the run up to the tenth anniversary of Tiananmen Square, China followed a long-standing ban on YouTube by blocking access to several sites including Twitter, Flickr, Wordpress and Bing; Facebook was blocked on 7th July 2009 (Wauters, 2009). In May 2010, Bangladesh briefly blocked access to Facebook after satirical images of the prophet Muhammad and the country's leaders were uploaded. Twitter users managed to foil Iran’s clampdown on international media reporting during the June protests, with the US state department asking Twitter to postpone planned maintenance to enable Iranians to tweet on events in their cities (Parr, 2009). Many Western Governments, including the UK, took the lead of the Obama Washington.gov portal and set up portals with links to social media platforms in a show of ‘open government’ intent to engage with citizens in a more open, personal and transparent manner. And yet, on 11 August 2011, in the middle of the UK riots, Prime Minister David Cameron said that his Government was considering turning off social networks to prevent people using technology to plot ‘violence, disorder and criminality’ (Cameron, 2011) – at the same time that citizens were using Twitter to mobilise city centre clean ups.

The hope remains that as 99% of the content on the Web is privately owned, governments can only own the pipeline that transmits it, not what flows through it (Krotoski, 2009). So one could add that communicative capitalism is far from dead: attempts at global regulation such as the *Stop Online Piracy Act* (SOPA) in the US and the Anti-Counterfeiting Trade Agreement (ACTA) proposed in 2012, are being resisted by citizens who defend the notion of the 'free Internet'. Nevertheless, although the ubiquitous use of social media and mobile technologies has received global attention because of the Arab Spring, the assumption of their automatic democratic empowerment remains optimistic and narrowly techno-centric. For instance, further research needs to be undertaken to understand how a new media ecosystem may be emerging, where social media operates in tandem with other mainstream, community and citizen media in contributing to communicative efforts for democratisation, empowerment and social change.

Concerns about privacy on online social networks attracted much mainstream media attention in April 2010, when Facebook was widely perceived to be tampering with its users' privacy settings as part of a systematic strategy to use personal information for profit. Facebook responded quickly in May 2010, providing users with more control over how content and basic information is shared, and an option to turn off all applications.[viii] At the time of writing this chapter, there are many who believe that Facebook's global reach and subscription base merit the company to be regulated like a public utility company. Google appears to have learnt lessons from its clumsy launch of its Buzz social network in February 2010 by providing several privacy features when launching its Google+ service in June 2011. In the future, it is inevitable that users of social media technologies will have to weigh up the trade-off between the benefits of free, ubiquitous, useful technologies and trusting powerful, private companies with their most intimate data, without a full understanding of how that data is being used in the provider's business model. As long as the means of production are available for free to networked publics and the tools and platforms are owned by corporations, the risk of regular breaches of the 'social contract' between the two parties remains very real.

Academic concerns frequently cite that online social networks are simply equated with the technologies they use, without a coherent grasp of the social, cultural, and political processes involved in making them transformative and sustainable. Views about the outlook for the future of social media networks remain polarised: from optimism about their transformative potential (Tapscott, 2006; Leadbeater 2008; Shirky, 2008), to concerns about Internet freedom (Goldsmith & Wu, 2006; Lessig, 2004) and accusations that unmediated, user-generated content is leading to the collapse of culture as we knew it, through the loss of traditional gate-keepers (Keen, 2009; Lanier, 2010). Rheingold (2010) proposes a new type of education, if the new social channels are to be used for advocacy and knowledge management purposes, as opposed to passive consumption:

> Attention is the fundamental literacy. Digital media and networks can only empower the people who learn how to use them – and pose dangers to those who don't know

> what they are doing. Those people who do not gain fundamental literacies of attention, crap detection, participation, collaboration, and network awareness are in danger of all the pitfalls critics point out – shallowness, credulity, distraction, alienation, addiction.

Inevitably, social technologies can also turn ugly: there is a disturbing trend in sites being used to disseminate online terror and hate campaigns. The power of an online, free platform to reach a potentially global audience will not be lost on people with dubious objectives. Castells (2003, p. 94) says that: "the network structure of the Internet reproduces the autonomous, spontaneous networking of militia groups … without boundaries, and without a definite plan, but sharing a purpose, a feeling and most of all, an enemy".

In 2010, the Simon Wiesenthal Center identified around 8,000 social media sites with elements of religious terror groups, anti-semitism, racism, xenophobia and the likes – an increase of 30% from the previous 12 months. Facebook groups and *Second Life* have been identified as potential communication and event-planning tools for terrorist and hate groups (McCarthy, 2009). Even micro-states like Malta have their share of racist, xenophobic blogs, such as vivamalta.org, run by extreme right-wing organisations promoting a homogeneous Maltese identity and culture to counter the perceived invasion of the island by refugees from Africa. As more and more people cluster around social networks, extremists are going to the same sites.

WORKING TO REMOVE THE BARRIERS

And yet, the disruptive technologies remain remarkably resilient despite visible or covert attempts at control by corporates or censorship by governments. Information flows quickly online, and the lack of visible intermediaries empowers new citizen journalists and activists. For every dubious social media application, there are hundreds of initiatives such as *Business Fight Poverty, Bottom of the Pyramid, Social Entrepreneurs and Knowledge Management for Development (KM4DEV).* Ushahidi, a non-profit company developing open source software played a prominent role during the 2008 post-election crisis in Kenya in crowdsourcing crisis information. Avaaz.org, a global campaign and petition network with more than 6 million members from over one-hundred countries, is an example of the global-local nexus at the heart of e-participation and -mobilisation. NGOs and charities have been particularly adept at using social media channels to raise their profiles and conduct fund-raising campaigns targeted at user groups most likely to be responsive to the 'message'.

If we are to believe as Benkler (2006) does that access to knowledge has become central to human development (p. 302) and that the welfare and growth of developing and less-developed economies and societies rely heavily on the transfer of information-embedded goods and tools, information, and knowledge from the technologically advanced economies (pp. 354-355), there is a compelling argument to resist attempts at control and privatisation of social media platforms; and to lever these as tools through which innovation, research and development can be pursued by local actors in the developing world itself. The emergence of peer production may provides new solutions to some of the problems of access to information and knowledge, particularly when trying to work around the barriers that the international intellectual property regime places on development. There is a growing awareness of the human cost of relying solely on the patent-based production system, and of the potential of the commons-based strategies to alleviate these failures.

The great hope for closing the digital divide is wireless-broadband. With the introduction of high-speed mobile internet access in an increasing number of countries, the number of mobile broadband subscriptions has grown steadily and in 2010 surpassed those for fixed broadband. In poor and emerging economies in the global south, wireless-broadband including prepaid mobile broadband is mushrooming, and Internet users are shifting from fixed to wireless connections and devices. Poor countries, particularly in Africa, see mobile as a core, rather than a complimentary internet technology (ITU, 2010). By the end of 2010, around 30 per cent of the world's population was online, up from 12 per cent in 2003 and 6 per cent in 2000, with much of the growth driven by large countries such as China, Brazil, India, Nigeria and the Russian Federation. Conversely, about 80 per cent of the developing countries' population were not yet using the Internet.

As Di Maggio et al (2004) suggest, we need to move from just focusing on the digital divide" of "haves/have-nots" and "users/non-users" to the full range of *digital inequality* in equipment, autonomy, skill, support, and scope of use among people who are already online. It is just as vital to provide people with the skills to enable them to use the internet and social media effectively, as solving the inequalities in access to ICT. Social media also provides a new opportunity for corporates to meet social responsibilities by addressing a wide array of environmental, social and governance issues, including those relating to a more inclusive society (Bonini et al., 2009). NGOs and key individuals engaged in social media would benefit from following simple rules such as: researching online communities relevant to the target audience (listening); monitoring these communities to determine etiquette and community culture; participating only when relevant to share valuable information; engaging with transparency about affiliations to build trust within the eventual tribe.

Open source continues to thrive, driven by the 'hacker ethic' of people who may never meet or know each other and yet collaborate online to build technologies for the benefits of others. There are tribes of people who program enthusiastically in the belief that information-sharing is a powerful good, and that it is an ethical duty of hackers to share their expertise by writing free software and facilitating access to information and computing resources whenever possible.[ix]

Although trust between online users is often perceived to be fragile, the lack of physical clues on the internet also creates fewer prejudices and enables marginalised groups, such as disabled people or those with low self-esteem to participate more equally with other people. The closed membership of online community sites has the benefits of a walled communication garden. Many online tribes self-regulate: members have to engage with respect; bullies get kicked out; crises are managed, sometimes more publicly than in the offline world.

The One Laptop per Child (OLPC[x]) project is supported by academia, industry, the arts, business, and the open-source community committed to providing a 'rugged, low-cost, low-power, connected laptop with content and software designed for collaborative, joyful, self-empowering learning 'to more than one billion children in the emerging world that don't have access to adequate education (OLPC mission statement)'. In small countries such as Malta, Internet and PC access is subsidised by local government, with local councils providing centres where people can use a PC and access the internet at local council premises. The internet café is still ubiquitous in urban areas, and plays a role in overcoming the digital divide with impact on social exclusion, the decline of social capital and loss of community. Following the lead of the Obama administration, social media technologies are also attracting the attention of governments in poorer countries, interested in deploying cost-effective applications to facilitate access to public information, enhancing information literacy and 'humanising' the process of 'open government'. Public sector and other non-profit institutions that have traditionally played an important role in development can do so with a greater degree of efficacy by taking the lead in putting open source, social media technologies for the benefit of more inclusive societies.

CONCLUSIONS

This chapter's central argument is that the strategic use of social media by skilled individuals provides access to shared local and worldwide networks. This has a significant potential for the creation of new social capital for marginalised communities with access to the internet. Social media also provides the platforms for the mobilisation of minority groups. Ethnic minorities can set up multi-lingual community sites to help new arrivals in a host country and help provide unsanitised information on issues such ranging from culture, language, religion, gender and sex to financial structures. Social media enables inspired individuals to set up and manage a variety of tribes – without losing their own individuality and identity in the process. It may provide a platform for those who feel marginalised and isolated by connecting them with people who are not in the same physical environment. It facilitates social participation at a low cost across physical and temporal barriers. The true value of social media is in the combination of virtual and real community, online and offline interaction between members of the tribe. Having access to the internet and social media provides opportunities for certain disadvantaged people to bridge visible or perceived gaps, and bond with people that they would not normally feel able to engage with.

Although social media take-up is dominated by the Western world, the list of countries with the fastest growing numbers of Facebook users over the past 12 months includes countries such as Indonesia, Romania, the Philippines and Colombia.[xi] Trust in word of mouth appears to be as strong in Western paradigms as in the close-knit communities prevalent in non-Western contexts.

The corollary is that no amount of available technology will prevail over one key factor: the human will to put new social media tools to good use and engage with others. The risks of digital and social exclusion have not disappeared; in some cases, they get even worse as certain disadvantaged groups continue to be excluded from the internet. It has become necessary to have access to the internet, computers and the skills to use them in order to be able to participate more fully in contemporary society. It is also becoming easier to become disconnected from face to face social interaction and withdraw to one confined in front of a monitor. Social media can therefore be both anti-social and empowering. It can be used to bring tribes together or tear people apart. The implications and ramifications of the new interaction will continue to unfold. There is both freedom and loneliness in the options opened by social media.

Our desire to 'belong' without losing either our sense of individuality or identity means that the notion of community itself is changing – smaller, in harder times, but also potentially stronger. It is just a different type of community: tribal, transnational, online, which requires digital literacy and transliteracy (Thomas et al., 2007) and critical engagement with the functionings of these new and consistently dynamic groupings. Social media provides an unprecedented opportunity to find, join and lead a tribe, and to start working at wearing down the barriers to whatever keeps citizens marginalised and on the outside.

NOTES

[i] In this chapter, a tribe refers to a group of individuals who use web 2.0 technologies for online social interactions. They are social formations which favour grassroots direct democracy, the pleasurable provision of free gifts, and the feeling of proximity to others. Maffesoli (1996) uses the term 'neo-tribes' to describe new forms of sociality based on proxemics, the feeling of belonging. The emergence of mobile communications and pervasive computing led to Rheingold (2003) coining the term 'smart mobs'. Godin (2008) defined tribes as groups of people, connected to one another, connected to a leader and connected to an idea that inspires their passion. I use the term 'tribe' as opposed to 'community' as it indicates a more proactive degree of individual engagement online.

[ii] The term 'Web 2.0' was coined by Tim O'Reilly, to describe the second generation of web-based communities and hosted services that evolved after the 'dot.com' crash of 2001 (O'Reilly, 2005; O'Reilly & Battelle, 2009). Web 2.0 is distinct from Web 1.0 in that its sites are interactive and allow users to do more than just retrieve information: it includes a social element where users generate and distribute content, often with the freedom to share and reuse under a Creative Commons licence.

[iii] Available at http://www.facebook.com/press/info.php?statistics (Accessed 18 September 2011).

[iv] Whole Earth 'Lectronic Link.

[v] South-East Asia Earthquake and Tsunami Blog http://tsunamihelp.blogspot.com/.

[vi] It is perhaps important to note that the increased attention paid to social capital is both a western enterprise, and notably in the context of increased neoliberalism and associated reductions in public sector intervention, as well as increased individualism (see Grech, 2009).

[vii] Available at: http://www.facebakers.com/countries-with-facebook/MT/?chart-interval=4 (Accessed 18 September 2011).

[viii] Facebook (2011). Privacy policy explained. Available at: http://www.facebook.com/privacy/explanation.php (Accessed 18 September 2011).

