

Czech and Slovak
**Journal
of Humanities**

Anthropologia culturalis

1/2020

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Czech and Slovak Journal of Humanities is published two times a year in the following sequence: *Philosophica*; *Historica*; *Theatralia et cinematographica*; *Musicologica*; *Anthropologia culturalis*.

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Zpracování a vydání publikace bylo umožněno díky finanční podpoře udělené roku 2020 Ministerstvem školství, mládeže a tělovýchovy ČR v rámci Institucionálního rozvojového plánu Filozofické fakultě Univerzity Palackého v Olomouci.

Published and printed by:

Univerzita Palackého v Olomouci (Palacký University Olomouc)

Křížkovského 8, 771 47 Olomouc, Czech Republic

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Graphic Design: TAH & Lenka Wünschová

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ISSN 1805-3742

On the cover: The Chrysanthemum Seal or the Imperial Seal of Japan, Gate of the Yasukuni Shrine, Tokyo. Photo: Jakub Havlíček, 2013.

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Cross-Cultural Fieldwork: The Heart of Anthropological Research

Abstract | This article was originally a keynote address presented at a 2017 conference on international fieldwork, hosted by Palacký University's department of Sociology, Andragogy and Cultural Anthropology. It reviews the history of ethnographic fieldwork and the rationale behind it, the potential insights such research may offer, and the challenges – physical, logistical, emotional, and ethical – that often face fieldworkers, particularly when studying remote communities and unfamiliar cultures. I then examine my five decades of ethnographic field experience in light of these more general considerations.

Keywords | Fieldwork – Ethnography – Participant observation – Cultural relativism
.....

1 Introduction

In October 2017, I was honored to address Palacký University's conference on international fieldwork. The conference was hosted by a vigorous young graduate program in cultural anthropology, and cross-cultural fieldwork has been at the heart of anthropology since the discipline's inception. The following comments lay out the nature of anthropological fieldwork and its role in promoting an understanding of cultural differences.

2 Historical Background

Prior to the twentieth century, most of what we knew about non-Western communities came from the reports of explorers, conquistadores, missionaries, traders and colonial administrators. Anthropologists still rely on much of that information. However, even in the nineteenth century, Lewis Henry Morgan, sometimes referred to as the father of American anthropology, depended upon fieldwork for his data. Morgan's contributions grew out of his personal friendship with Iroquois leader Ely S. Parker (also known by his indigenous name, Do-ne-ho-ga-wa) and the time that he spent living with the Seneca as a result of that relationship.

In the late nineteenth and early twentieth centuries, Franz Boas, the foundational figure of modern American anthropology, built his career on fieldwork with the Inuit of Baffin Island and the Kwakiutl of Vancouver Island, off Canada's eastern and western coasts, respectively.¹ Boas founded North America's first doctoral program in anthropology at Columbia University and, almost single-handedly, educated an entire generation of prominent American anthropologists.

¹ Franz Boas, *Kwakiutl Ethnography*, ed. Helen Codere (Chicago: University of Chicago Press, 1967); Ludger Müller-Wille, ed., *Franz Boas among the Inuit of Baffin Island, 1883–1884: Journals and Letters*, trans. William Barr (Toronto: University of Toronto Press, 1998).

His most influential students, Alfred Kroeber, Robert Lowie, Ruth Benedict, Margaret Mead, Edward Sapir and Fay-Cooper Cole, built their reputations largely on field research.

While Boas was establishing anthropology as an academic discipline in the United States, the British scholars A. C. Haddon, C. G. Seligman and W. H. R. Rivers organized the Torres Straits Expedition, focused on the islands between northern Australia and New Guinea. Then, in 1910, Bronislaw Malinowski moved from Poland to the UK to study with Seligman, Edward Westermarck and R. R. Marett. During the second decade of the twentieth century, Malinowski revolutionized fieldwork through his study of the Trobriand Islands, off the eastern coast of New Guinea. In the introduction to his path-breaking book, *Argonauts of the Western Pacific*, Malinowski touted the virtues of long-term fieldwork and participant observation.² He emphasized the importance of living like the people one is studying, learning their language, and taking part in their daily (and nightly) activities, thereby coming to experience and understand the world from their perspective.

From that time onward, virtually all advanced anthropology graduate students in the United States and Great Britain have been required to experience long-term fieldwork, usually in a community that is very different from their own. For American anthropologists, such fieldwork has often been with Native North American tribes, as illustrated by Benedict's experience with the Zuñi, Lowie's with the Crow and Kroeber's with the Indians of California.³ For anthropologists from the UK, fieldwork has often been in British colonies or former colonies, as famously exemplified by Radcliffe-Brown's work in Western Australia and the Andaman Islands or Evans-Pritchard's research with the Nuer and Azande.⁴

3 Why Fieldwork?

Fieldwork is important to anthropological understanding because it gives the researcher a chance to get to know the people being studied—and get to know them *as people*. It helps the anthropologist appreciate and understand others in their own terms, a perspective known as cultural relativism. A relativist perspective enables us to gain an empathetic understanding of our interlocutors' worldviews and avoid ethnocentrism—a common inclination to judge others by one's own cultural standards. However, to do effective, relativistic ethnography requires the anthropologist to communicate with the people being studied in their own language and, as Malinowski pointed out, it takes considerable time.

An equally fundamental question is why one should conduct one's fieldwork overseas—or, at least, in a community that differs radically from one's own. My answer is that anthropology is the broad study of what it means to be human.⁵ It seeks to tell us what is human nature and

² Bronislaw Malinowski, *Argonauts of the Western Pacific* (London: Routledge and Kegan Paul, 1922).

³ Ruth F. Benedict, *Patterns of Culture* (Boston: Houghton Mifflin, 1959 [1934]); Robert H. Lowie, *The Crow Indians* (New York: Farrar and Rinehart, 1935); Alfred L. Kroeber, *Handbook of the Indians of California* (New York: Dover Publications, 2012 [1925]).

⁴ A. R. Radcliffe-Brown, *Social Organization of Australian Tribes* (Melbourne: Macmillan, 1931); *The Andaman Islanders* (Glencoe, Illinois: Free Press 1948 [1922]); E. E. Evans-Pritchard, *The Nuer* (New York: Oxford University Press, 1969 [1940]); *Witchcraft, Oracles, and Magic among the Azande* (New York: Oxford University Press, 1976 [1937]).

⁵ I have discussed the value of this anthropological enterprise in Richard Feinberg, "Human Nature in Cross-Cultural Perspective," invited presentation to Lidová žižkovská univerzita a SOK, Prague, Czech Republic, June 24, 2019a and "Anthropology, Human Nature, and Social Change," interview with Eva Svobodová for WAVE.CZ, Czech National Public Radio, July 18, 2019b (aired August 1: <https://wave.rozhlas.cz/socialni-darwinismus-nefunguje-lidska-prirozenost-je-mytus-rika-antropolog-rick-8028459>).

which aspects of human behavior are culturally rather than biologically patterned? That question, in turn, is critical as we attempt to solve our myriad social problems. If people are, by nature, self-centered and competitive, that limits our options. If human nature is flexible and behavior malleable, it permits us to explore innovative solutions. To identify what is compatible with human nature, however, requires an understanding of all variations of human behavior. After all, anything that people do anywhere is within the possible behavioral repertoire of human beings, and inspection of the ethnographic record reveals that lifeways one might find unimaginable are, in fact, standard in some places. That point was vividly relayed in a newspaper article I came across early in my career and often read to students in my introductory classes. Under the title, “Take Sex and Money in Stride, Live Past 100,” Georgie Ann Geyer wrote, in part:⁶

Quito, Ecuador—If you want to live to 130 and remain sexually active at least until you’re 90, stop competing for members of the opposite sex and straining to make money.

A casual approach to such things seems to account for the astonishing, recently discovered longevity of the “viejos”—old people—of Ecuador’s lush, hidden valley of Vilcabamba.