[ix] Raymond, E. (1996). *The new Hacker's dictionary*, 3rd edition 1996, cited in Himanen, 2001, p. vii.

[x] OLPC mission statement available at: http://laptop.org/en/vision/index.shtml.

[xi] Facebakers (2011). Countries on Facebook, Facebook Statistics. Available at http://www.facebakers.com/countries-with-facebook/order/user-grow/ (Accessed 18 September 2011).

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ALESSANDRO PRATESI

CHAPTER 12

PLEASE, JUST CALL US PARENTS

Engaging with inclusive approaches to researching marginalised communities

INTRODUCTION – DOING 'INCLUSIVE' RESEARCH ON INFORMAL CARE

This chapter reports on the complexities and rewards involved in engaging with inclusive and qualitative approaches to research, notably with marginalised communities. It draws on research conducted in Philadelphia (US), the aim of which was to build a phenomenology of *informal care*, that is, care work carried out at no pay by relatives or friends in private and non-professional settings. More specifically, the study explored the care experiences of 80 carers/parents living in the Philadelphia urban and suburban areas and diversified by gender, sexual orientation, marital status and type of care. One of the research's goals was gaining deeper insights into the mechanisms through which dynamics of inclusion or exclusion and social inequality are interactionally and situationally constructed and/or challenged. The study was based on the hypotheses that *emotions* are a key element in understanding such mechanisms, and that informal care is a strategic site to analyse them.

In order to understand the dynamics of inclusion/exclusion and the consequent outcomes of inequality that people produce while caring for others, I intertwined the conceptual categories of care, emotion, family, gender and sexual orientation. My assumption was that, in order to fully understand how the emotional dynamics revolving around care reproduce structural patterns of inequality, an attentive analysis must be able to proceed throughout and beyond gender and shed light on the invisible strings created by heteronormativity.[i] In other words, it must be able to show the actual variation within the socially constructed categories of gender and sexuality, and their complex interactions with the *lived* and *felt experience* of the phenomenon of care. My argument was that a careful investigation of the emotional dynamics involved in *doing care* provide important clues to grasp what Fenstermaker and West (2002) call *doing gender* – the interactional mechanisms by which difference and inequality are constantly reproduced

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I aimed to engage with more inclusive approaches to research, both from a theoretical and a methodological point of view. Gay/lesbian parents represent a crucial subject of study because, on the one hand, they can be viewed as *cultural entrepreneurs* and, on the other hand, they may inadvertently contribute to reproducing gender stereotypes and inequalities because sexual non-conformity does not guarantee non-conformity in terms of gender performances. Their inclusion was thus fundamental for several reasons: 1) gay/lesbian parents have been so far excluded from 'normal' research on informal care[ii]; 2) they are key subjects of study to visualize the crucial role of emotion in the reproduction of social inequality[iii]; 3) they are also crucial in understanding the link between agency and structure, between micro-situated (inter)action and macro-structural inequalities; 4) and finally, to reopen the discussion on both care and gender by means of a critical approach challenging heterosexuality as the norm. The intention was to avoid reproducing an ideologically tainted discourse on informal care and to widen the perspective on care by getting closer to its more complex nature.

The ways in which we shape our research is reflected *in* and *by* the ways we shape our realities and we construct the social world. By choosing a paradigm over another and by doing our theoretical and methodological choices, we do not only affect the research outcomes, but we also contribute to the construction of social reality (Berger & Luckmann, 1966). Our knowledge, our conception and our belief of what reality is, as well as the products of our research, become embedded in the institutional fabric of society. This is why it is important to ponder carefully our theoretical and methodological choices, because even without being aware of it, we can all contribute to constantly recreating dynamics of inclusion and exclusion.

In the next sections I first describe the methods and the research tools used in my study, and then address some of the main challenges and benefits of doing qualitative research with specific marginalized communities, in this case those who have been thus far excluded from the conceptual category of ‘normal’ carers and from ‘normal’ research on informal care: same-sex parents.

METHODS AND TOOLS

In my research I was interested in gaining deeper insights into the inner interactional mechanisms by which different kinds of carers reproduce inequality while *doing care*. My argument is that in *doing care*, people create forms of emotional stratification at the micro-level that can also affect their social positioning (status) at the macro-level. In order to shed light on the connections between the ‘private’, inner, emotional processes related to care and their ‘public’, social, structural outcomes, I needed methods of collection that could allow me to get as much and as diverse data as possible.

My data drew therefore on several instruments: semi-structured in-depth interviews, diaries, participant observation, online conversations with and between gay parents, key-informant interviews, and secondary sources about informal care and gay parenthood collected from adoption agencies, newspapers, and the web. In-depth interviews were the primary means of data collection, as they allowed participants to emphasize the subjective quality of their different care experiences, the contextual nature of knowledge, the social construction of the multiple meanings of care, and the interactive character of the status of caregivers. Although all the above-mentioned methods have been fundamental components of my critical interpretive inquiry, it is mostly through the thorough analysis of the interview transcripts and the use of a constant comparative method and analytic induction that I built my interpretation.

Both the *constant comparative method* and *analytic induction* are considered among the most appropriate methods for validating studies based largely on qualitative data. The comparative method means that the qualitative researcher proceeds through the continual comparisons within and across cases to test out a provisional hypothesis; and it also implies actively seeking out and addressing unpredicted data and cases that do not 'fit' immediately. Analytic induction refers to a systematic examination in qualitative analysis of similarities between various social phenomena to develop concepts or ideas; it is a way of building explanations by constructing and testing a set of causal links between events, actions etc. in one case and the iterative extension of this to further cases. "Analytic induction is equivalent to the statistical testing of quantitative associations to see if they are greater than might be expected at random (random error). However, in qualitative analysis … there is no random error variance. All exceptions are eliminated by revising hypotheses until the data fit. The result of this procedure is that statistical tests are actually unnecessary once the negative cases are removed" (Fielding & Fielding, 1986, p. 89, cited in Denzin, 2001, p. 237).

ANALYTICAL STRATEGY

Grounded theory (Glaser & Strauss, 1967) guided my method of data collection and interpretation. This inductive method requires a line-by-line analysis and constant comparison of data while searching for emerging themes and analytical categories. It entails further research into the meaning of the developing categories, by further sampling of appropriate participants or other data sources. Constant comparison and theoretical sampling are used to support the systematic discovery of theory from the data. Thus theory is developed from and grounded in the data and observations rather than generated in abstract ways, or a priori. As the researcher gathers data and investigates phenomena, core theoretical concepts are identified. Tentative linkages are developed between the theoretical core concepts and the data. This early phase of the research tends to be very open, and while laborious and time consuming, is also extremely productive. The subsequent phases of the research involve constant corroboration, comparison and summary. The goal is that of trying to converge toward one or a few core categories that are central. When does this process end? It never really ends, and could continue indefinitely. Essentially, the process ends when the researcher decides to and/or is forced to quit because of time and resource constraints.

The data analysis was mostly guided by what Denzin (2001) calls *interpretive interactionism* and some other scholars have called *interpretive phenomenological* *analysis* (Smith, 2004; Smith, Flowers, & Osborn, 1997; Smith, Jarman, & Osborn, 1999). By this term, Denzin refers to "the attempt to make problematic lived experience of ordinary people available to the reader. […] The research methods of this approach include performance texts, autoethnography, poetry, fiction, open-ended and creative interviewing, document analysis, semiotics, life history, life story, personal experience and self-construction, participant observation, and thick description. The term *interpretive interactionism*, as the above list of methods suggests, signifies an attempt to join traditional symbolic interactionist thought with critical forms of interpretive inquiry, including reflexive participant observation and postmodern and literary ethnography; feminist, cultural studies, and critical race theory; queer theory; naturalistic, constructivist, and case studies; poetics, life stories, and testimonios; creative and active interviewing; participatory action research; narrative semiotic, interpretive, and Foucauldian structural discourse analysis; and the interpretive, hermeneutic, phenomenological works of Heidegger and Gadamer" (Denzin, 2001, p. xi). This approach involves trying to understand the life experiences of individuals, how they make sense of them, and what meanings are attributed to them (Smith, 2004).

The qualitative approach described here is *phenomenological*, *interactionist*, and *interpretative* in that it views the analytical outcome as resulting from interactions between participants' accounts and the researcher's frameworks of meaning.[iv] One of the first analytical steps of this approach involves repeated reading of the transcripts, resulting in annotations concerning key concepts, general themes and common patterns. Once I had repeated this process with each transcript several times, I tried to connect the resulting set of themes with recurrent patterns across the transcripts to produce a final set of broader themes. The interpretive phenomenological analysis involves a high degree of subjectivity, as it is shaped by the researcher's interpretative frameworks. Nevertheless, the importance of the researcher's interpretation does not mean that traditional criteria for evaluating research quality (such as *validity* and *reliability*) are completely irrelevant in assessing qualitative research. For example, Silverman (2004) maintains that *reliability* can be improved by using standardized methods to write fieldnotes and analyze transcripts, and *validity* can be claimed by:

1. using different methods (e.g. observation, interview, and personal messages or personal correspondence) to see whether they corroborate one another;
2. constantly comparing all the data fragments that arise in a single case (the constant comparative method of Glaser and Strauss, 1967);
3. proceeding through analytic induction;
4. situating the sample and providing basic descriptive data (age, education, social class, income, gender, ethnicity);
5. grounding in examples to illustrate both the analytic procedures used in the study and the understanding developed in the light of them;

6. specifying the researcher's theoretical orientation and personal perspectives so that the reader can interpret the findings and consider possible alternatives;
7. organizing the findings together so that they can form a coherent narrative grounded on data, a map, a framework, or an underlying structure for the phenomenon analyzed;
8. accomplishing a general understanding of a phenomenon based on an appropriate range of instances while at the same time specifying the limitations of extending the findings to other contexts or participants (see Elliot, Fischer, & Rennie, 1999).

Even respecting the criteria described by Silverman as guarantees for assessing the validity and reliability of a qualitative research, *credibility*, rather than validity in the dogmatic sense in which it is often proposed, becomes the criterion to assess the persuasiveness of the analyses developed in this kind of qualitative work. The readers themselves are put in the condition of judging if the work has represented accurately the subject matter or clarified and expanded their appreciation and understanding of it, by means of the presentation of accurate, precise, and broad data.[v] With this kind of analysis – to paraphrase Becker (2001) – the researcher is not dealing with *validity* but rather with something else which seems as fundamental to him as validity does to others. In such an analytical context, the *social significance* of a relationship or a difference between groups becomes more relevant than the *statistical significance*,[vi] since statistically significant differences might be socially insignificant and socially significant differences might not be revealed by statistics (see also Epstein, 1997; James, 1997). In order to improve credibility, the researcher must specify his/her theoretical and methodological orientation as well as his/her social, intellectual and personal perspective.

REFLEXIVE ACCOUNTS

Situating oneself socially, epistemologically,[vii] and geographically is thus, at the same time, an important element of *credibility* and *reflexivity* (Archer, 2007; Doucet, 2008; Mauthner & Doucet, 2003), because it puts the reader in the position of judging how the researcher's location and subjectivity might affect any aspect of the research or interpretative process.

Reflexivity is a methodological norm or principle that urges us to explore the ways in which a researcher's involvement with a particular study influences, acts upon and informs such study. In other words, it requires an explicit acknowledgment and awareness of the researcher's contribution to the construction of meanings throughout the research process. Within the context of social sciences, reflexivity is therefore a research tool used to analyse personal, intersubjective and social processes which shape research projects. It enables researchers, particularly within the qualitative tradition, to acknowledge their role and the *situated nature* of their research.

No matter how aware and reflexive we are, there are influences that the researcher may be unaware of, or that require time, distance, and to an extent detachment from the research to be better identified and articulated. Nevertheless, if being aware of possible interferences does not eliminate them as problems, by disclosing our potential biases we can put the reader in a better position to weigh the *credibility* of the research accounts. In this respect, Mauthner and Doucet (2003) suggest that the researcher's attention to the *epistemological accountability*[viii] is far more important than a mere literal account of the multiple filters and forces potentially affecting our research.

THE IN-DEPTH INTERVIEW AS A SHORT MOVIE

The interview format is aimed at eliciting answers that might account for the implicit 'felt sense' of the participants' narratives, and it should be composite and articulated. The interviewing relationship is a research partnership between the researcher and the participant. It is a sort of implicit contract between them. Researcher and participant work together to produce information useful to the research project. The interview format should include several tools facilitating the collection of relevant information and at the same time helping to smooth the talk, making it more similar to a friendly and informal conversation. Whenever possible, interviews should be conducted in person, using a set of open-ended questions as initial probes on a wide variety of topics, which can then be explored using other instruments. Among the instruments I used for my research were:

- a drawing with two concentric circles to help the participants to describe their care networks;
- a scale (the *thermometer of feelings*) to help them to describe their emotions when *thinking* or *doing* care;
- a drawing with a staircase (the *existential ladder*) to facilitate the participants' narrative and visualization of their existential moves and progress;
- several photos portraying different kinds of care situations as a visual stimulation to additional reflections about the participants' care experiences.

The interviews took place in a variety of settings: participants' houses, participants' work places, coffee shops (only when this was unavoidable), my own office, and also my own apartment. Whatever the setting is, the interviews *must* always take place in a quiet environment, not only to avoid the noises for the tape recorder but also to create as relaxed a mood as possible. Whenever this is possible, then, the interview should be done individually, face-to-face, even when a couple is involved in the research. At the end of the interview, the participants were asked to fill out a brief background survey, which is always a useful tool to make sure to collect all relevant socio-demographic data (participants' age, gender, occupation, income, housing, etc.)

In-depth interviews focused systematically on the individuals' care experiences, including care work arrangements, the care network, the conciliation between work and care, the emotional and practical implications of care, the identity shifts involved in the care experiences, and the subjective evaluations of these experiences. Participants were encouraged to discuss their daily troubles and concerns, their thoughts, their feelings, and their narratives on their experiences of care. Conceptually, the interview was supposed to take a constructionist and interactionist perspective on the interviewing process and data. It was meant to be a form of interpretive practice where both participant (seen as storyteller or narrator) and researcher, working together, articulate ongoing interpretive structures, resources, and orientations through what Garfinkel (1967) called *practical reasoning*. In other words, although the interview had a clear structure, its gradations were constantly co-constructed in a context where expertise and substantive contingencies were blended together and the sense of the participant's experience was assembled each time using the interpretive resources at hand. The questions were not constantly formulated anew, but they were adjusted according to the most important emerging themes and the participants' ways of orienting these themes (Gubrium, 1989; Holstein & Gubrium, 1995).

The format of the interviews and the way they took place allowed for more than a simple in-depth account of the participants' experience of care. Reading the transcripts and going through them over and over again should be something more than a simple reading: it should be like watching a movie over and over again, and hence includes the visualization of the overall atmosphere, the kind of interaction between researcher and participant, the environment, the smiles, the laughs, the enthusiasms, the disappointments, the angers, the joys, and, sometimes, the tears. And if, for obvious reasons, all these elements retain a particularly vivid and detailed set of images and memories for the researcher, it should be possible for the reader as well to visualize most of those elements with a similar intensity by reading (sometimes long) verbatim excerpts of the transcriptions and the researcher's interpretation of them. The images will not be the same, since the reader can only imagine the situations, but the efficacy and strength of participants' direct accounts should not diminish. This difficult task can be facilitated when the interview format goes beyond a mere in-depth semi-structured interview, to include several creative tools. Some of them are exemplified below.

THE THERMOMETER OF FEELINGS

The use of the *thermometer of feelings*[ix] was valuable for at least two reasons: to stimulate rich discussions on the conflicting emotions revolving around care activities and to convey more information about topics that had not been previously raised or explored in depth. This exercise involved asking participants to scale their emotions related to their care responsibilities and activities. Participants were given a board with the drawing of a thermometer and twenty tags, representing twenty different emotional states, and then asked to locate the tags on a scale ranging from zero, for the lowest degree of the emotional state, to one hundred, for the highest. They were asked to arrange the twenty tags on the scale by thinking about their care activities and responsibilities. Ten tags corresponded to *positive emotional states* (ranging from happiness to gratification/fulfillment) while the other ten tags corresponded to *negative emotional states* (ranging from isolation/ exclusion to depression).

The participants had total freedom in positioning their tags, using multiples of ten, five, or even less on the scale, and they could also change the position if they had a second thought. While they were locating the different tags, they were supposed to comment and explain the reasons for their choices. The thermometer of feelings is a *standard measure of affect* more reliable and valid, according to several scholars than 5 or 7-category ratings scales, because rating scales with more response categories transmits a greater amount of information and are therefore inherently more precise in their measurement (Alwin, 1997; Marradi, 1998, 2007). In my study I was not interested in claiming any sort of statistical relevance of the data from this instrument, and hence the instrument enabled me to obtain incredibly rich and detailed information from the participants and to grasp important insights into their emotional dynamics and rationales.

THE EXISTENTIAL LADDER

With the instrument I called the *existential ladder* I asked participants to describe their present situation (in terms of maturity, quality of life, personal growth, achievements, affective life, family care, creativity, gratification, status, salary, career, contributions to the wider society, etc.), and to detail the steps of their past, present, and future social positioning. By showing them the drawing of the existential ladder (a simple set of steps), I asked them to describe what represented, for them, the several steps. I then probed to understand if they thought there was a gap between their occupational and existential careers and/or if in the past there were alternative paths they had to renounce because of their care responsibilities. The relevance of this question is related to the fact that it allows participants to present a diachronic picture of their biographical paths and not only an immediate snapshot of their present situation; in other words, it allows important insights into the dynamics of their social mobility.

THE IMAGES OF CARE

Photo elicitation was another fundamental component of the in-depth interview. Photo elicitation allows the researcher to access a deeper level of meaning; with a photo the informants interpret (or re-interpret) the meaning of these visual statements, becoming the *cultural specialists*. There are several studies on visual sociology (Becker, 1995; Harper, 2002). Visual methods are discussed further in this text (see the next chapter). Some of the methodological implications for the visual study of social life are illustrated in a study on the impact of first-born children on the family dynamics in Switzerland (Steiger, 1995). In the photo elicitation interview, the participants choose a series of thematic pictures that best illustrate their *feelings*. With photo elicitation the subjects are often more straightforward about the details of their everyday lives. The participants were asked to select and to interpret some pictures – photos concerning different kinds of care-related situations. They were invited to have a look at, freely choose, and comment on some of the photos, either because they reminded them of something familiar, described some of the situations they had experienced while doing care, or, more simply, were suggestive of something – a mood, a memory, an idea, an anecdote and so forth. Showing the participants these pictures was like presenting them with a series of visual statements, which were read and reinterpreted according to the participants' subjectivities and experiential lives.

At the end of the process, there are different meanings, or dimensions, in the photographs: the definition by the participants as they select the photos that they feel represent most closely the feelings/the emotional states connected to the phenomenon being studied, and the elements in the pictures that retain their own meanings, aside from the participants' subjective descriptions or interpretations. Through photographs, meanings became much more complex, and at times even contradictory. But the end result is a multi-layered visual ethnographic understanding.

COMPUTER-ASSISTED DATA ANALYSIS

The study also made use of N-VIVO, one of the computer software for the analysis of qualitative data. This software proves to be valuable by allowing for subtle coding of rich text records and by facilitating the management of vast amounts of data: textual, visual and audio data (http://www.qsrinternational.com/). On the other hand, coding and entering all the data is extremely time-consuming. The emerging themes or 'nodes'[x] should be used as guidelines to illustrate both the interpretation of the results and the grounding of our hypotheses. The *noding* process produced sometimes hundreds of pages, which needed to be further filtered and organized; but it also allowed me to get an immediate sense of the relevance of each node.

Some of the nodes I formulated in my research on informal care (such as the participants' subjective definition of family, the balance between work/career and care, the meanings of care, the draining or energizing aspects of care, gains and losses, the existential ladder, the status inclusion or exclusion, etc.) were directly addressed in the interview structure; some others (such as 'being old/sick', 'being gay', 'care as a choice', 'the divide between caregivers and non-caregivers', 'care as an alibi', 'happy to be out of the rat race', 'non asking/not relying on other people', 'the productivity of care', 'the global/universal experience of care', etc.) emerged instead from the participants' answers.

Sometimes a statement/a quote can fit into multiple nodes and some of the nodes can be more intertwined than others. This makes the analysis more complex, but it also allows the building of conceptual filters that are neither too loose nor too narrow. Through such conceptual filters the researcher can recuperate important passages that could otherwise be lost. The analysis can never be exhaustive, also because the potentialities of N-VIVO are vast. Nevertheless, the analytical process allowed by N-VIVO is considerably rich in terms of prospective developments and certainly worthy of being pursued.

THE DIARY

Time sampling diary (TSD, also called Time Sampling) is a research technique designed to access representative sample of people's subjective experiences, especially emotions and motivations, as they go about their daily activities (Brandstätter, 2001). Research participants are asked to record their subjective experiences at randomly selected times, typically several times a day for about 30 consecutive days. The technique was first reported by the Austrian psychologist Hermann Brandstätter in 1976, although the British psychologist and psychoanalyst John Carl Flugel had already published[xi] a study without random sampling in which participants retrospectively and as often as possible, recorded, over a period of 30 consecutive days, their emotions during the past hour or so.

In my study, participants were interviewed and then asked to fill in a diary that spanned three weeks. The diary focused on the participants' attention to their feelings in the moments of self-observations. It covers a 24 hour period for two days in three to four subsequent weeks. The participants are asked to select at random the days for the compilation. Each day has two to three random times of observations. This is how the diary works: the participants' feelings are described as they manifest themselves in concrete situational contexts characterized by type of care activity, time, place, other activities, resources/constraints, and persons present. Therefore, the data are about what a person does and experiences in a randomly chosen time and place and in immediately responsive interactions with someone else (see Brandstätter, 2001; Katz, 1999). By assuming the participants' viewpoint, the diary permits the researcher to avoid tacitly defining the symbolic meanings and the emotional implications of the phenomenon being studied.

DOING QUALITATIVE RESEARCH WITH MARGINALISED COMMUNITIES: CHALLENGES, PITFALLS, AND BENEFITS

The research presented in this chapter is an example of a qualitative, inclusive approach to studying marginalised communities. The interpretive phenomenological analysis illustrated here is a complex, time-consuming, and labor-intensive process. It requires the researcher to acknowledge the complexities and ambiguities of the participants' narratives as well as to come to terms with the necessity of presenting their accounts in a form that is clear and exhaustive. Since we do not rely upon statistical tests to verify whether a pattern or a relationship between variables is significant, we have to make carefully considered judgments about what themes, patterns, and categories represent truly relevant information to analyze these narratives. The insights we manage to get on any phenomenon, should be viewed within context and their limitations acknowledged and where possible articulated. Producing readable linear narratives out of complex social realities is one of the problems shared by all qualitative researches. In the end, all qualitative works contain "some mix of careful planning, serendipity, blunder, and idiosyncratic predilections" (Leidner, 1993, p. 233).

As a consequence, we must be aware that what we might 'discover' is shaped by us, that it is not 'the only truth' that could be gathered from the participants, and that the research methods require an ongoing reflexive attention, the end products of which are not flawless. But equally, we should engage ourselves in designing approaches where what we construct cannot be seen as arbitrary, or as the only story of participants involved in the research, but rather as a *valid start* to question more conventional interpretations, and expand our present understanding of a phenomenon. The nature of certain phenomena we want to explore is too complex for any statistical elaboration or any preplanned script to fit all calls. In-depth semi-structured interviews can be the most reliable starting point to yield rich, extensive, and valid data. These kinds of interviews can produce insights into topics we would never consider inquiring otherwise. A full ethnographic immersion in the phenomenon/subject of study and the integration of the in-depth interview with other qualitative tools, like the ones we mentioned, should add the rest.

We need to do open the door to people's knowledge at the micro level, by listening to their voices, narratives, experiences, perspectives, and trying to grasp their own constructions of the possible meanings of the subject of study. We want to conduct a study that can be grounded directly in the lived experiences of the participants and that can speak directly in the voices of those who live such experiences from different perspectives, which often means with different emotional, cognitive and social outcomes. Considering the participants as the real 'experts' of the topics we are interested in, stepping back, and submitting ourselves to the material instead of trying to impose our voice, provides additional direction and validity to these kinds of qualitative approaches and allows the data to ultimately speak and supply the answers.

The *credibility* of our findings can be solidly grounded both in the participants' local, contextual and authentic experience of the phenomenon studied and in the multiple methods and tools we use. I would also argue that an excessive emphasis on *techniques* of data collection and analysis is perhaps misplaced in qualitative studies precisely because the meaningfulness and potential contribution of such studies lie in acts of interpretation, convincing reconceptualization of a phenomenon, and dialogue within and across fields and disciplines. Besides, as Judith Stacey and Timothy Bilbarz (2001) among others remark, if we were to accept radical criticisms of this kind of qualitative studies we would have to dismiss virtually the entire discipline of psychology as well as all those prominent qualitative sociological works and publications based on small samples of participants.

Whatever the level of persuasiveness or credibility the readers attach to our work, these kinds of qualitative, inclusive approaches can unquestionably help us to experience what Denzin calls "dialogic relationships with the [moral] community" we all belong to, as social researchers (2001b, p. 43). These relationships, in turn, allow us to experience what a phenomenon might truly involve if freed from its cultural scripts and lived in the entirety of its moral and political implications: in a sort of ideal *democracy of feelings* in which individuals posses equal emotional rights and duties, or better, responsibilities. What we can learn from these approaches goes far beyond the research context itself and can help us to understand much more about a phenomenon than any other direct experience or scholarly article we read.

INVOLVEMENT OR DETACHMENT: CONCLUDING REMARKS

A last note about the *emotional labor* the interview involves for both the participant and the researcher. Emotions observed and lived within the interview are, themselves, important data, although difficult to convey (Hoffmann, 2007). As Hochschild maintains (1983), a researcher's emotional reactions are as important as other sensory data points, such as visual or auditory reactions, and participants' emotional dynamics during the interview, are as real and important as any other product of the interview. This was particularly true for the work I used in this chapter as an example of a qualitative and inclusive approach, and whose focus on emotions was a crucial component of the entire research project. The emotional labor I was engaged in during the interview process was far more rewarding than my subsequent attempt to communicate it to the reader through my interpretative accounts.

In the course of the interview, I played several roles ranging from the 'foreign-researcher-who-has-to-be-helped' role to a 'therapist' role, as the participants described situations that were emotionally difficult to them. At most times I was simply a trustworthy listener. Given the highly emotional nature of the research topics, sudden emotional outbursts were not uncommon among the participants, and when this happened I had to decide how much to share and show or rather mask and screen off my own emotions in order to avoid negatively affecting the interview while, at the same time, giving the participant the impression that I was not there just as a cold-hearted and insensitive researcher.