“These people simply have a special mentality,” said Dr. Miguel Salvador, the noted Ecuadorean cardiologist who discovered the viejos [...]. “They live very quietly and don’t even like to do business with others.

“In the sexual aspect, there is no competition for women or for men. I never heard of a fight for love. If a woman wants to go with another man, she just goes, and her husband finds another woman. There is no jealousy.

“When you ask them if there are thieves in Vilcabamba, they say, ‘Well, maybe there are, but it’s not important because there is nobody to steal from.’”

Love? “There is love between parents and children,” Dr. Salvador went on..., “but even it is relative. When the children leave, the parents often forget their names.

“I’ve heard men say things like, ‘That’s the one who went away years ago; what was his name?’”

I hasten to add that Geyer is a journalist, not an anthropologist, and I would hesitate to stake my professional reputation on the literal accuracy of everything in her article. But anything the reader might find surprising in Geyer’s piece can easily be matched by well-documented ethnographic reports. In some places, people unleash lethal violence on what might seem to be the slightest provocation; in others, they can hardly be provoked to fight. Some people glory in warfare, while others see war as a form of insanity. In some places (the Western world being a prime example), people compete to acquire material goods. In others, such as Melanesia and the north-west coast of North America—historically and still, to some degree, today—people gain prestige and power by competing to give things away, even if it means impoverishing themselves. In some places thousands of people may be off limits as sexual or marital partners because of the incest taboo. Among the Navajo Indians of the southwestern United States, for example, one may not marry into one’s own or any of several related clans, and in parts of China one should not marry anyone with the same surname. At the opposite extreme, we have historical and ethnographic accounts of societies where brother–sister marriage has been acceptable, and even encouraged. Among the best-known cases are the royal families of ancient Egypt and high-ranking chiefs in pre-contact and early-contact Hawai’i.

To take what may be a more familiar example of behavioral variation, in the Western world one typically stands up to show respect. People most often stand to greet a new acquaintance, and a recent controversy in the United States involved National Football League players who protested the treatment of African Americans by refusing to stand while the national anthem was being performed. Yet there are places where one shows respect by kneeling, sitting or even lying

⁶ Georgie Anne Geyer, “Take Sex and Money in Stride, Live Past 100,” *Chicago Daily News*, June 14, 1974.

prostrate on the ground. Historically, one showed respect by kneeling before European royalty. And on Anuta, a Polynesian community in the eastern Solomon Islands, one greets a chief by crawling on hands and knees and pressing one's nose to the chief's knee.

In much of the world today, the standard greeting involves shaking hands. But under certain circumstances—which vary from place to place—a person greets by hugging or kissing. Sometimes kissing is only appropriate between participants of the opposite sex. In other cases, kissing between members of the same sex is considered appropriate. In some instances, one kisses on the lips; in others, on the cheek. And sometimes, as among the Inuit of North America or certain Pacific Islanders, one greets by pressing noses.

Likewise, in much of the world the most appropriate form of sexual contact is heterosexual, assuming it is with the right person at the right time and under the right circumstances. Yet, there are places where the most appropriate form of sexual contact is considered to be homosexual, and heterosexual contact is regarded as ritually polluting.⁷

While American and Western European anthropologists are typically expected to do research overseas, that does not preclude them studying their own communities. Research at home, however, is usually conducted after having done fieldwork elsewhere. One reason is that knowledge of another culture helps us notice points about ourselves that we otherwise would take for granted. Again, this observation is well illustrated by a newspaper article, this one authored by former *Washington Post* columnist Art Buchwald. Under the title, "Football is Barbaric in Foreigners' Minds," Buchwald described that most-American of sports from a British perspective.⁸ In his words:

If there is anything that really bugs me it is watching a pro football game with a foreigner. I just had the experience. My friend was visiting from London with his wife, and they both seemed very excited about seeing their first American football game on television.

It happened to be the Redskin-Dallas game, and for a Redskin fan I knew it wasn't going to be much fun. The game started out all right, but before long it got rather bloody. This is when they both started asking questions.

"IS THE OBJECT of the game to injure as many players on the other team as possible?" the husband asked.

"No, that is not the object of the game," I said.

The wife said, "Do you get more points for breaking a man's leg or his neck?"

"You don't get points for breaking either his leg or his neck. You get penalized for it."

"Oh," said the husband. "What is the penalty?"

"Your team is penalized 15 yards."

"Do you mean to say that if you break an opponent's leg, you only get 15 yards against you?"

"What do you think he should get?" I said, trying to hold my temper.

"In England I believe it's three years in prison," the wife replied.

"It's a game!" I said. The men who play expect to have their legs broken. That's what makes it so exciting.

IN THE SECOND QUARTER, the wife turned to me. "Did you notice that one of their chaps hit one of your chaps with his fist?"

"That's not permitted," I said.

"Then why doesn't someone do something about it?"

"No one saw it," I replied.

"Everyone on television must have seen it," she said.

"The referee didn't see it. If he had, he would have called a personal foul."

"Which means the player would be thrown out of the game?" the husband asked.

⁷ See, e.g., Gilbert Herdt, *Rituals of Manhood: Male Initiation in Papua New Guinea* (Berkeley: University of California Press, 1982).

⁸ Buchwald, Art., "Football is Barbaric in Foreigners' Minds," *Akron Beacon Journal*. P. D4 (1977).

“Of course not. You don’t get thrown out of the game for slugging another player. If that happened you wouldn’t be able to have a pro football game. The thrill of football for a player is to hit an opponent and not get caught doing it.”

ONE OF THE REDSKINS was stretched out on the field, groaning in agony.

“How long is he permitted to lie on the field,” the husband asked, “without being penalized?”

“As long as he wants to. When a man is seriously injured, we even permit a doctor to treat him.”

“How civilized,” the wife said.

I couldn’t keep my temper any longer. “What do you think we are—barbarians?”

“Quite,” the husband said.

The lesson, from an anthropologist’s perspective, is not that Americans are truly barbaric or that American football is, objectively, uncivilized. Nor are the English morally superior. The British sport of rugby is, in many ways, as violent as football, and it is played without American-style protective equipment. The point, rather, is that practices one takes as normal may well strike outsiders as outrageous or offensive. One consequence is that anthropologists who conduct fieldwork overseas, upon returning home, are able to observe their own society and culture through fresh sets of eyes.

That is certainly what happened to me when I returned to Chicago in 1973. After a year and a half in the Solomon Islands, where public displays of affection between persons of opposite sex were held to be obscene, I was struck by the sight of young men and women walking next to each other, looking at each other’s faces, laughing, smiling and even holding hands. After spending a year on one of the Solomons’ outer islands, I had gotten used to women going bare-breasted with nary a hint of self-consciousness but protecting their modesty by carefully covering their legs above the knee. And I had grown accustomed to children going naked until about the age of five.

The experience of fieldwork, and of learning from the field experience of others, can help us appreciate customs that initially strike us as offensive or irrational. We come to understand how seemingly-strange practices often make sense when seen in their larger cultural context, and we are able to view others with a new-found aura of respect. At the same time, field experience enables us to view ourselves and our own culture with a new sense of modesty and to problematize practices we previously had taken for granted. Moreover, learning about cultural differences can stoke our imagination and help us find creative answers to seemingly-intractable problems.

4 Challenges of Fieldwork

Most anthropologists are convinced of fieldwork’s value as the primary means by which we acquire data. In addition, it can be personally rewarding. Yet, it is not easy. Among the challenges that must be overcome are isolation from friends and family, establishing rapport with members of the community we hope to study, and contending with the trauma of culture shock.