As several scholars maintain, if the participants are to be encouraged to abandon any filtering and emotional labor in order to freely express their emotions, the interviewer, beyond his/her being adequately gentle and sensitive, should avoid any excessive emotional involvement during the interview (Holstein & Gubrium, 1995). Of course, there were situations where *not* sharing or *not* showing empathy for the participants' emotions would have had a negative impact on the interview as much as sharing would have in others. There were situations in which I tried to make my own reactions to what the participant was telling me as unobtrusive as possible and other situations in which the conversation became quite emotional for me as well or, at least, I felt compelled to interrupt the interview and turn off the tape recorder for a few minutes to respect the participant's sensibility. And there were also circumstances – numerous ones – in which contagious laughing prevailed.

Whatever degree my emotional *involvement* or *detachment* reached (Elias, 1983/1987), I was always genuinely engaged and interested in what the participants were saying, and this was not a difficult task for me to accomplish. In the majority of cases, the participants looked comfortable and confident about my professional honesty, even during the most emotionally intense passages of our conversations, and did not want me to interrupt the interview or turn the tape off even when they could not hold back their tears. Most of them, eventually, told me they had enjoyed the interview and its emotional implications.

One of the best compliments a researcher can receive is when the participant tells him/her that the interview was *a useful occasion* to reflect on issues that would have otherwise been neglected. Such a compliment became, for me, an effective way to make up for the enormous sense of debt and gratitude I felt toward all of my participants, particularly when they are as generous as those I had the chance to meet. And I would like to close this section with the words of Simon, one of the carers/fathers I met during my long phenomenological journey around informal care. Simon's care experience, although "stuffed with tons of things to bear", is definitely a successful one, one of the numerous examples of emotionally empowering care experiences, which pushes him to affirm that the foundation for most of the issues he considers most important to his life is "very much in place". Considering the richness of the material of which we tend to dispose with qualitative research and the harsh selection we are often forced to make because of time and resource constraints, we can never be sure whether the foundation for most of the things that we consider most important to account for in our researches is "very much in place" as well.

Similarly to Simon, almost all the participants I met told me that our meetings had been for them an important occasion to reflect on their daily challenges, their long-term existential trajectories, and above all, their challenging experiences as carers, making them more conscious of their roles, but also of the importance that care had in their lives. Most of them told me that the interview experience was an opportunity to give voice to unexpected emotions, of which they were not fully aware, and to shed light on issues that they would have never thought about otherwise. Considering that we all should think of our researches as a starting rather than a closing point, such positive feedback from the participants should already represent an important result, and also an additional evidence that those issues lie at the very core of the phenomena we are trying to understand.

> Simon: Okay. Well, this interview has made me, I don't know, has encouraged me to think about some of these questions in a way that I hadn't in a long time.
>
> I: This is a compliment …
>
> Simon: Absolutely, absolutely. Maybe part of being a father and being so, you know, having such immediate, I don't know, so many immediate things in my life that I haven't felt the need to sort of step back and reflect existentially as much as I used to. Because I did, I used to, for sure. I very much see myself, for better or worse, sort of, you know, "*nel mezzo del cammin di nostra vita*" (in the middle of my life path)[xii] right now, I really do.
>
> I: … but not "in una selva oscura" (*But not in a dark forest*) I hope …
>
> Simon: No, no, no, no, no, just a little stuffed with tons of things to bear. I think that I'm very, I think I'm right in the middle. And I think I'm very satisfied because the

> foundation for most of the things that I think are most important to my life is very much in place.

NOTES

[i] Heteronormativity is the assumption that heterosexuality and heterosexual norms are universal or at least the only acceptable conditions. It is the cultural bias in favor of opposite-sex relationships and against same-sex relationships of a sexual nature. Because the former are viewed as 'normal' and the latter are not, lesbian and gay relationships are subject to a heteronormative bias.

[ii] When included, they have been taken into account only in a *comparative* perspective: to focus on the differences between gay and straight parents or carers, rather than in an *inclusive* perspective. Besides, no studies have considered how and under what conditions the parent's sexual orientation can produce dynamics of inclusion/ exclusion based on the *emotionally felt* and *lived* experience of care.

[iii] A few studies have addressed issues connecting the economic and emotional resources and well-being of gay and lesbian parents or couples with their openness about sexual orientation, their being in couple rather than single, and their emotional support from family and friends. Yet, they all limit their analyses to an assessment of psychological health or pathological stress, without connecting the different emotional outcomes with the theme of inequality.

[iv] The approach is phenomenological in the sense that it is broadly concerned with individuals' personal perceptions or accounts of an object or event as opposed to an attempt to produce an objective statement of the object or event itself. Phenomenology is a school of thought that emphasizes a focus on people's subjective experiences and interpretations of the world.

[v] Here I use the word broadly "in the sense of being based on knowledge about a wide range of matters that impinge on the question under study, rather than just relatively few variables" (Becker, 2001, p. 328).

[vi] Statistical significance is a mathematical tool used to determine whether the outcome of an experiment or observation is the result of a relationship between specific factors or due to chance.

[vii] Epistemology is the branch of philosophy concerned with the study of knowledge. It refers to the ways we acquire knowledge: how we know what we know. Ontology is the theory of the nature of being and existence, i.e., the study of the nature of being and existence. It refers to the assumptions we make about what kinds of things do or can exist in a specific domain, and what might be their conditions of existence, relations of dependency, and so on.

[viii] Being as explicit as possible about the epistemological conceptions that inform our research practices and making these conceptions as transparent as possible.

[ix] A revised/personalised version of the author of a scale that has been used in research since the beginnings of modern survey research as an accepted way to ascertain individual feelings in a multitude of settings.

[x] 'Nodes' in N-VIVO language are *conceptual containers* referring to a specific topic.

[xi] In an article published in the *British Journal of Psychology* in 1925.

[xii] To express his feeling himself in the middle of his life trajectory, the respondent quotes here the famous incipit from Dante's epic poem *Commedia*, Canto I: "Nel mezzo del cammin di nostra vita, mi ritrovai per una selva oscura, ché la diritta via era smarrita" (which means: *In the middle of the journey of our life, I came to myself in a dark forest, the straightforward way misplaced*). In the Divine Comedy (*Divina Commedia*), Dante narrates the story of his metaphorical journey out of the dark forest where he found himself, lost, in the middle of his life.

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ANNE KELLOCK

CHAPTER 13

NEW FRONTIERS IN RESEARCH

Using visual methods with marginalised communities

INTRODUCTION

This chapter outlines the potential of utilising visual methodology with marginalised communities. Before discussing the concepts of appropriate methodologies with such communities, first there is an exploration as to what the notions of inclusive communities and marginalised groups are. To illustrate some of the benefits and complexities in engaging with visual methodologies, this chapter draws upon research conducted with Maori children in New Zealand.

Marginalised groups essentially conjure an image of people *without voice*; whose values and desires are unheard and; whose rights as human beings are often ignored or not adequately attended to. Such populations may include among others, children; the elderly; women; disabled people; those living in poverty; ethnic minorities and indigenous populations; those confined by political and religious repression. The list is extensive and indeed reflects that on a global level, this covers a large proportion of the population.

Bearing in mind the vast range of people who may be considered to be part of a marginalised community or group, the shared experience of such people, appears to be that they are less able to lead a life they are entitled to. They may not be able to access sufficient resources to experience a just life or have their own values and opinions recognised in an appropriate or sufficient manner for them to be equal human beings. The above list incorporates wide groups of people that in isolation may have built their own communities and some may seem to have access to resources but the fact remains that their human rights are often compromised.

In contrast, the inclusive community provides all members with the opportunity to fulfil potential regardless of disability, sexuality, ethnicity, class, gender or age. This is embraced through the social, physical and cultural environment, where differences are acknowledged and valued (Gunn et al., 2004). Members of the community are able to take an active role, have a sense of belonging, have their voices heard and build shared understandings between one another. Equal rights,

A. Azzopardi and S. Grech (eds.), Inclusive Communities: A Critical Reader, 199–214.

feelings of respect, being valued and having positive relationships are experienced. Participation is practiced whereby members of the community are able to make their own decisions and choices about matters that affect them. The concept may seem ‘utopian’ yet if equality of life and human rights are to be fairly respected universally, then it should be seen as an expectation.

BACKGROUND

To illustrate the use of visual methodology with marginalised groups, a research programme involving mainly Māori children (aged 8-10 years old) in New Zealand will be drawn upon. The children discussed in this chapter lived in a small village on the outskirts of Auckland, New Zealand as part of a wider research project also based in England. The research explored the well-being[i] of primary school children from their own perspective utilising visual methods in combination with participative and indigenous methods.

New Zealand has a very small population of just under 4,300,000 (Statistics New Zealand, 2008). According to the 2006 Census, approximately a quarter of those people live in the Auckland region, the largest population within the whole of New Zealand (Statistics New Zealand, 2008). The particular village where the school is located has a population of 2,500, 31% of whom are Māori and 12% Pacific Island Peoples, this is different to the rest of New Zealand where 15% of the population are Māori and 7% Pacific Island Peoples. Current census statistics also reveal that 60% of the Māori population is under the age of 25 (Waikato University, 2008).

The United Nations Children’s Fund (UNICEF, 2007) examined children’s well-being in rich countries around areas of material well-being, health and safety, education, structure of family and relationships, behaviour and risks and health. Within this report, New Zealand demonstrates child poverty above 15% contrasting sharply with less than 5% in four Nordic countries (Sweden, Norway, Finland and Denmark). The report links such statistics with, for example, the likelihood of poor health, learning and behavioural difficulties and underachievement at school. In fact, in New Zealand 16% of children are living in households where the income is less than 50% of the national median (UNICEF, 2007).

METHODOLOGICAL APPROACHES WITH MARGINALISED COMMUNITIES

The interpretive perspective enables knowledge to be formed through building understanding from the individuals concerned within a research project and through sharing subjective experiences (Burrell & Morgan, 1979). Qualitative approaches allow stories to be told from participants’ viewpoints, building a more holistic and possibly honest reflection of their lives. Christensen and Prout (2002) and Aubrey and Dahl (2006) consider that children are experts in their own lives and as such, should be an integral aspect of the research process. Without accessing the views and opinions of participants, a substantial part of data would be missing. There are several tools that have been utilised to access participants’ experiences such as focus groups, interviews and questionnaires. Such research methods may provide detailed understandings yet at times they can also be barriers to participants through a lack of shared language and rigid structures.

An ethnographic approach can facilitate a deeper understanding of the phenomenon being studied, whereby the researcher immerses him/herself within a community or cultural grouping. Through building an understanding from being involved in a community, combined with interviews and discussions with participants, and observation, it is felt that this approach may allow for an in-depth picture of life in more ‘natural’ settings.

In deciding which methodological approach would best suit the research discussed here, many considerations were taken into account. Working with young children requires an accessible research method that is both engaging and appropriate. A qualitative stance was adopted engaging with the participants as active partners to tell their own visual stories. By working with a small number of children (six), a wealth of data was generated, the aim of which was not generalisation, but instead an insight into the lives of the specific children within their particular contexts. It was felt that the use of visual methods, in particular, the use of photography as the main research tool, would be of benefit in this project. The next section will examine aspects of visual and participative methodologies as well as considering indigenous methodology. Following this, there is an understanding of how this was developed in contemplation of working with children in the school setting.

VISUAL METHODOLOGY

The visual image is familiar and is all around us. The camera and photography are common resources in today’s society and Lynn and Lea (2005) assert that in fact we are living in a world where the visual dominates. The photograph can be a precious artefact with emotional attachments, linking to memories and stories of our pasts (Berman, 1993). Indeed, the access to photography has never been so prevalent with a range of types of cameras available including mobile phone cameras and the use of the internet for sharing images. This familiarity can enable participants to feel comfortable and in control with the research tools offered.

Visual research methodologies can offer an alternative way of communicating knowledge. At times, it can be difficult to communicate verbally, whether through language barriers, through a lack of adequate words to successfully communicate what is thought, or not yet having the skills to transfer knowledge and understanding into words. As Haley (2008) stated, “language gets in the way of knowledge and understanding”. Through communicating visually, new meanings may become apparent.

The significant exclusion of visual methods and data in qualitative research in recent years is noted by Harrison (2002); Piper and Frankham (2007), and Reavey and Johnson (2008). However, increasingly popular in the fields of human geography, social anthropology and sociology, the ability of visual language to communicate sense of identity and sense of place is not to be underestimated.

Images portray a depth of information and allow participants to 'speak' in ways perhaps not otherwise possible, delivering agency to those less often heard in the research setting, such as children (Bolton, Pole, & Mizen, 2001; Reavey & Johnson, 2008).

The use of visuals in research has evolved over the past thirty years or so, photo interviewing, for example, became popular in the 1970s. Photographs were shown to participants to stimulate discussions. In the 1990s, came the development of 'photo voice' (Wang et al., 1998) enabling participants to take their own photographs to tell stories about their experiences. This approach is commended for building agency and shared understandings and is often practiced in marginalised communities.

Temple and McVittie (2005, p. 227) and Rose (2007) consider that the use of visual methodologies has the potential to enrich psychological understanding of human experience. Indeed, Harrison (2002) states that the potential expression of visual presentation enables broader social insights to be explored (p. 857). In intertwining the visual and the narrative it is believed that a richer, deeper comprehension may be gained. Rose (2007) also states that photographs taken by participants are unique sources of evidence in social research. Knowles and Sweetman (2004) also indicate that photographs have greater potential than other methods using speech and writing, not relying solely on verbal communication.

Rose (2007) also writes about the positive uses of photographs in visual research and in particular, those taken by participants whose images are used in the research process in addition to say, interviews. She considers that photography is more accessible to participants than film making due to its accessibility and ease of use. Also, she affirms that photography is more popular with participants than film making. This ease of use, offered a quick and simple method of gathering data, appropriate for the children involved in the present study.

Whilst much is thought of the value of the photograph in research and its multiplicity, Rose (2007) highlights its worth in support of research and the potential to develop findings and supplement understanding, yet standing alone, the photograph does not tell the entire story in research and still requires contextualisation by word to an extent. The contextualisation of the photograph is essential; this in turn can allow participants to come to terms with their identities through their own control of the camera (Harrison, 2002). In addition to being a set of data or evidence, photographs have a further impact in that they also allow for reflection on daily lives and activities possibly not given much consideration or taken for granted (Blinn and Harrist, 1991; Holliday, 2004; Latham, 2003). The insight and reflection are particularly stimulated through discussions with participants around their collection of images.

As well as considering that the photograph requires supporting narrative, Piper and Frankham (2007) also state that it is important to understand the photograph through what is missing. The meaning of the photograph comes about through explicitly examining not only what is in the photograph but what is outside of the frame, i.e. around the photograph (p. 384). It is possible to interpret a photograph in many different ways yet it is the photographer's voice that is important so that the narrative and image may work together to tell the story.

Visual methodology has been criticised for potentially being 'ambiguous' (Penn, 2000) and its validity questionable due to difficulties surrounding linking images to participants' narratives (Lynn & Lea, 2005). Certainly, visual data raises questions of validity and interpretation (Reavey and Johnson, 2008) but it allows rich comprehension of social and psychological phenomena through '*multi-modal*' forms of communication.

Within the research discussed here, there have been many benefits to the use of visual methodology with the children involved. Their visual communication enabled them to feel heard and their stories valued, thus enhancing the participants' self-esteem. Further, the ability to take control of their visual stories allowed the majority of the children to experience greater confidence that also developed into wider aspects of their school lives that was noted by themselves as well as peers and adults in the school.

PARTICIPATORY ACTION RESEARCH

This section explores the various aspects of participatory action research that were employed in this research. Whilst the term participatory action research is being used here, it is to be considered as 'part'-participatory action research due to the nature of participation. The children involved took part ownership of the process but due to their age it was felt that a researcher driven element was still required to follow a rough format to cover the ground necessary to collect appropriate data for the study (see next chapter in this collection by Goodley and Runswick-Cole).

Kagan, Burton and Siddiquee (2008, p. 32) deliver a concise definition of action research as one that is "… grounded in experience, combining understanding or development of theory with action and reflection …". This kind of research can operate on multiple levels, such as individual, group or societal and is considered to be an iterative and cyclical process, as will be explained further on. Action research also lends itself to cross-disciplinary approaches.

In working alongside participants and developing a rich understanding through the practice carried out, Reason and Bradbury (2001, p. 1) describe action research as a practice that is developed in the pursuit of worthwhile human purposes. It is believed here that through the participatory nature, knowledge is developed not only for the purpose of research but for the benefit of the participants through their active engagement throughout and for a valuable goal.

Grønhaug and Olson (1999) acknowledge that action research can be criticised as an indeterminate method; yet there is a depth of value that is immeasurable in discovering meaning (Reason & Hawkins, 1988). Grønhaug and Olson further describe action research as a journey of changes and improvements that are constructed and implemented on behalf of, and often in close cooperation with, the participant. Through an experiential enquiry, a dialogue between the researcher and the participant is developed, enabling a realisation of the practical needs of individuals (Reason, 1988). As such, practical solutions may be identified (Reason & Bradbury, 2001).

Through the range of activities within this present research such as discussion, drawing, photography and reflection, it is intended that increased communications are created and other languages and voices of communication will become transparent through the photography and art work that is produced. Reason (1988) discusses the meaning attached to the different forms of language created that should be studied in their own media without further dialogue.

As part of an action research style project, the participants will be engaged throughout and will be asked to provide feedback on the whole process at each stage. Reason (1988) refers to the usefulness of taking time to reflect at each stage of the process in order to make sense and make appropriate combined decisions as to what to do next. It is also essential to maintain the knowledge that action research is context bound (Kagan et al., 2008) and therefore in this context, the children and the researcher make decisions regarding practical activities undertaken and share opinions on photographs taken as a group.

Some of the benefits attached to using an action research model are described by White (2004) who acknowledges advantages to participants on a range of levels, including sense of empowerment and increased confidence. One such positive aspect that he discussed was the value of using participants' anecdotal evidence as valid data in research findings. This collaboration and reflexiveness enables deeper understanding when searching for meaning. It is the intention that the participants gain not only from being part of the research, but also from taking part and contributing to it throughout (White, 2004). It is considered that the participants' input to be extremely valuable in terms of what they are experiencing and receiving from the processes involved.

Kagan et al. (2008) describe the work involved in action research as cyclical. The first stage in the research is the plan; this is also referred to by Swepson (1995) as identifying a need. The following stage is that of 'action' – the taking of the photographs to be worked with and using them for further art work and discussion. Following this, there is time to observe the work created so far, before the final stage of the cycle: reflection. The whole cycle is collaborative, and the participants are engaged and consulted at all times during the process.

Within action research it is also worthy to note that the process is equally important to the end result through its participative and evolving nature. Kagan et al. (2008, p. 37) draw attention to how knowledge is thought of and in the case of action research, the process of inquiry and reporting of findings are to be considered as well as the findings themselves. Action research is a *process* (Montero, 2000) and the research is to be examined from the beginning stages through to the end result, including the various cycles involved as described above.

Due to the nature of action research and how participants play a significant role in the development of the initial plan and consequent action, it is not always possible to describe in advance how the process may evolve (Kagan et al., 2008). Within this study, the method is described as a fait accompli, however, it is one that has changed and evolved during the project. The changes involved included addressing the needs of individual children to work in smaller groups to assist with technical aspects of the project; reconsidering the time during the school day to work with the children to be more appropriate and adjust the frequency of workshops and; the type of equipment used following children's feedback from the pilot study. This also reflects the flexibility required when working in an action research framework along with considerable reflection throughout.

INDIGENOUS METHODOLOGY

There is some interesting work regarding indigenous methodology written by Tuhiwai Smith (1999) in her book *Decolonizing Methodologies*. She explains the historic background to research with indigenous people, in particular the Māoris and their ill-feeling towards research and researchers. This is based on the early methods (dating back to the arrival of Captain Cook in New Zealand) of drawing and describing the Māori people as *savages,* through various and often unethical observations, as Tuhiwai Smith reports research as "open cast mining" – see, take and destroy (p. 118).

In the early 1900s a new wave of research hit New Zealand involving interviews and improved communication with the Māori people. Research began with the *karakia*, the Māori prayer, to protect sacred things discussed during conversations. Following activist activity in the 1970s, greater recognition was given to the Treaty of Waitangi along with the introduction of the Māori language (Te Reo Māori) into schools. Since that time, researchers, including indigenous researchers, have begun to address social and bicultural issues (Tuhiwai Smith, 1999) and ethical implications for children (Tuhiwai Smith, 1991).

However, despite the changes recognised by Tuhiwai Smith, unethical ways of working were also highlighted by Bird and Drewery (2000, p. 18) where they report how Māori children were involved in research in the 1950s and 1960s without their cultural background being taken into account. Māori children were removed from their whānau (extended family) to be 'tested' by Pakeha researchers in questionable ethical circumstances (Bird & Drewery, 2000). Indeed, Bronfenbrenner visited New Zealand in 1979 (Bird & Drewery, 2000) and considered that the experimental laboratory style studies of children only demonstrated "strange behaviour of children in strange situations with strange adults" (Bronfenbrenner, 1979, p. 513). During the same visit, Bronfenbrenner highlighted the importance of research, in particular, research of human development, to be carried out in real-life settings (Bird & Drewery, p. 19).

Methods in indigenous research often include mixed approaches and Tuhiwai Smith (1999) offers a whole host of twenty five different methods employed in indigenous research. Such methods include storytelling and remembering; intervening (action research); representing through poetry, art and film making; reframing and; envisioning. Storytelling is described further by Bishop (1996) who refers to the storyteller maintaining control of their own story through a method that is culturally appropriate or familiar.

CRITICAL ISSUES SURROUNDING RESEARCH WITH MARGINALISED POPULATIONS

In contemplating how to approach research with marginalised populations, several issues have already come to light in this chapter. Ideally, research should be accessible; culturally and contextually appropriate; conducted within surroundings familiar to the participants; ethically sound; and offering the potential to change lives (that is transformative) in a positive manner. The methodological approaches outlined, can facilitate such practices. Through enabling participants to actively take part in the research process in a manner which is meaningful to them there is a potential to build mutual understandings and respect, as experienced within inclusive communities.

Within the present research project, it was firstly important to carry out the research in a familiar and comfortable location for the children (Mayall, 2000). In addition to this, Mayall considers that children work well with a partner or in a small, familiar group to enable them to feel more relaxed and confident. This permits the formation of conversations that allow them to continue from each other's comments, confirming ideas and opinions suggested by their peers in a supportive environment.

It is felt that building a trusting relationship, is conducive to a more productive research relationship (Banister & Booth, 2005). Indeed, it is further considered that it is more beneficial if the researcher has previous experience of working with children. One reason would be a working knowledge or insight into children's behaviour in the school environment. Furthermore, to be accustomed with children's current language is a further benefit to enable a "shared language" (Banister & Booth, p. 164) allowing researchers to explain to children in terms they will comprehend, and indeed, the other way around.

Haddon, Goodman, Park and Cruik (2005) undertook a qualitative study using questionnaires with primary school children to comprehend emotions in children and adults within the social context of the school. Whilst appropriate activities such as draw and write and circle time were used, the younger children did experience difficulties with questionnaires and this hindered part of the enquiry. This highlights the importance of using suitable research tools and approaches when working with children. In light of this, the following section addresses the particular methods adopted in this research programme.

As well as taking into account how to work with children in a research programme, it is also important to think about how children are understood. Traditionally children have been understood through the work of mainly Western theorists who do not fully consider child development on a more global level. Bird and Drewery (2003) are particularly interested in Antipodean perspectives including the influence of Māori culture on development and consider that this cannot be ignored in contemplating child development. For example, the use of metaphor in the Māori language is frequently used. As such, metaphor can be a useful way in providing explanatory aspects of knowledge and this can be built into the research process. In using a social constructionist (constructing meaning from the specific context) and inter-disciplinary approach that encompasses the bicultural experiences of children in New Zealand, as well as Australia, Bird and Drewery consider that a more appropriate theory of understanding children may be realised.

The manner in which Bird and Drewery (2003) draw upon the cultural influence of the Māori on development is very in-keeping with Māori way of life. Bird and Drewery devised a framework utilising the metaphor of the New Zealand flax (used for weaving), known in Māori as *harakeke*. The weaving metaphor enables a holistic framework including perceptual and cognitive, emotional and affective as well as physiological and behavioural issues (p. 4). The approach also incorporates the voices of those addressed as well as considering cultural, historical and social grounding; allowing for positive and negative interpretation of the life-span experience.

METHODS AND DATA

There were various activities that the children participated in towards discovering how they considered their own well-being. These included a 'Tour of the School' where the children roamed around their school to take photographs. Further, a 'Feelings Dictionary' was made where the children acted out different feelings and emotions in freeze frame photography, matching the photographs to different experiences at school. Follow-up discussions on the activities were recorded on a dictaphone. It is felt that all of the activities were engaging and age-appropriate for those involved in the research project. These activities and others shall now be discussed in turn with some illustrative examples of images from the research.

The 'Tour of the School' activity has been inspired by Sixsmith et al. (2004) and their 'experiential walk' that involved children leading researchers around their school and verbally narrating various aspects of school life. In the present research, the children were each provided with cameras and were free to walk around the school to take an unlimited amount of photographs of people/places/objects of importance to them, making their own decisions. The photographs of greatest significance to the children then acted as prompts to follow up discussions. If the children felt they were unable to take photographs (perhaps due to shyness), the groups of children delegated tasks amongst themselves so that photographs would still be taken.

The photographs were grouped into nine themes as follows: people (including friendship); place and environment; being physically active; being creative; play; learning; autonomy and choice; rules; and needs. The majority of the photographs were based around the first two themes of people and place and these are the two themes discussed here. The whānau has a particular meaning to Māori people within communities and within schools. The extended family (including grandparents, aunts, uncles, cousins etc.) has a strong influence on Māori families and it is quite usual for children to live with their extended family (whānau) or even friends of whānau, outside of their family home, rather than with their own birth parents (Waikato University, 2008). This may be for a number of reasons, one of these being the collective responsibility of whānau for children (Waikato University).

The people included in the photographs include friends, family members, teachers (past and present) and other adults within the school. Friendship is seen as an essential part of childhood and indeed adulthood (Hartup, 1992) and is an experience that can enable practical and emotional sharing (Tizard, 1986). Within these photographs, elements of friendship with peers are identified as well as the support and nurturing, that adults can offer within school. Explanations for the taking of ‘people’ photographs were varied. The children commented that their friends help and support them (in learning or cases of bullying), teachers look after them, or because they were family members who were important to them.