Anthropologists who conduct research in distant—and, often, quite isolated—communities may well be out of contact with their closest kin for weeks, or even months. These days, a mobile phone might ease the burden. Still, we sometimes find ourselves in areas beyond a signal’s reach and must await a ship to deliver old-fashioned letters.⁹

In addition to the risk of loneliness, successful fieldwork requires us to build relationships of trust with our interlocutors. In many cases, however, we arrive at our field sites uninvited

⁹ Changes in fieldworkers’ modes of communication with the outside world, and the implications of such changes, are discussed by several contributors to Laura Zimmer Tamakoshi, ed., *First Fieldwork: Pacific Anthropology, 1960–1985* (Honolulu: University of Hawai’i Press, 2018).

and unannounced. Our hosts may have little understanding of anthropology or of why we are there. They may believe that strange outsiders are spying for an oppressive national government or colonial authorities. They may fear that any information they divulge will be turned against them. To make matters worse, we often arrive with little understanding of the local language and culture, rendering friendly communication difficult. Our hosts sometimes put up with us because they feel they have no choice, or because we carry trade goods that they might find useful. Consequently, it is unsurprising when our hosts attempt to access our supplies while providing as little data as possible. The frustration of finding oneself in such a position was well expressed by Evans-Pritchard in describing his experience conducting fieldwork with the Nuer of eastern Africa:¹⁰

I: Who are you?

CUOL: A man.

I: What is your name?

CUOL: Do you want to know my name?

I: Yes.

CUOL: You want to know my name?

I: Yes, you have come to visit me in my tent and I would like to know who you are.

CUOL: All right. I am Cuol. What is your name?

I: My name is Pritchard.

CUOL: What is your father's name?

I: My father's name is also Pritchard.

CUOL: No, that cannot be true. You cannot have the same name as your father.

I: It is the name of my lineage. What is the name of your lineage?

CUOL: Do you want to know the name of my lineage?

I: Yes.

CUOL: What will you do with it if I tell you? Will you take it to your country?

I: I don't want to do anything with it. I just want to know it since I am living at your camp.

CUOL: Oh well, we are Lou.

I: I did not ask you the name of your tribe. I know that. I am asking you the name of your lineage.

CUOL: Why do you want to know the name of my lineage?

I: I don't want to know it.

CUOL: Then why do you ask me for it? Give me some tobacco.

Encounters such as this, which drove Evans-Pritchard to his self-described “Neurosis,” are commonly experienced by anthropologists engaged in field research. For example, Gerald Berreman described many months of tribulation as he attempted to obtain the confidence of village residents in northern India.¹¹ And even Malinowski's diary includes such comments as, “The old man began to lie about burials. I became enraged [...]” “With great effort I wormed out of him material relating to kinship [...]” and “I was [...] fed up with the savages [...]”¹² Under conditions of physical discomfort, pressure, isolation, and frustration, of course, we sometimes utter statements that we later regret. Clearly, however, Malinowski's relations with his interlocutors were less harmonious than some of his writings might suggest.

Still, commonplace as such experiences may be, most anthropologists persevere and manage to create successful research partnerships. One key ingredient is simply time: the longer one lives in the community, and the better one gets to know the local people, the greater the opportunity to

¹⁰ Evans-Pritchard, *The Nuer*, 12–13.

¹¹ Gerald D. Berreman, *Behind Many Masks* (Ithaca: Cornell University Press, 1962); *Hindus of the Himalayas* (Berkeley and Los Angeles: University of California Press, 1963).

¹² Bronislaw Malinowski, *A Diary in the Strict Sense of the Term* (New York: Harcourt, Brace and World, 1967), 35, 66, 85.

build relations of trust. In addition, dramatic events may help to break down barriers and create a sense of solidarity. One poignantly-described case involves Clifford Geertz, who attended an illegal cock fight on Bali, Indonesia.¹³ When police broke up the event, Geertz, instead of posing as an innocent passerby, fled with the locals. By identifying with them in a moment of crisis, he created a bond that propelled him to one of the most distinguished anthropological careers of the mid- to late twentieth century.

Another challenge is culture shock: the sense of disorientation, sometimes accompanied by emotional depression, that one is likely to experience when suddenly immersed in unfamiliar surroundings. Should local expectations and understandings of the world conflict with those to which one is accustomed, a common response is agitation and confusion. One dramatic explication of these feelings comes from the late Napoleon Chagnon, a controversial American anthropologist who held a prominent position in the discipline for half a century. In describing his early experience with the Yanomamö of Venezuela, Chagnon wrote:¹⁴

[...] The thing that bothered me most was the incessant, passionate, and aggressive demands the Indians made. It would become so unbearable that I would have to lock myself in my mud hut every once in a while just to escape from it. Privacy is one of Western culture's greatest achievements.

But I did not want privacy for its own sake; rather, I simply had to get away from the begging. Day and night for the entire time I lived with the Yanomamö I was plagued by such demands as: "Give me a knife, I am poor"; "If you don't take me with you on your next trip to Widokaiya-teri I'll chop a hole in your canoe!"; "Don't point your camera at me or I'll hit you"; "Share your food with me!"; "Take me across the river in your canoe and be quick about it!"; "Give me a cooking pot!"; "Loan me your flashlight so I can go hunting tonight!"; "Give me medicine [...]. I itch all over!"; "Take us on a week-long hunting trip with your shotgun!" and "Give me an axe or I'll break into your hut when you are away visiting and steal one!" And so I was bombarded by such demands day after day, months on end, until I could not bear to see an Indian.

In the early going, before one has adjusted to the new milieu, the anthropologist may develop an array of defense mechanisms. Chagnon observed:¹⁵

I once referred to [...] peanut butter as the dung of cattle. [The Yanomamö] found this quite repugnant. They did not know what "cattle" were, but were generally aware that I ate several canned products of such an animal. I perpetrated this myth, if for no other reason than to have some peace of mind while I ate. Fieldworkers develop strange defense mechanisms, and this was one of my own forms of adaptation. On another occasion I was eating a can of frankfurters and growing very weary of the demands of one of my guests for a share in my meal. When he asked me what I was eating, I replied: "Beef." He then asked, "What part of the animal are you eating?" to which I replied, "Guess!" He stopped asking for a share.

At length, most field workers manage to internalize their hosts' expectations and respond to new situations in a culturally appropriate way. Until that happens, however, one may anticipate some memorable experiences.

Aside from the challenge of adjustment to a new cultural milieu and isolation from family and friends, the fieldworker may face physical danger. Often researchers encounter novel pathogens to which they have not built immunity. Should a medical emergency arise, it can take days—sometimes even weeks—to reach a hospital. Thus one either must depend on local remedies or be prepared to act as one's own doctor. Snake bites, shark and crocodile attacks,

¹³ Clifford Geertz, *The Interpretation of Cultures* (New York: Basic Books, 1973): 421–453.

¹⁴ Napoleon A. Chagnon, *Yanomamö: The Fierce People* (New York: Holt, Rinehart and Winston, 1968), 8.

¹⁵ *Ibid.*, 7.

swarming insects, falling from a cliff, or being lost at sea may pose substantial risks, depending on the field site's location.

A final set of challenges that deserve mention involves ethical dilemmas. The purpose of our fieldwork is to learn about others rather than to change them. Still, our presence in the community is bound to introduce changes. And those changes are not always for the better.

5 Overview of My Field Experience

Through the past five decades, I have pursued field research in diverse locations and experienced many of the interactions described above. In this section, I will describe some highlights.

My first anthropological fieldwork was with the Navajo Indians of the southwestern United States. The Navajo (known in their own language as Diné “The People”) are the largest Native tribe in the USA. They occupy a sixteen million acre reservation that takes up a large section of the state of Arizona along with smaller sections of Utah and New Mexico. The community in which I worked is located along the southern bank of the San Juan River in the northwestern corner of New Mexico. I spent 2½ months in 1970 in a community I have called “Riverside,” collecting data for my master’s paper at the University of Chicago.¹⁶

I lived in a one-room cement house with a married couple and their seven children. The family ran an irrigated farm, primarily raising corn and hay. In 1970, Riverside had no running water or electricity, and one had to drive nine miles over pot-holed dirt roads to get to the nearest town. On a number of occasions, my car got stuck in the mud. Several times, my engine overheated, and I had a variety of other mechanical malfunctions. On one occasion, I came close to being shot, not because of anything I had done but, simply, because I was in the wrong place at the wrong time. Yet, I learned a great deal, I was welcomed into the community, was treated as a member of the family, and I remain in contact with some of the children, who are now mature, responsible adults with children of their own.