There is quite a range of photographs around the theme of place and environment including places that are special for a certain reason or connection, places where activities are undertaken or time spent with friends as well as parts of the school that are attractive. The photograph below (Photo 1) shows part of the school playground and a large mural that is painted on the side of a classroom wall and was taken by one of the children. The mural was described as important to one particular child as she hadn’t seen a mural like that at another school and that everyone at this school thinks it is important:“*I like seeing that wall ‘coz other people don’t get that kind of wall in school, but we do and we take care of it, we’re not allowed to tag (graffiti) on it and it’s important to the teachers too …*”. The importance of environment is indicated by Haley and Senior (2007) in their work within the healthcare environment. Here too, it is seen that the art works and environment play a significant role towards the well-being of the children in schools.

Some of the places are also identified as ones where something happens, for example, assembly. Assembly is not a time enjoyed by all children, but it is essential here to remember that these pictures allow the children the freedom to comment upon what is important to them as individuals. Other places of importance included places that were aesthetically pleasing such as the flowers in the garden or art works on display around the school. Some places were recorded by the children as places that were important to them as younger children such as the Reception classroom and the Small playground (Photo 2), where happy memories were associated.

The ‘Feelings Dictionary’ is an activity whereby the children considered various states of emotion and feelings and made a list of different ‘feeling words’. Following this, they acted the words out in freeze frame photography. The children did this as a group activity and directed one another to pose for the various feelings. These photographs were then matched to different experiences at school, for example, the photograph of happy was attached, for some children, to playtime.[ii]

Photo 1
Playground and mural, the mural's special, we can't tag (graffiti) on that.

Photo 2
Small playground, where we used to play when we were little kids.

A further activity carried out was that of the 'Facial Expression Chart'. A chart was made of the various parts of the school day, such as arriving at school, assembly, Physical Education., literacy, mathematics, art and so on. Next to the different times of the day, the children drew a face to demonstrate how they felt at those particular times of day. This highlighted the range of emotions felt between the different children for the various activities during the school day. It is felt that this activity is easily organised and an extremely useful insight for those working with children, or indeed other marginalised groups to understand the range of feelings experienced.

The 'Facial Expression Chart' (Photo 3) is shown below and is briefly explained here. In the first row, at the start of the school day, the children's drawings demonstrate a range of feelings from shy and tired to smiley and unsure. This is interesting to compare to the end of the school day that shows excited, sleepy, bored, sad and happy in an almost complete reverse for the start of the day. All of the children appear to like fitness and art within the chart and at other times of day the feelings are mixed, such as when reading, where the children draw a range of faces showing happy, confused and sad expressions. It is worthy to note that not everyone feels the same about different activities at school and this is reflected in the drawings, yet it is also worth considering the influences on this. Below is the chart completed with the children.[iii]

The last activity that shall be described in this section is that of 'Photo Art' (Photo 4). For this activity, the children were provided with large copies of their original photographs from the 'Tour of the School' and were free to create artistic pieces of work with them. This involved cutting, weaving, painting or any other activity the children chose to do. The creative time allowed the children further contemplation of their experiences of school, and it is felt that the creative process was of benefit to the children involved.

Photo 3: Facial Expression Chart

The research project enabled children's own voices to be heard through the medium of photography and the various activities carried out. This has played a vital role in understanding the children's perspectives on their school experience and their own well-being in a range of situations. As well as finding out about well-being for children in the primary school, the very process of the workshops has provided some of the children with an enhanced sense of well-being. The workshops were carried out in a way that enabled the children to feel comfortable expressing their opinions in a non-threatening environment. Some of the children whilst initially fairly reserved, showed signs of change during the course of the few weeks. These changes include: enhanced self-expression through visual communication; enhanced visual literacy; calmer and more focused in small group settings; increased empathy towards others; increased self-confidence; enhanced contributions in class (or other school activity); positive feelings from being heard; more confidence when seeking help and take on challenges; and overall appeared 'happier'.

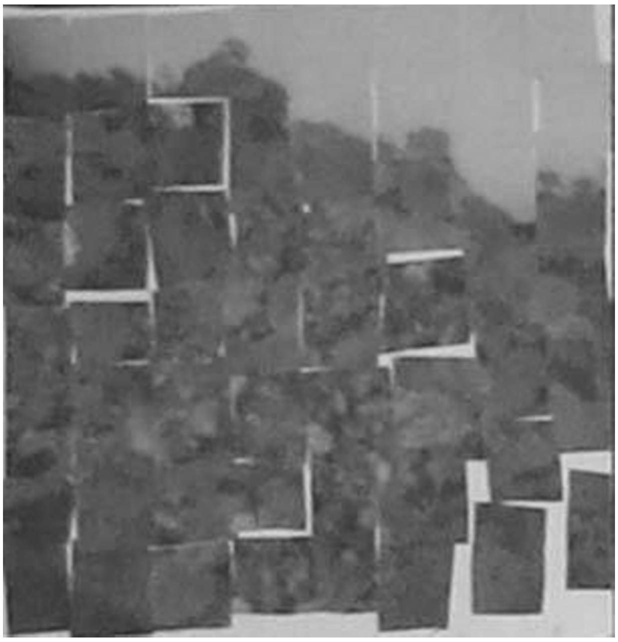

Photo 4: Photo Art – the school garden.

CONCLUSION

Practical and visual techniques with the children in this study, offered the opportunity for children to express their opinions in novel and alternative ways. The Photovoice-style technique promoted dialogue between the children and the researcher, while bringing about communication and understanding about well-being in the primary school from a child's perspective. The photographs enabled discussions to take place and it was the children who took ownership of this process in line with participative action research practice; along with a sense of empowerment.

The use of creative techniques facilitated articulation and shared understandings between participants. The children involved in this study were able to convey their ideas about well-being in terms of activities they participated in, where, with and who, alongside an insight into whether such activities were pleasurable, stimulating or meaningful. In addition, they recognised how their well-being can be influenced by issues outside of their control and they were able to express desires for improving given situations.

It is evident that the majority of children experienced a positive change through taking part in the series of workshops. It may be questioned whether it was the photography or the activities undertaken, being in a small group, being listened to or being out of the normal class routine that contributed to this change. It may be all of these experiences collectively or any one separately. Yet, it is believed that photography, rather than *any* activity was particularly beneficial, in that it provided an engaging, exciting and enabling tool that the children seldom had the opportunity to use in normal circumstances.

The global and Māori perspectives on development are particularly relevant in understanding the whole child embedded in their cultural, historical and social experiences (Bird & Drewery, 2003). Indeed, considering the uniqueness of the child (Pere, 1997) and not expecting certain developments to have taken place at certain ages (but rather accepting that children have different experiences and thoughts), allows a more comprehensive yet complex understanding of the child. Unfortunately, the way in which schools operate, grading children and predicting levels of achievement against national averages, does not always permit this process to happen.

Whilst the chapter refers specifically to the research carried out with children in New Zealand, further research projects are possible from these methods within a broad field. New research has already commenced using the same methods with disabled children and young adults in Malaysia (with funding from the British Council: www.rihsc.mmu.ac.uk/malaysiaukdisability/), however, it is felt that the research could easily evolve further with other marginalised groups. The visual and participative nature of this kind of study is very transferable and it is considered to be an appropriate and engaging method of research with potential benefits to all involved.

NOTES

[i] Well-being is a complex phenomenon not explored fully in this chapter, however, it is here considered that for children that they feel physically and emotionally safe in the school premises; have positive and effective relationships with peers and (all members of) staff; have confidence to take on a learning challenge and; are able to express their feelings about given situations.

[ii] No examples are provided here as they all contain images of the children

[iii] Names have been removed from the top but six different children are clearly shown here.

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DAN GOODLEY AND KATHERINE RUNSWICK-COLE

CHAPTER 14

DECOLONIZING METHODOLOGY

Disabled children as research managers and
participant ethnographers

INTRODUCTION

We approach this chapter with a number of communities in mind. Disabled people, people of color and gay, transsexual and queer people share a common history of being colonized by researchers who "have probed, recollected, appropriated and ultimately exploited their lives in insensitive and offensive ways" (Llorens, 2008. p. 3). Research is an imperialist, disablist and heteronormative peculiarity of modernist knowledge production. In 1999, Tuhiwai Smith issued a call for the decolonizing of methodologies and in this chapter we take up that call. Tuhiwai Smith demands us to think again about how research can be enacted – as a liberatory rather than oppressive venture. We do so in the context of an on-going research study funded by the Economic and Social Research Council 'Does Every Child Matter, post-Blair? The Interconnections of Disabled Childhoods' (http//www.rihsc.mmu.ac.uk/postblairproject/). The aim of the project is to explore the lives of disabled children in the North of England in the light of the policy agenda for children under the umbrella of *Every Child Matters* (DfES, 2004). The project runs from September, 2008 – August 2010. At the time of writing (summer 2009), we are in the process of listening to disabled children and young people, their parents/carers and professionals to discover what it means to be a disabled child in England in the 2000s. It is our attempts to listen to children and young people, and our on-going struggle to decolonize methodologies that is the focus here. By 'decolonise' we are referring to approaches to research that (1) do not contribute to the pathologisation, othering or individualisation of communities who have historically experienced marganilisation; (2) subvert traditional researcher-led, academia-based, and top-down models of research that have denied marginalised groups access, participation and power to the research venture; and (3) work with the complex and expert knowledge of these groups, as necessary resources for the generation of theories and practices and more inclusive

A. Azzopardi and S. Grech (eds.), Inclusive Communities: A Critical Reader, 215–232.

approaches to research. While queer, postcolonial and disability studies overlap and are drawn across then in this chapter, our question is more specific: how can research be implemented in ways that do not colonize or exclude disabled children?

APPROACHES TO DISABILITY RESEARCH

Just as postcolonial research has challenged the tendency to consider 'the 'native' as object for enthusiastic information-retrieval and thus denying its own worlding' and, simultaneously, being driven by 'nostalgia for lost origins' (Spivak, 1985, p. 245), similar challenges have been adopted to disability research which has measured the loss and adjustment of disabled people, while simultaneously trying to give a voice to the articulate 'victim' in research. Disabled people, people of color and gay, transsexual and queer people, exemplify communities that have been medicalised, pathologised, exoticised, belittled, stereotyped, excluded and objectified by research. As Franz Fanon (1993) argued, research is (and remains) a deeply imperialist project. The black man is rendered a deeply divided and troubling object by Western European and North American (WENA) research lens: that reconstitute visions of his otherness, his savagery and his irrationality through modes of research production that deny him access to the ownership of the research, perpetuate racist theories of cultural difference and accentuate the power of WENA ideas over those in the majority world. Similar observations of the exclusionary bases of research have been made by disabled scholars. Oliver (1992), for example, draws attention to the individualizing tendencies of disability research carried out *on* disabled *by* non-disabled researchers, who import medical and psychological understandings of disability and impairment in ways that reconstitute the disabled person as personal tragedy. Sherry (2006) suggests that colonizing and disabling theories complement one another in their conceptualization of cultural and bodily difference: they both speak of the black/disabled other with contempt and disgust. Sherry suggests that a further discriminatory lens of research – namely heteronormativity – colludes in the colonization of the queer other. Gay, Lesbian, Bi, Trans and Queer communities have been pathologised by research that recreates a societal preference for more 'normative' ways of (sexual) life. To be gay was to be mentally ill. This assumption, though now no longer part of psychiatric and psychological diagnoses of psychopathology, still undergirds social and human sciences. To be queer is to be wrong. To be disabled is to be lacking. To be non-WENA is to be at best exotic, at worst uncivilized. Queer, disabled and black communities are ritualistically excluded from the research agenda, are subjected to these forms of deficit-thinking by researchers and problematised through the development of theories which have at their core approaches to research which augment the power of researchers and increase the passivity of the 'subjects' they research.

Fortunately, these communities have contested dominant modes of research production. Postcolonial thinkers (Fanon, 1993), queer theorists (McRuer & Wilkerson, 2002) and disability researchers (see special issue of *Disability, Handicap & Society*, 7(2), 1992; Barnes & Mercer, 1997), each invite subjugated and colonized voices to re-enter research, and more significantly, cultural life and political critique. By rewriting the research agenda, we can exemplify a rewriting of theoretical engagement.

'Writing back' is a term employed by the postcolonial writer Tuhiwai Smith (1999) and refers to the re-introducing of minority perspectives into research production in order to change the colonizing, medicalising and pathologising tendencies of expert and professionally-led research programs. Writing back, following Fanon (1993, p. 30), involves people freeing themselves from the analyses of exploitative research and the categorization of parasitical researchers. It evokes change in the doings of research: to seek new assumptions, methods and relationships in which research is neither colonizing nor reductive but decolonizing and expansive. Fanon (1993, pp. 12-13) describes this as a process of socio-diagnosis: of waging war on both levels of the socio-economic and psychological. Disablism, homophobia and racism, can seriously threaten the ontological lives of disabled, black and queer people: "all this whiteness [ablebodiedness, heteronormativity] burns me" (Ibid., p. 114).

Clearly, this is a huge area of consideration, hence we turn to the specifics of our research project: to explore how decolonization might look in practice. Exploring research with disabled children is a useful place to de/construct de/colonize research. Both 'child' and 'disabled', evoke common sense notions of vulnerability, lacking autonomy and passivity. Research that adopts these common sense ideas contributes directly to the further 'othering' of disabled children. Moreover, we know that disabled children are often over-looked by disability research, and disability is often ignored by critical researchers. Instead, we look for more productive ways forward for 'revisioning' research which accentuates the potential of disabled children.