Most of my fieldwork since 1972 has been with Polynesians in the southwestern Pacific. In 1972–1973, I spent a year on Anuta, the most remote island in what was then the British Solomon Islands Protectorate (and, since 1978, the independent nation of Solomon Islands). I have returned to work with people from Anuta, either in the national capital of Honiara or on the island itself, for periods ranging from a few days to several months on a half dozen occasions, most recently in 2013. In 1984, I worked for four months with Polynesians on Nukumanu Atoll in the far eastern corner of Papua New Guinea, and in 2000 I worked with Nukumanu communities in Papua New Guinea’s national capital, Port Moresby, as well as on the island of Buka. In 2007–2008, I spent about nine months conducting research with people of Taumako—like Anuta, a Polynesian island in the Solomons’ Temotu Province. And in 2012 I spent two months with islanders from Tokelau, a group of Polynesian atolls north of Samoa in the central Pacific.

In addition to my Polynesian research, I directed a field school in a community known as Brady Lake, just outside of Kent, Ohio. The field school ran for two summers in the late 1970s, and in 1981 it became my home. My family and I have lived in Brady Lake for forty years and, in 1982, I published an article on spatial symbolism and totemism in the Brady Lake area.¹⁷ The idea that totemism might exist in my home town would never have occurred to me had I not studied anthropology and done field research elsewhere.

¹⁶ See Richard Feinberg, *Social Change in a Navajo Community* (New Haven: Human Relations Area Files Press, 1979a); “Shifting Residential and Subsistence Patterns in a Navajo Community” *Ethnos* 44, nos. 1–2 (1979b): 242–258. “Riverside” is a pseudonym.

¹⁷ Richard Feinberg, “Muskrats of Brady Lake: A Case of American Totemism,” *The Gamut* 5 (1982): 20–26.

Other than Brady Lake, of the communities that I have studied, I know Anuta best, and it is with members the Anutan community that I have had the most enduring relationship. In contrast with the experience of Evans-Pritchard, Berreman, Chagnon, and many others, establishing rapport with Anutans was never a problem.¹⁸ The island was picturesque, with productive orchards, vegetable gardens and fishing grounds. In many ways, it was the Hollywood image of a perfect South Sea Island paradise.¹⁹ Yet even living there required serious adjustment.

Anuta is accessible only by ship, and ships arrived at intervals that ranged from one to three months. I never wanted for human companionship, but I felt isolation from my family and friends at home. I had no way to share my adventures other than through letters I would send off on the ship whenever it arrived, and only via mail arriving on the same ship could I find out how my compatriots at home were faring. Particularly distressing was the realization that if there were a family emergency I had no way to assist in dealing with it. Nor was there anyone on Anuta with whom I could meaningfully share thoughts about such matters as the presidential election, the Vietnam War (which was raging at the time), or the fortunes of my favorite sports teams. Today Anutans are more worldly than they were in 1972, but the island remains hard to reach. Ships typically visit no more than two or three times per year, and it is out of range for mobile phones or Internet connections.

Far from being short of human companionship, I often felt I had too much. I lived in a one-room leaf house with a married couple who frequently had a dozen or more visitors. Like Chagnon, whether I was reading, taking notes, eating a biscuit, or dressing a wound, my privacy was nil.

For months I struggled with Anutans' tendency to laugh at others' small misfortunes.²⁰ Should I stub my toe, hit my head on a low-hanging branch, or get pounded onto the reef by a breaking wave, those around me laughed uproariously, and I could not help but feel that they were rejoicing at my pain. Eventually, I realized that their motivation was altruistic: working from the premise that emotions are contagious, they laughed on the assumption that it would help cheer me up under difficult circumstances. Nonetheless, I found it quite a challenge to embrace the local mindset.

Anuta is visually stunning, with lush vegetation, surrounded by a clear blue sea and white sand beach. Coconut palms sway gracefully overhead. But that picture often was disrupted by hordes of flies, mosquitoes and cockroaches. To get to the open sea to fish or swim, I had to walk across the fringing reef, and cuts or abrasions were common. If those injuries were not properly dressed, they easily became infected, and such infections if not treated promptly could turn into life-threatening tropical ulcers. Moreover, should I develop a serious medical problem, professional assistance was weeks—perhaps even months—away.

Risks to life and health occurred in other contexts too. Once, I took part in a four-day canoe voyage to an uninhabited island thirty miles (fifty kilometers) away. On our return, as we were carrying the canoe up Anuta's beach, the bow broke off. I asked the expedition's organizer

¹⁸ Richard Feinberg, "The Role of the Ethnographer in Shaping Attitudes toward Anthropologists: A Case in Point," *Pacific Studies* 2 no. 2 (1979c): 156–166.

¹⁹ See, e.g., 1000 Days for the Planet—Human Adventure, "Anuta, Hidden Paradise" YouTube, accessed October 27, 2019, <https://www.youtube.com/watch?v=QeABQLDRlwk>.

²⁰ Richard Feinberg, "What's So Funny about That? Fieldwork and Laughter in Polynesia," in *The Humbled Anthropologist: Tales from the Pacific*, ed. Philip DeVita (Belmont, CA: Wadsworth Publishing, 1989), 53–60; Richard Feinberg and Gina Zavota, "Behaviorist Ethics in Polynesia," paper presented to session titled "Whose Truth, Whose Meaning? Studies of Everyday Subjectivity, Activity, and Performance" at the annual meeting of the American Anthropological Association. Washington, DC. November 28–December 3, 2017.

what would have happened had the bow come apart a few hours earlier, during our journey. He laughed and responded, “We don’t know; we probably would have died at sea.”

On another occasion, in 1972, I was caught in a current while swimming and had to struggle to return to the passage and get back to the island. And my visit in 2000 occurred during a civil war in the Solomons. Outer islands like Anuta were not directly caught up in the fighting, but while staying with an Anutan friend in Honiara, I regularly heard gunshots behind our house. All that said, however, the risks of doing fieldwork can be overstated. No place is risk free, and some dangers one might face in the US or Europe are completely non-existent on Anuta. To take just one example, there is zero chance of being run down by a truck.

6 Ethical Dilemmas in My Fieldwork

Anthropologists often find their interlocutors are just as curious about them as fieldworkers are about the people they have gone to study. Yet, in sharing information about our ways of life, we may convey understandings that cause problems in our host communities. Thus, one Anutan friend in 1972 wanted to know about America’s political system, which is very different from the of hierarchical order to which he was accustomed. After hearing about Western democracy, he went on to challenge the Anutan chiefly system, leading to problems for himself and for those around him.²¹

The anthropologist is also likely to possess objects that are unfamiliar to community members. Sometimes, those items might be useful to our interlocutors. However, they may also involve a less-than-obvious downside. One such case occurred in 1983 when I was investigating Anutan navigational techniques. In order to compare local understandings of directionality with those of Westerners, I brought with me a magnetic compass. The senior chief, who also was one of the island’s leading navigators, immediately recognized the value of my compass to a voyager on the open sea and out of sight of land. If natural signs, such as the movements of stars or regular wave patterns, are obscured by inclement weather, the compass needle nonetheless continues to point toward the magnetic north, enabling the navigator to tell which way the canoe is heading. Thus, the chief asked me to leave my compass with him when I returned home. His premise, that it might guide voyagers who are hampered by unexpected bad weather, and that it could, potentially, save lives was indisputable. On the other hand, I was concerned that it is easier to follow a magnetic compass than learn the movements of the stars, winds, waves and currents. If Anutans came to depend on the compass, I was afraid, they might not bother learning the techniques perfected by their ancestors and, in the end, be *less* safe on long-distance voyages.

I debated with myself for some time whether to honor the chief’s request. In the end, I did. I was pleased to learn on subsequent visits that islanders were relying on the compass as a back-up instrument rather than depending on it as their primary navigational aid. In fact, I discovered that the number of Anutans familiar with the older navigational techniques had actually increased since my prior study. My decision, then, worked well; but that was not a foregone conclusion.

Similarly, medicines may save lives, and it is often wise to arrive at one’s field site with enough surplus to share with one’s hosts. If not administered properly, however, they can do more harm than good. Food supplies are less likely to cause harm than improperly-used medications, but they can easily become a focus of political contention.

²¹ This incident is described in Richard Feinberg, *Anutan Concepts of Disease* (IPS Monograph Number 3, Lā’ie, Hawai’i: Institute for Polynesian Studies, 1979d).

Perhaps my most distressing ethical dilemma involved an unstable young Anutan man. On March 4, 1972, I arrived aboard the government ship *MV Kwai*. Several islanders took a canoe to meet the ship, and a few swam out to greet us. One of the swimmers clambered to the deck, seated himself in front of me, and began to shout in my direction. I assumed he was speaking Anutan, of which I only understood a few words at that time; others soon informed me that he believed himself to be speaking English. They added that he was *karange*, the Solomon Islands pidgin English pronunciation of “cranky,” meaning mentally disturbed, and they told me to ignore him. That was my first introduction to Anuta’s “cranky man.”²²

The “cranky man,” to whom I have referred by the pseudonym, Tangatavare, was the son of a Tikopian mission teacher who came to Anuta in the 1930s. He married an Anutan woman, and the couple moved back and forth between the two islands. Tangatavare was born on Tikopia; then, in 1953, the couple moved permanently to Anuta with two of their children: Tangatavare and his younger sister. Normally, when a man from Tikopia marries onto Anuta, he becomes affiliated with either the extended family household of his wife or one of his “bond friends,” to borrow an expression from Sir Raymond Firth (1954, 1967).²³ Because of personality conflicts, however, none of those extended families was willing to accept this couple, so the woman, her husband, and their two children came to constitute an independent nuclear family household. That was not unheard of on Anuta, but neither was it the norm. Some years later, the husband died, leaving the wife and son to make ends meet. The woman’s brother and his family helped provide her with food and space to live, but this small group of semi-outsiders never had the close relationship that Anutans value with an extended kinship network.

Even at a young age, Tangatavare was difficult. He refused to pay ritual respect to his maternal grandfather, who was an important community leader. To make matters worse, he would torment his elder—hitting him with sticks, pulling on his beard, and sticking his fingers in the old man’s nose and ears. The grandfather lived to 90 years of age, and when he began to suffer age-related dementia, he declared that after his death the illness would pass on to his grandson. According to my interlocutors, that is just what happened.

Tangatavare never did productive work but subsisted either on his mother’s labor or by stealing crops from other people’s gardens. He would wander out onto the fringing reef at night and shout hysterically. He caused disturbances, even starting fights, in church. He showed no respect for either of the island’s chiefs. And sometimes he would swim to sea on stormy days, forcing other men to risk their lives to swim out after him and bring him back. I shared a house with a married couple who had no children, and whenever the adults were gone a young boy from another household was assigned to stay at our place to keep watch. His job was to alert others if Tangatavare should enter the house and attempt to steal my supplies.

At length, I was approached by a number of islanders with a proposition. They had previously been in contact with the protectorate’s medical authorities, asking that Tangatavare be removed to the psychiatric hospital in Honiara, the Solomons’ capital. The District Medical Officer responded that little could be done for the man, and he was better off at home, surrounded by people who knew, cared about and were prepared to look after him. My interlocutors were less than satisfied with that response, and they thought my voice might have more influence than theirs with medical authorities. Hence, they asked that when the Medical Officer came on the next ship I try to convince him to remove the “cranky man.”

²² Ibid.

²³ Raymond Firth, “Anuta and Tikopia: Symbiotic Elements in Social Organization,” *Journal of Polynesian Society* 63 (1954): 87–131; Raymond Firth, *Tikopia Ritual and Belief* (Boston: Beacon Press, 1967), 108–115.

For some time, I puzzled over how I should respond to the Anutans' request. Clearly, if Tangatavare were removed, life would be more pleasant, both for me and for my hosts. On the other hand, I worried about what would happen to him should he be forced to leave. It was unclear how he would fare overseas and whether he would ever be able to return to his home island. I spoke with a number of community leaders, including Tangatavare's maternal uncle, and uniformly they agreed that I should do my best to procure whatever treatment might be available. So, with both a sense of apprehension and relief, I agreed to petition the medical authorities on the community's behalf.

The next ship arrived in June, and the District Medical Officer was aboard. I spoke with him about the situation and related the islanders' wish that Tangatavare be removed to Honiara. As my hosts expected, the medical officer took my observations to heart and, after a few hours of contemplation, agreed to the proposal. He suggested that all concerned take an additional month to prepare and, with the next ship, Tangatavare was on his way to the facility. That was the last I ever saw him, as my fears were born out.

I left Anuta in February 1973 and departed the Solomons that May. I was unable to get back for an entire decade and, on my return, I was informed that Tangatavare had died. The details were somewhat hazy. As far as I can reconstruct the chain of events, he remained in Honiara's psychiatric hospital for a year or two. Once the medical authorities decided that they had done all they could for Tangatavare, they released him. But he never returned home. Anutans recoiled at the thought of his rejoining the community. And, since his father was a Tikopian who had not been fully integrated into Anutan society, islanders felt justified in their decision to keep him at arm's length. Instead, he moved to the Tikopian colony of Waimasi on Makira island, where he stayed with some paternal relatives. Then, one day, he mysteriously disappeared.

People tracked him down and found his remains by a riverbank. No one saw what happened, but the evidence seemed to suggest that he had tried to swim across the river and was eaten by a crocodile. In the larger islands of the Solomons, crocodiles are recognized as a serious hazard. Anyone who opts to swim in—or walk near—fresh water is taking a risk. Occasionally saltwater crocs even take an unsuspecting swimmer at sea, usually near a river mouth. Thus, the explanation had a ring of plausibility.

The story left me in a state of shock that I have never fully left behind. To this day, I wonder: was I responsible for Tangatavare's death? In one sense, clearly, I was not. At the time of the unfortunate event, I was in the USA, half a world away. I did not encourage Tangatavare to settle in Waimasi; I did not place a hungry crocodile at that spot in the river; nor did I urge him to try to swim across. Yet, I played a critical role in a chain of events that led to his demise. Had I not spoken convincingly to the District Medical Officer, Tangatavare most likely would not have been removed from his home island. He would not have spent a year or more in Honiara, would not have moved to Waimasi, and would not have had the opportunity to pursue his ill-advised excursion. Without doubt, my action made life pleasanter and more relaxed for people on Anuta. No one has criticized my decision to become involved. And it is possible, of course, that even had he stayed on Anuta some other dire event would have befallen. He could have drowned at sea, fallen from a cliff or tree, been attacked by sharks, or died of infectious disease. But it is also possible that he would be alive today had I not agreed to intervene. And still I second-guess my fateful decision.

7 Scientific Objectivity

Ethnographic fieldwork is compatible with a variety of methodological approaches, ranging from putatively scientific quantitative surveys to humanistic qualitative and reflexive studies. Early advocates of empirical long-term field research emphasized scientific rigor, with Radcliffe-Brown even characterizing “social anthropology” as the “natural science of society.”²⁴ That commitment to science in cultural and social anthropology has been maintained by many researchers, particularly by scholars with ecological, socio-biological or bio-cultural orientations. In contrast, symbolic, interpretive, and post-modernist anthropologists, many of whom also claim roots in the Boasian tradition, have argued that no study is truly objective, that researchers always approach their subjects from a perspective that has been shaped by their cultural backgrounds and experience, and that ethnography is intrinsically a product of interaction between the researcher and his or her interlocutors. If such critics are correct, ethnographers should write themselves into their accounts, producing a genre often termed reflexive anthropology.²⁵ This is a long-standing and contentious issue that can only be mentioned here.²⁶

8 Concluding Thoughts

For me as well as many anthropological colleagues, fieldwork offers many challenges. At the same time, it has been given me enormous satisfaction. I had the good fortune to become connected to a warm, welcoming community and was provided with a second family. My experience on Anuta, as well as other places where I have done fieldwork, has led to enduring personal relationships. Fieldwork provides one with new ways of looking at the world. Living for an extended period with people who think and act in a way to which the anthropologist is unaccustomed at home inevitably offers new perspectives on and understandings of cultural diversity. Of the human condition. And, not least, of oneself.