PARADIGMS AND METHODOLOGIES

The study of disability and of children, will be influenced by the researcher's vision of what makes for good research. Theoretical positions ground an approach to research, and particular research questions will direct the kind of study that is designed. To put it simply – how we study disabled childhoods will depend on whether or not we view research as science, or as meaning making. The following sets out approaches to researching disablism:

Table 1: Researching disablism (Adapted from Goodley, 2011)

Research and science	Research and meaning
Positivism – An objective deductive engagement with observable real things *How are disabled children included or excluded by society?*	Hermeneutics – A subjective inductive engagement with the processes of meaning making. *How do disabled children experience contemporary society?*
Operational definitions – a specific definition of the real thing we observe *A high rate of school exclusion is indicative of the educational marginalisation of disabled children*	Emergent understandings – we come to understand disablism through the meanings at play in the social world. *Schooling holds particular significance to disabled children and reflects society's views around the validity of disabled people's lives.*
Validity – are we measuring what we set out to measure? *Do the surveys measure educational exclusion?*	Authenticity – are we capturing our research participants' meaning making? *Do our methodologies give voice to disabled children's view of their education?*
Reliability and generalisation – the extent to which our measures are consistent in terms of their findings which can then be extrapolated to the wider population *Our study gives rise to consistent findings which allows us to say some general things about society's education of disabled children*	Indexicality and specificity – the extent to which our findings capture the rich meanings of a particular time, place and context *Our study is specific to one context, time and place which might resonate with other inter/national contexts*
Quantitative – methodologies and analytic frameworks numerically measure our research findings *Questionnaires, observations, surveys and experimentation give rise to data that are analysed using descriptive and inferential statistic*	Qualitative – methodologies and analytic frameworks engage with the meanings of our findings *Interviews, ethnography, narrative, discourse analysis give rise to data that are analysed using grounded theory, discourse, narrative and thematic analyses.*

While scientific research is clearly of use, our own interest is in meaning. We believe that this interest is in tune with decolonizing methodologies because not only are we seeking to revision the concepts of ‘child’ and ‘disability’, but we are also interested in reworking how research works with participants associated with these concepts. We therefore approach these concepts with trepidation: recognising that the concept of ‘disabled child’ brings with it associated ideas of passivity, powerlessness and voicelessness. These ideas originate from WENA concepts of child development, which infiltrate the research agenda and push researchers to work with disabled children in ways suited to this group (Burman, 2008). We want to challenge this homogenisation of disabled childhoods: a challenge in line with the aims of decolonizing methodologies. We ask how disabled children, in particular, experience the research process and the degree to which they have been both enabled and disabled by research practices, and ultimately how disabled children might be able to write back about their experiences of childhood and disability.

DISABLED CHILDREN WRITING BACK

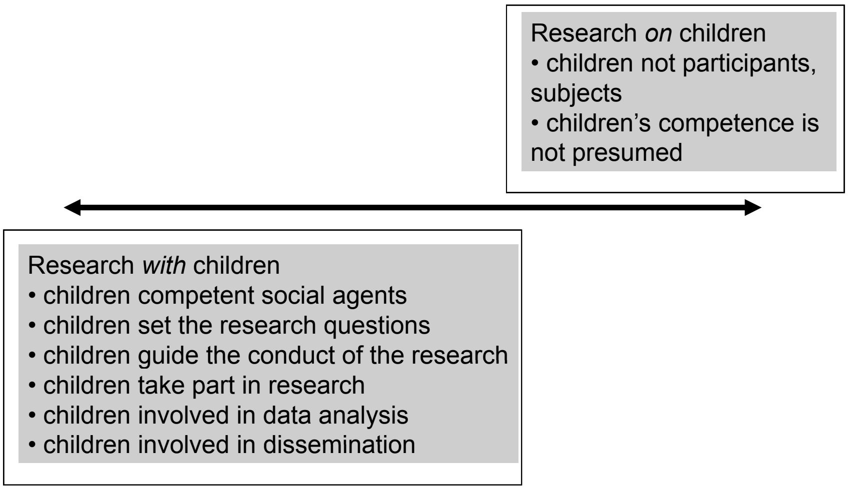
Disabled children represent a community that has been colonized by methodologies which have ultimately exploited and misrepresented their life worlds, not least because research which has claimed to ‘give voice’ to disabled children has often foregrounded the views of children’s proxies, including parents and professionals, rather than the views of children themselves (Watson et al., 1998). There are currently a number of political, legislative and sociologically driven imperatives for research to listen directly to all children, including disabled children. First, the United Nations Convention on the Rights of the Child (UNCRC) (1989), Article 12, asserts the child’s right to articulate their opinions with regard to issues which affect them and for these views to be heard. There is a duty to ‘assure to the child who is capable of forming his or her own views the right to express those views freely in all matters affecting the child, the views of the child being given the weight in accordance with the age and maturity of the child’ (Article 12). In Article 13, the child has the right to seek, receive, and impart information and ideas of all kinds. The principles of the UNCRC are reflected in England in the Children Act (2004) that asserts that children’s voices should be listened to by adults who make decisions about their lives. Children Act regulations make it clear that the requirement to involve, listen to and consult with children covers all children, including those with impairments (Morris, 2003).

These international and national legislative and policy frameworks reflect the corresponding change in sociological approaches to childhood. The ‘new sociology of childhood’ has promoted contemporary understandings of the child as an active social agent who is competent to be involved in decision-making (James & Prout, 2001). As Davis (1998, p. 326) points out, research with children has often meant that children’s voices have been conceptualised as “one homogeneous” voice. The common meanings of children have been stressed.

However, the experiences of groups of children (and adults) are separated by macro-social characteristics including gender, age, class and race, and, indeed, disability. Moreover, just as the differences between groups of children have been ignored, the differences *within* groups of children are often sidelined. The challenge, then, for researchers is to explore the “variety of childhoods” children experience (Levin, 1994 cited in Davis, 1998, p. 26) rather than treating children as a homogenous group. Writing back, for disabled children, is a complex process that attends to the variegated nature of childhood.

PARTICIPATION AS A CONTINUUM

Meaningful involvement of children in the research process can be extremely hard to initiate and to sustain. It is important here to pause for a moment to consider carefully what we mean by ‘participation’ and how this can enable disabled children to write back in the research process. Lewis and Porter (2004) usefully describe participation as being on a ‘continuum’. At one end of the continuum, the aim is to carry out research *with* children. Children are viewed as competent social agents (James & Prout, 2001). So, children are involved in setting the research questions, guiding the conduct of the research, being involved with data analysis and dissemination. At the other end of the continuum, children have research done *on* them. Children are seen not as participants in, but as the subjects of research. At this end of the continuum, children’s competence is not presumed, but questioned (see Figure 1 below). This echoes Barnes’ (1992) description of the emancipatory research paradigm in disability studies in which he makes the distinction between research done ‘on’ and ‘with’ disabled people. Barnes (1992) points to the exclusion that disabled people have experienced in the research process as subjects, not participants in research. The following allows a useful framework.



Research *on* children
- children not participants, subjects
- children’s competence is not presumed

Research *with* children
- children competent social agents
- children set the research questions
- children guide the conduct of the research
- children take part in research
- children involved in data analysis
- children involved in dissemination

Figure 1: Participation continuum (adapted from Lewis and Porter, 2004).

Disabled children have traditionally been excluded from the research process (Watson et al., 1998). There has been a good deal of questioning of whether they are capable of participating in discussion about their lives (ibid). There is a sense that children should only be consulted when developmentally 'ready' to take part and psychological research has been used to decide how to best determine who is ready and how to elicit children's views (Lewis, 2002). Children who develop atypically are, then, even more likely than their typically developing peers to be excluded from the research process. This has huge implications for an exponentially growing group of disabled children who are deemed so atypical that their views are hard, perhaps impossible, to access; children with the label of autism.

Lewis and Porter's image of the participation continuum, offers a useful tool for considering the nature of children's involvement in research. However, it is, perhaps, also worth considering how children might participate in the research process from the start to finish of that process. In Figure 2 below, we add to the participation continuum by considering where research sits on the continuum at each stage of the research process. In this way, we propose the research process/participation axis. The aim is to encourage 'would-be' researchers to consider where their research sits on the participation continuum at various stages in the research process.

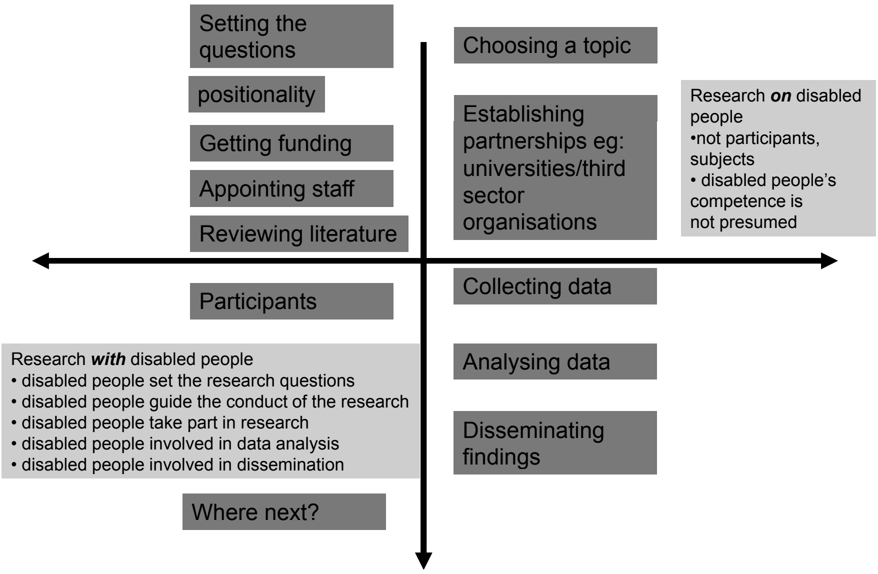


Figure 2: The participation/research process axis (from Runswick-Cole, 2008).

In our own project, we would accept that disabled children were not involved at the outset of the project; they did not choose the topic of research; they did not seek funding nor were they involved in appointing staff to the project. Yet, the children and young people in the project have been involved in collecting and analyzing the data and disseminating the findings. In this sense, we start as a colonizing project *but* with the aim of opening up and de-colonizing the process. This is inevitable. The facts are:

- our project is externally founded by a research council
- we are university based researchers (Universities can be seen as institutions built on the back of imperialism)
- we wrote the original research bid
- we sought approval through a host of internal and external ethics committees, many of which are based on what might be to be researcher-led, rather than child-led, aims and objectives.

Despite our acknowledgement of a lack of participation by children at various stages of the project, our underlying principles are participatory: we reject the overly deterministic developmentalist construction of disabled children as incompetent (Burman, 2008), which prevents children from 'writing back' in the research process. We argue that *all* children can be included as competent participants in research (Cocks, 2006). At this point, we are aware that in describing our commitment to de-colonizing the research process with disabled children, there is a simultaneous risk that we are exoticizing the process of working with disabled children. We want to avoid replicating this professional preciousness by insisting that we are not 'experts' in the field working with disabled children and that the methods and approaches we used with disabled children are not 'special' at all. In the research process, we have drawn on examples from early years research using photography, mapping, drawing and film amongst other methods (see Clark and Moss, 2001), despite this, we do not use early years approaches because we see them in some way as 'developmentally appropriate' for atypically developing children, particularly those labeled with learning difficulties, but because we recognise that early years researchers have used a range of innovative approaches which have allowed young children to participate meaningfully in research. Indeed our conviction that multiple methods are appropriate for all, led us to consider how we might also use these with adults in our study. What works well with one community might work well with another.

OPENING THE GATES – ACCESS AND SAMPLING

Inevitably adults are the first gate-keepers to children's worlds, who enable or prevent children to write back. We made a decision at the outset that we would not contact children directly to take part in the research. This approach seems at first, to be at odds with our commitment to seeing all children as competent social agents, capable of making decisions about their lives. However, as the children in the study were aged between 4-16, we felt that we could not approach children without their parents/carers' consent. There are, of course, also gate-keepers to adults' social worlds as much as there are for children. We discussed at some length how we would make contact with parents/carers of disabled children. We were reluctant to approach professionals (teachers, doctors, social workers) to contact parents/carers. Our concern was that, given what we knew of the (often fraught) power relationships between parents/carers of disabled children and professionals (Runswick-Cole, 2007; McLaughlin, 2006), parents/carers may feel compelled to take part in the research if a professional passed on the information about it. We were also concerned about how contacting parents/carers of disabled children through professionals, might position the research. We wanted to avoid being seen to be 'endorsed' by professionals.

We therefore chose instead to contact parents/carers through a diverse range of voluntary organisations. Some of the organisations specifically supported parents/carers of disabled children; others supported parents/carers of children with specific impairment labels. We also included parents' organisations which supported particular types of parents/ carers (including dads, British Minority Ethnic (BME) parents/carers, gay and lesbian parents/carers and adoptive parents/carers). Turning to communities other than professional ones, allows possibilities for enacting research that is not disabled by powerful politically endorsed institutions. Crucially, although we saw adults as medium conduits to children's worlds, we were aware that children are also gate-keepers to their worlds (Mandell, 1988) and that the children themselves must decide whether or not to participate. It is to these thorny ethical issues that we now turn.