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²⁴ See, e.g., Franz Boas, “The Limitations of the Comparative Method of Anthropology” *Science* 4 (1896): 901–908; Bronislaw Malinowski, *A Scientific Theory of Culture and Other Essays* (Oxford: Oxford University Press, 1944); A. R. Radcliffe-Brown, *Structure and Function in Primitive Society* (London: Routledge and Kegan Paul, 1955).

²⁵ E.g., Paul Rabinow, *Reflections on Fieldwork in Morocco* (Berkeley and Los Angeles: University of California Press, 1977).

²⁶ My own assessment, which finds merit in both camps, is outlined in Richard Feinberg, “Contested Worlds: The Politics of Culture and the Politics of Anthropology,” *Anthropology and Humanism* 19 no. 1 (1994): 20–35.

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Expatriates or Skilled Labour Migration? Who Can We Talk about in Brno?¹

Abstract | The Czech Republic is classified as a typical immigration country. Immigration is directed mainly to larger cities, and Brno is the second-largest city in the Czech Republic. In the narratives of local immigration experts, which are subsequently transferred to the public space, the classification that distinguishes two basic categories of foreigners is widely used. The desirable highly skilled workforce contrasts with other foreigners whose economic benefits are suppressed. The highly skilled migration population are known as expatriates, which is used without theoretical reflection and empirical verification. The main aim of the text is to determine whether the term expatriates can be applied in the case of Brno. Findings from the secondary analysis did not help in this. The data on which we developed the theoretical discussion comes from our online survey entitled *The Great Brno Expat Survey* conducted among people from abroad with those who have actual experience with living in the South Moravian Region. The exploratory research itself and the effort to exclude “real” expatriates from its broad framework resulted in the finding that only 15% of respondents in our sample meet the definition of expatriates. The subsequent analysis of latent classes indicated that relatively few respondents appear in the category that is in line with the definition of “Expat” – approximately only a quarter. We therefore decided to propose our own solution – a new typology that would be more in line with social reality. Analysis of the latent classes showed three basic types and demonstrated the importance of the social ties of immigrants. Categorization cannot be construed as definitive, but situational.

Keywords | Analysis of latent classes – Brno – Brno Expat Centre – Expatriate – Highly skilled migration – Highly qualified migration – Labour migration

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1 Introduction

The topic of migration has become a new public agenda in the Czech Republic that has crossed the borders of expert worlds. Over the course of almost three decades after November 1989, it has become increasingly evident that the Czech Republic is one of the countries with a positive migration balance. With some exceptions (decreases), the numbers of foreigners in the Czech Republic have been continuously increasing and in 2017 exceeded the threshold of half a million people. At the end of 2018, foreigners with a valid residence permit in the territory of the Czech Republic totalled 566,931 and the share of foreigners with a residence for 12+ months in the Czech population reached 5.1%. An increase in the number of foreigners is especially

¹ The text was supported by the project “Expats in South Moravia Region: Stay and Needs,” TL01000465, TL – Program for the Support of Applied Social Sciences and Humanities Research, Experimental Development and Innovation ÉTA.

observed in large cities. The city of Brno, although far behind Prague, became the second most important target of immigration in the Czech Republic, which attracts diverse categories, especially labour migration. The so-called migration crisis had no actual impact in the Czech Republic, but it opened up a discussion on immigration issues and established a whole new public agenda. Subsequent demand for scarce labour became another stimulus for the arrival of other people with migration experience and is currently being reflected in the increasing number of so-called labour migrants. It turns out that we still have little reflected data on the subject of our discussions—the foreigners themselves. The fulfilment of visions of Brno as an international and cohesive city cannot do without a substantive discussion on the formation of meaningful and effective strategies and policies that will respond to the presence of foreigners in the city and at the same time address the quality of life of all its citizens. Such strategies cannot be developed, however, on the basis of assumptions and beliefs. It has to be derived from knowledge and expertise, which is based on facts and data—the policy of evidence. This is based on an approach that emphasizes the importance of scientific knowledge gained through the use of methodology and its subsequent application in policy-making.

The following text is a contribution to this evidence-based policy and responds to a confusion that has significant consequences in the environment of the city of Brno. In the narratives of local immigration experts, which are subsequently transferred to the public space, the classification that distinguishes two basic categories of foreigners, is widely used. A desirable highly skilled workforce contrasts with other foreigners whose economic benefits are questioned or suppressed (e.g., asylum seekers, low-skilled workers, lower-educated workers, occupying manual and blue collar professions). It is maintained and transmitted over time by the legitimization strategies used by a number of local actors and institutions that respond to the growing public concern about immigration. Legitimizations seek to justify the presence of part of the educated population of foreigners, a desirable highly skilled workforce that contributes to the economic development of the city. There is thus a distinction between foreigners working in the primary and secondary labour markets, while social usefulness is primarily attributed to highly qualified foreigners.² We were more engaged by the common and widely used term “Expats,” which is accepted without theoretical reflection and has become a wide term for all qualified migrants in Brno. If we are to deal with the category of expatriates, it is appropriate to ask a question whether they are represented in the category of highly qualified migration at all and whether this is a majority or minority representation.

2 Highly Qualified Migration and Expatriates

First, we define the category of highly qualified migration and then expatriates. The definition is important because it will allow us to further clarify what categorizations are adequate to describe the immigration situation in Brno.

There are a great number of ways of categorizing international labour migration; it depends on the criteria that the researchers attribute crucial importance to and which they, in contrast, choose to neglect. Intensifying globalization processes are behind the growing volume of international labour migration. Researchers are examining unskilled or less skilled migration much more systematically than skilled or highly qualified migration. In addition, “migrants [...] at the bottom of the economic scale [...] have been largely ignored in business literature, which concentrates on highly skilled and privileged migrants, often discussed in terms of brain drain

² Daniel Topinka and Tomáš Janků, *Cizinci v Brně. Vztahy, vazby a sítě podpory* (Brno: Barrister & Principal, 2018), 39.

and brain gain.”³ The beginning of the establishment of research activities, focused on the migration of skilled workers, can be dated back to the early 1990s.⁴ At present, such studies are part of many different disciplines within a wider range of social sciences⁵ for which, compared to other disciplines, the interest in the given category of migrants is undoubtedly the liveliest. The migration of highly skilled people is attracting growing attention in policy arenas and academia.⁶ The diversification of research orientations in the listed disciplines, hand in hand with the diversification of the forms of labour migration, is obviously manifested by considerable conceptual diversity, which can sometimes make things somewhat confusing.⁷ We have observed the emergence of a global labour market for various professions and occupations and a process of mutual selection between skilled migrants and skill-targeting states.⁸ As we find out in our example of research of expatriates in Brno, many concepts overlap or occur concurrently, which complicates analytical work.

So what is the basic definition of highly qualified migration? Astrid Eich-Krohm⁹ states that highly skilled migrants are distinguished by having special skills, subject to their field of study and higher education. She links highly skilled migration to the dynamic development of the global economy over the last fifty years. It involves many aspects, such as the strategy of nation states or the individual motivation of migrants in terms of career development. Although at first glance highly skilled migration may look like “successful” migration, it is affected by the dynamics of global labour markets, such as discrimination, unemployment, offshoring of skilled jobs and non-transferable degrees.

The definition of the concept of highly skilled migration is rather problematic, especially if it is derived exclusively from the tertiary education of migrants; the concept itself has many variations and uses different classifications. Highly skilled migration is generally defined as those people with a tertiary education. It has, however, two limitations. First, it is both too narrow and too broad a definition—many talented people will be excluded and many within the category may have few practical skills, second, important linkages exist between high-skilled and less-skilled migration systems.¹⁰ Critics of the term highly skilled migration generally point to the fact that the term refers to various forms of transnational elites, transnational knowledge workers, skilled transients, qualified immigrants or immigrant professionals.¹¹ Mathias Czaika and Christopher R. Parsons¹² describe great diversity in the overall size of labour flows, the skill composition of

³ Yvonne McNulty and Chris Brewster, “The Concept of Business Expatriates,” in *Research Handbook of Expatriates*, eds. Yvonne McNulty and Jan Selmer (Cheltenham: Edward Elgar, 2017), 39.

⁴ Steven Vertovec, “Transnational Networks and Skilled Labour Migration,” accessed March 1, 2019, <http://www.transcomm.ox.ac.uk/working%20papers/WPTC-02-02%20Vertovec.pdf>.

⁵ Sylwia Przytuła, “Migrants, Assigned Expatriates (AE) and Self-initiated Expatriates (SIE) – Differentiation of Terms and Literature-Based Research Review,” *Journal of Intercultural Management* 7, no. 2 (2015): 93.

⁶ Mathias Czaika et al., *High-Skilled Migration. Drivers and Policies* (Oxford: Oxford University Press, 2018), 1.

⁷ McNulty and Brewster, “The Concept of Business Expatriates,” 21.

⁸ Barry R. Chiswick, *High-skilled Immigration in a Global Labour Market* (Washington DC: AEI Press, 2011).

⁹ Astrid Eich-Krohm, “Twenty-first-century Trends in Highly Skilled Migration,” in *Routledge International Handbook of Migration Studies*, eds. Steven J. Gold and Stephanie J. Nawyn, (London, Routledge: Routledge International Handbooks, 2014).

¹⁰ Ronald Skeldon, “High-Skilled Migration and the Limits of Migration Policies,” in *High-Skilled Migration. Drivers and Policies*, ed. Mathias Czaika (Oxford University Press, 2018), 62.

¹¹ McNulty and Brewster, “The Concept of Business Expatriates,” 39. Magdalena Nowicka, “Migrating Skills, Skilled Migrants and Migration Skills: The Influence of Contexts on the Validation of Migrants’ Skills,” *Migration Letters* 11, no. 2 (2014): 171–186.

¹² Mathias Czaika and Christopher R. Parsons, “High-Skilled Migration in Times of Global Economic Crisis,” in *High-Skilled Migration. Drivers and Policies*, ed. Mathias Czajka (Oxford: Oxford University Press, 2018).

these flows, and the continued agglomeration of the international mobility of human capital, as well as the increasing diversification of such flows over time.

The determinants that influence the arrival and stay of highly qualified migration to urban areas include: preference seeking of individual migrants, firm employment practices and local decisions, as well as state regulatory frameworks. The attractiveness of cities is also conditioned by the outcome of the attractiveness of urban amenities, the wages in the destination city, the movement of firms and the openness of a state.¹³

Expatriates are usually also considered one of the types of skilled migration. The word expatriate comes from the Latin word “expatriatus” where “ex” means “out” and “patriā” means “homeland.”¹⁴ Contemporary English dictionaries define the meaning of expatriate or expat as “a person who lives outside their native country” (e.g., Oxford Dictionary).¹⁵ This broad meaning is narrowed to a meaning that underlines the importance of the labour qualification: “A person settled outside their country of origin (... and in practice) the term is generally applied to professionals, skilled workers, or artists from affluent countries [...], rather than all immigrants in general.”¹⁶ It may well be seen in this context that it moreover reflects the idea that expatriates are often limited to migrants from the rich “West” and/or that they are migrants from the higher social strata.¹⁷ Sarah Kunz¹⁸ considers the term expatriate as unstable and contested, as emphatically embraced by some, and rejected by others. Both the categories migrant and expatriate are joined by a constitutive but not straightforward relationship that is deeply politicised and specifically works to reproduce racialized power relations. The polysemy of these overlapping terms is thus reflective of and operative in racialized power relations in ways that demand our analytical attention. The trouble is that the categories’ relationship reflects the “polyvalent mobility” of race through the use of neutral migration categories.

The study of expatriates has followed the traditional expatriate “cycle” – selection, training, relocation and adjustment, pay and performance and return, with initial attention on the earlier

¹³ Michael C. Ewers and Ryan Dicce, “High-Skilled Migration and the Attractiveness of Cities,” in *High-Skilled Migration. Drivers and Policies*, ed. Mathias Czaika (Oxford: Oxford University Press, 2018), 188–189.

¹⁴ Przytuła, “Migrants, Assigned Expatriates (AE) and Self-initiated Expatriates (SIE),” 94.

¹⁵ See the link: <https://en.oxforddictionaries.com/definition/expatriate>.

¹⁶ Alisdair Rogers, Noel Castree, and Rob Kitchin, *Dictionary of Human Geography* (Oxford: Oxford University Press, 2013), 143.

¹⁷ On this historical legacy, which the concept of expatriate is still bearing in many respects, there is often criticism based on the use of this term in professional discourse. (Anne-Meike Fechter and Katie Walsch, “Examining ‘Expatriate’ Continuities: Postcolonial Approaches to Mobile Professionals,” *Journal of Ethnic and Migration Studies* 36, no. 8 [2010]: 1197–1210.) In some cases, even foreigners (expatriates) themselves distance themselves from the use of the concept or designation of expatriate, most often because they attribute a negative connotation to it (Sophie Cranston, “Expatriate as a ‘Good’ Migrant: Thinking Through Skilled International Migrant Categories,” *Population, Space and Place* 23, no. 6 [2017]: 1–12; Anne-Meike Fechter, *Transnational Lives: Expatriates in Indonesia* [England: Ashgate, 2007]). There are cases, however, where migrants expressly enjoy this labelling (ibid., 3–4). Researchers should therefore be cautious because of the nature of their work, as Fechter expresses it pointedly (ibid., 6), “the term ‘expatriate’ is socially contested, politically and morally charged, ambiguous, and is linked to particular notions of ethnicity and class.” Pauline Leonard, *Expatriate Identities in Postcolonial Organizations: Working Whiteness* (Surrey: Ashgate, 2010) criticizes expatriate identities particular to whiteness as a result of post-colonialism. She has deconstructed the concepts of white expatriates and their working lives and considers expatriates as individuals whose identities are defined by boundaries within the space of transnationalism.

¹⁸ Sarah Kunz, “Expatriate, Migrant? The Social Life of Migration Categories and the Polyvalent Mobility of Race,” *Journal of Ethnic and Migration Studies* 46, (2019): 2145–2162.

stages, but the traditional assignment, in terms of nature and duration, is changing, with a diminution of the longer-term assignment in favour of the shorter term.¹⁹

In expert discussions, the category of expatriates is most often defined with respect to four basic attributes. The first two attributes relate to the type of stay abroad and the planned length of stay. In principle, it can be stated that the new residence becomes “the centre of their personal life” for expatriates, but the intended length of stay abroad is planned as short or as long-term, but in any case temporary and not permanent.²⁰ The third attribute takes into account the level of professional or working skills and, as mentioned above, they are usually qualified or highly qualified migrants.²¹ The fourth attribute—the motivation to migrate—is divided into two sub-categories based on it: assigned expatriates²² and self-initiated expatriates.²³ We further use this definition of category of expatriates in quantitative analysis and consider it a sort of “minimal” definition.

The expatriate categorization extends beyond the private sector, with many researchers extending research to the public sector, including government officials, army officers, university educators, etc.²⁴

Phyllis Tharenou²⁵ compares the research methods used in three categories: assigned expatriates, self-initiated expatriates and skilled (im)migrants. They represent different forms of long-term skilled international mobility. A) Assigned expatriates are professionals or managers trained by their organization, which arranges and supports the move and, at the end of a set period (1–5 years), they are usually repatriated back. B) Self-initiated expatriates are professionals or managers who move abroad temporarily at their own initiative to seek work. They move without the support of an organization, usually for over a year. They repatriate, often within a decade. C) Skilled (im)migrants are managers, professionals or technicians who usually hold a tertiary degree or other advanced qualification and move at their own accord from one coun-

¹⁹ Michael J. Morley, Heraty Noreen, and David G. Collings, *New Directions in Expatriate Research* (New York: Palgrave Macmillan, 2006), 3.