Mapping the ethical labyrinth

Like other research projects, we also faced three key issues in working with participants: informed consent, confidentiality and anonymity. The first issue, consent, is widely debated in childhood studies (Lewis, 2002; Cocks, 2006). Often in childhood research the distinction is made between 'consent' and 'assent'. Children are considered to give 'assent' rather than 'consent', because 'assent' refers to the child's agreement to take part when another (usually a parent/carer) has already given consent for the child to take part (Lewis, 2002). However, Cocks (2006) goes on to explore notions of 'assent' more fully. Cocks describes assent as the relationship between the researched and the researcher, and the trust within that relationship which means the child accepts the researcher's presence. Morris (2003) is clear about the information children should receive before agreeing to take part in research: they should know what questions will be asked; what their parents/staff will be told; if the research has a point and will it change anything; why they have been picked; what information does the researcher already know about the child and who gave it. Morris suggests that children should know about the researchers' skills/experience. They should have a choice about where and when the interviews should take place; have someone with them if they wish; and be able to refuse to answer questions or stop the interview at any time. In our contact with children, we also saw consent as an on-going process and this meant that we revisited this with children repeatedly, gently checking that they were still happy to take part. For example, we checked each time we met that the children were happy to continue to take part. We negotiated times of day and venues that suited the children.

We were also clear with children that although we were promising confidentiality and that we would not tell other people what they had said without their permission, we also made it clear that if they told us something which meant that we had good reason to believe they were at risk of harm, we would need to pass this on. We also promised anonymity so all names were changed in the study and where we felt that details from the data gathered might compromise anonymity these were changed, for example, the combination of revealing a child's impairment label and ethnicity risked exposing his/her identity. We also used a variety of software to obscure children's features and other possible identifying information in photographs and in films. We also recognised the power this gave us in the research relationship and we also attempted to address this issue.

POWER

We took seriously the idea that the power of adults can be reduced by inviting children to be part of the research process. Habitually, children are not able to shape the research process (Grover, 2004). Indeed, as we noted above, the research agenda and questions were set by adults at the beginning of the current study. However, we did want to attempt to redress this imbalance by involving children in the research process throughout the duration of the project. To that end, we drew on the expertise of the Young Person's Research management group made up of a group of young people who describe themselves as having 'learning disabilities'. We were keen that the involvement of the research management group moves beyond the tokenistic, so we approached an existing self-advocacy group of young disabled people. The advantages of approaching and paying an established group, was that they were familiar with one another, the location where they met and how they ran their meetings. Their role was to decide how the information should be gathered; advise how to gather information directly from disabled children and young people; comment on initial analysis of information gathered and identify key themes; and to make suggestions for dissemination of the research (Morris, 2003).

In enabling disabled children to write back in the research process, we agree with Christensen (2004) that power is not simply situated in categorical positions, such as 'adult' or 'child', but rather in the negotiations we make within social encounters. Children are familiar with interviewing from television, radio and the internet and they are able to subvert the relationship by inverting the role of interviewer/ interviewee. In order to increase participation, however, this involves moving out of the stifling confines of the research world of Universities, and engaging with a priori expertise to be found in existing community-based groups of young disabled people.

Listening to children

Our participatory approach to the study meant that we were fundamentally committed to listening to children. Our starting point for discussion was the framework adopted by Clark and Moss (2001, p. 5). We adopted the following principles:

– to treat children as experts and agents in their own lives
– to use multi-methods in recognition of the different 'voices' or languages of children
– to seek to establish a climate of listening.

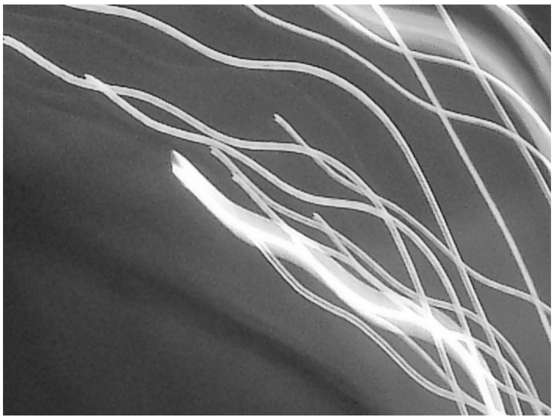
We engaged in a number of activities that fell into three broad (and sometimes overlapping) categories: interviews, photography/film and ethnography.

We recognised that a variety of tools alone is not sufficient to enable participation, and that successful participation is contingent on researchers questioning their methods, and that this is a continually reflexive process. We were aware of the need to adapt the research tools to suit each child or young person (Morris, 2003). We were also aware that no matter how reflexive we tried to be in our methods, we may not escape the charge that we were 'colonizers' in children's worlds, yet we were aware that '[a]dult researchers may have less insight into the daily lives of children than they think they have' (Save the Children, 2004, p. 13 cited in McLaughlin, 2006). In our current project we have adopted a narrative approach to research. This builds on our earlier work around narrative research, life story and the use of fiction in social research (Goodley, 1996; Goodley & Clough, 2004; Goodley et al., 2004; Runswick-Cole, 2007). Narrative research has been closely associated with disability studies and an emancipatory research framework (Goodley, 1996). Narratives can take the form of life story, (auto)biography, vignettes and composite narratives. Narrative methods move researchers beyond traditional methods of inquiry and away from numbers, variables, tables, and questionnaires, to focus on meaning making and multiple realities. We aim to draw on a number of narratives including those directly taken from the children (through interviews) and those written by us, as researchers, in 'the field'. Our work with children suggests that this approach to narrative research might be in danger of further colonizing disabled children's lives.

PHOTOGRAPHY OVER NARRATIVES

While our original research proposal aimed to 'ethnographically explore the lives of disabled childhoods' and 'draw on the accounts of disabled children through participatory interviews', our attention quickly shifted to what we could learn from the existing participatory ethnographies of our disabled co-researchers. A number of the children we got to know did not chose interviews as their preferred method of communication. Our initial ideas about involving ourselves 'ethnographically' with the everyday lives of disabled children were baulked at by some of the children. In short, children did not want us talking to or observing them. Who could blame them? Yet, too often, research projects continue to pursue their research agendas and chosen methodologies in the name of research objectives rather than the research preferences of their participants. Listening to disabled children we found that a key 'method' of giving voice preferred by them was found in their use of technology – and specifically photography. Mountian et al. (2009) offer a convincing, though critical, analysis of the potentials of using visual methodologies to capture the everyday, mundane and ordinary aspects of social life. What comes through strongly in their account though, is the power of ownership afforded through the use media such as photography. The advantages were that for many children in the study, photography was a familiar 'method' in their lives, not an unfamiliar tool of the colonizers. The children were used to being both the subjects of photographs as well the photographers. Using digital technology, the children were already documenting their own lives in this way before the project started. This documentation became what we called 'participatory ethnography' – through photographs and films, children became ethnographers in their own lives. Where we had planned to spend time with children and families in a host of ethnographic environments, it became clear that this was not what the children wanted. In addition, and in some cases, instead of our ethnographic involvement with children, we lent them project mobile phones with in-built cameras, and gave them a very open invite to use them in ways that they enjoyed. Children were happy to show us their worlds in photography, but not always happy for us to enter them in person. Most of the children were happy to talk about the photos they had taken and we approached this using the principles of photo voice (Booth & Booth, 2003), rather than imposing our own narratives on the photographs, the narratives were co-constructed with the children. One young person was happy to tell us about his experiences but only through the mediums of photography and film. We never met him in person but through photography he allowed us into his life world. He made notes for us about the images, but the story we tell about them was not constructed with him. It is, perhaps a cliché to suggest that a picture says a thousand words, however, as we begin to disseminate the work that we are doing, we sensed that our most powerful methods of communicating about children's lives are the photographs and films they have made.

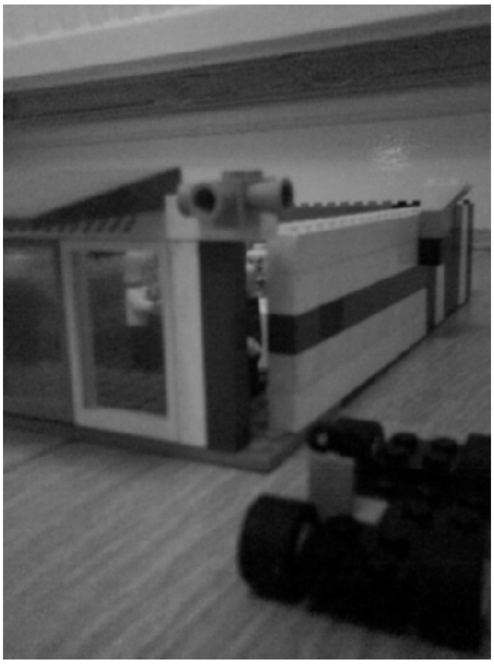
The photos present snippets of life that the children sanctioned to be included in the research. Their inclusion felt like the research agenda was being shifted in ways that the children approved of.



Picture 1: Lights

Picture 2: Me

Picture 3: My hamster died



Picture 4: CCTV at the supermarket

A FEW WORDS OF CAUTION …

The drive to listen to and to consult children and young people using methods which they are already familiar with, may risk becoming yet another invasion of their time, ideas and spaces. Disabled children and their parents/carers have often been subjected to surveillance by professionals (McLauglin et al., 2008) and we are conscious of the risk that by invading their life-worlds through the medium of photography, we are adding to this surveillance. Clark et al. (2003) point to the irony that the more imaginative the methods become for listening to young children, the greater the possibility of invading their private worlds. Lewis (2004) accuses government and children's charities of understating or ignoring the child's choice for silence, privacy, or non-response. These charges could equally be made to us as academic researchers: we were pushing them to give us some things – of their worlds – to sate our desires as researchers for the collation of data. In our attempt so see the world from children's perspectives, we must also acknowledge the need to be respectful of both children's views and of their silences (Clark & Moss, 2001).The children have taken their own photos and, as a result, we could make a claim to the children having the power to frame their own lives within the research project. Indeed, the positive pictures of disabled children following 'full lives' enjoying music, holidays, theme parks, computers, friends, and television are powerful images which support the claim that disabled children are like other children and enjoy the same things and have the same aspirations (Contact-a-Family, 2002). However, the bullying and discrimination that disabled children also told us about are not represented in the images. It may be that children know that positive, not negative images, are usually the expected outputs of photography. Another interpretation is that the photos evoke potential and possibility: a key aim of decolonizing methodologies which challenge the pathology and tragedy of previous research findings. Do the photos that we present here do something subtle and significant – represent disability and childhood in ways that queer the usual tragic subjects?

That said, there is a further worry that using photographs, legitimises the levels of surveillance disabled children experience. Garland-Thomson (2002, p. 56) has described the history of disabled people as being "visually conspicuous while politically and socially erased". She goes on to say that disabled people have always been "stared at" (p. 56). The danger of disability photography, she suggests, is that it offers "the spectator the pleasure of unaccountable, uninhibited, insistent looking" (p. 57). This leads us to question whether in seeking to promote disabled children's voices, by asking them to frame their own lives literally and metaphorically through the medium of photography, this only serves to legitimise staring. In our attempts to listen to disabled children, it may be that we have become the unwitting agents of the colonizers. By cataloguing and presenting images of disabled childhoods, we may also be simultaneously providing opportunities for 'legitimate' staring. Nevertheless, that disabled children authored their own photographic representations is surely a productive alternative to the dominant images of disabled people produced by others. Instead of imagery recreating the usual tragic metaphors of loss and lack, disabled co-researchers' images hint at complexity and, conversely, the little things in life which are no less important. This big/small; complexity/simplicity is at the heart of a decolonizing venture that recognizes mimicry over pathology. The photos we present here in some small way, shift the gaze of the research project – away from a narrow focus on 'disability' and 'child' – and recast considerations of what matters to disabled children. The photos illuminate creativity, self-presentation and relationality of our photographers: words so often not immediately associated with research on or with disabled children. Our photographers write back at disability research – unsettling presumptions around what matters to disabled children – asking us to stop: to rethink, to ponder, to challenge. Decolonizing methodologies destabilize the linearity of research projects which seek direct answers to refined questions. They crucially re-engage with culture and meaning that might be ignored by research that is fixed to strong concepts of 'disability' and 'childhood' and the related professional and theoretical ideas. In terms of narrative research: our photographers present complex snapshots of personhood that challenge the tendencies of narrative researchers who seek complete, frozen texts of lives (Goodley et al., 2004). Just as narratives are constantly evolving so too are our photographers and their take on their worlds.

CONCLUSIONS

This chapter reflects the difficulties of facilitating disabled children to write back in a research process that is governed by (often non-disabled) adults. Disabled children have been marginalized and excluded from the research process, their lives have been scrutinized and surveilled in research just as they are scrutinized and surveilled in every day contexts, where they are judged to fall outside the 'natural variation' (Michalko, 2002); disabled children are categorized variously as 'special', 'in need' and 'incompetent'. Writing back from such a starting point is difficult to achieve, not least as the methods adults employ to try and decolonize methodologies, run the risk of reinforcing the intrusion and exploitation that we set out to avoid. While photography is a popular and familiar tool within childhood research, Garland-Thomson's work in disability studies teaches us that photography can be used to enable prolongued, intrusive staring which is legitimatized by the distance between the subject and the observer which photography creates. However, what we hope to have demonstrated here is that working with disabled children and young people – as research managers and participant ethnographers – starts the process of queering non-participation. At the very least, our own experiences demonstrate that research can be very different from the tradition of offensive probing and appropriating – instead offering spaces for connecting with the expertise of disabled children. Perhaps this is the essence of community research – that starts with presuming capacity and celebrating creative potential of the communities we work with.

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