²⁰ Michal Gärtner and Dušan Drbohlav, “Akulturace expatriotů v českém prostředí (vyšší manažeři versus „český lid”),” *Český lid* 99, no. 4 (2012): 386. Amanda K. Von Koppenfels, *Migrants or Expatriates? Americans in Europe* (Hampshire: Palgrave Macmillan, 2014), 24. Przytuła, “Migrants, Assigned Expatriates (AE) and Self-initiated Expatriates (SIE),” 104.

²¹ Gärtner and Drbohlav, “Akulturace expatriotů v českém prostředí,” 386. Emanuele Gatti, “Defining the Expat: the Case of High-skilled Migrants in Brussels,” *Brussels Studies* 28, (2009): 13.

²² A so-called traditional expatriate is considered to be an expatriate sent abroad by his employer (mostly a multinational corporation) to take up a job in one of the employer’s branches in the host country and work on a predetermined task. For this type of expatriate, specialized literature has adopted the term assigned (or organizational) expatriates (AEs).

²³ This sub-category appeared in specialized literature for the first time in the late 1990s (Jaime Pérez, Chris Brewster, Vesa Suutari, and Petra De Saá-Pérez, “Expatriation: Traditional Criticisms and International Careers: Introducing the Special Issue,” *Thunderbird International Business Review* 52, no. 4 [2010]: 268) and bears the name “self-initiated expatriate” (Noeleen Doherty, Michael Dickmann, and Timothy Mills, “Exploring the Motives of Company-backed and Self-initiated Expatriates,” *The International Journal of Human Resource Management* 22, no. 3 [2011]: 595–611; Przytuła, “Migrants, Assigned Expatriates [AE] and Self-initiated Expatriates [SIE]; Yvonne McNulty and Chris Brewster, “The Concept of Business Expatriates,” in *Research Handbook of Expatriates*, eds. Yvonne McNulty and Jan Selmer [Cheltenham: Edward Elgar, 2017], 21–60). These expatriates take responsibility for their careers without the direct support of (any) organization and the difference lies in the initiative for the move (Przytuła, “Migrants, Assigned Expatriates [AE] and Self-initiated Expatriates [SIE]).

²⁴ Anne-Meike Fechter, *Transnational Lives: Expatriates in Indonesia* (England: Ashgate, 2007), 2. Przytuła, “Migrants, Assigned Expatriates (AE) and Self-initiated Expatriates (SIE),” 95.

²⁵ Phyllis Tharenou, “Methodological Issues in Expatriate Studies and Future Directions,” in *Research Handbook of Expatriates*, eds. Yvonne McNulty and Jan Selmer (Cheltenham: Edward Elgar, 2018).

try to another, intending to settle over the long-term or permanently. Although this is a fairly simple division, the reality is more complex. It is this text that has become an impetus for our consideration of what category of expatriates we actually work with and what better categorization could be found.

3 Highly Qualified Migration and Expatriates in Brno

More than three fifths of foreigners residing in the South-Moravian Region live in the Brno-City District. This is a relatively high figure indicating that the city is an important place on the immigration map. At the end of 2017, 29,717 foreigners, including those from the EU, lived in Brno; at the end of 2018 there were 31,826 of them. Over the last five years (2014 to 2018), we have been observing an increase in the number of foreigners in the order of hundreds of people. The number of foreigners has been growing steadily since 2013, up until 2018 the number of foreigners increased by more than a quarter—by 28%. Foreigners make up more than 8% of the city's population. The most numerous foreigners living in Brno are citizens from Ukraine, Slovakia and Vietnam. Less than 4% of foreigners were registered in kindergartens in the Brno-město district in the school year 2017/2018, approximately 3% of foreigners in primary schools and 2% of foreigners in secondary schools. At the end of 2017, universities with the place of tuition in the district of Brno-City registered 62,239 students, 21% of whom were foreigners (13,003 persons). The dominant share of the foreign students were citizens of Slovakia (making up three quarters of all foreign students) as well as students with citizenship from Russia and Ukraine. As of March 31, 2017, foreigners from a total of 150 countries were living in the city of Brno. This represents a very varied spectrum of foreigners. The top ten most numerous nationalities in the city of Brno are made up of citizens of four EU countries (Slovakia, Romania, Bulgaria and Poland) and citizens from outside the European Union: Ukraine, Vietnam, Russia, the USA, India and Kazakhstan.

Data on the extent of migration of expatriates, that can be considered a specific subset of highly qualified migration, or a completely autonomous category, can be obtained from three sources: secondary data of the Czech Statistical Office and Labour Office, data maintained by the Brno Expat Centre or our own research. The first two sources offer the opportunity to evaluate data as secondary—in the first case the data is collected by the authorities, in the second the data on clients are sourced from organizations that focus on providing services to those who consider themselves “expatriates.” We also present the results of the secondary analysis of both data sources.

a) Secondary analysis of data sourced from authorities

It is clear from the data of the authorities that foreigners are economically very active. As of December 31, 2016, a total of 35,613 foreign nationals were active on the labour market in Brno.²⁶ The 4,203 foreigners with a business license should also be added to this number. Thus, we can say that at the end of 2016, there were 39,816 legal foreign workers on Brno's labour market. The fact is that the total number of foreigners in the labour market in Brno has been growing rapidly since 2011—mainly due to the increasing number of workers from EU countries. The structure of foreigners in the labour market changed during the economic crisis in 2008. While the number of EU and third-country workers in 2008 was almost equal, currently almost four-fifths of

²⁶ Report on the situation in the regional labour market, implementation of active labour policies (APZ) in 2016 and labour strategies for 2017.

foreigners registered by labour offices are EU or EEA citizens. Thus, the economic recession has, to some extent, caused the arrival of foreigners who do not need a work permit. Almost two-thirds of foreigners on the labour market of Brno are EU, EEA or Swiss citizens.²⁷ Thanks to the fact that Brno is a university city, there is also a growing proportion of highly qualified Slovaks who remain there after graduation. Foreigners work in the city of Brno in highly qualified positions, especially as managers, foreign language teachers and university professors and educators. The education profile of foreigners also points to the presence of a highly qualified workforce: almost one third of all foreigners in Brno have a university degree.

According to data from the Labour Office of the Czech Republic, of the foreigners registered by the Labour Office in the Brno-City District as of December 31, 2017, 8,796 persons hold the highest level of education (including master's and higher). The proportion of those highly educated is thus about a quarter of all registered (25.4%). We cannot interpret the situation by designating, however, all the persons belonging to the category with the highest level of education as expats.

More precise information is provided by one of the most widely used expatriate definition criteria, which is employment in a position requiring high professional qualification. In this respect, the Czech version of the CZ-ISCO international categorization of employment can be used, namely its first three categories: (1) legislators and managers, (2) specialists, (3) technical and professional staff. By December 31, 2017, the number of expats amounted to 13,923. Foreigners from EU countries predominate among expatriates (82%, 11,396 people), more than one tenth of non-EU foreigners do not need permission (11%, 1,561 people) and the remaining 7% are foreigners with a permit (966 people). As of the end of 2017, 4,180 foreigners were registered with the Business Licensing Office in Brno, but it is impossible to tell the percentage of expatriate business people from the available statistics, i.e., foreigners doing business in highly qualified sectors.

By December 31, 2018, the number of expats amounted to 15,584 and by June 30, 2019, the number of expats amounted to 16,082. This means that, according to this figure, less than half of expatriates (40.1%) were working foreigners in Brno.

b) Secondary data analysis of Brno Expat Centre clients

The second source of data is the already mentioned Brno Expat Centre (BEC), which specializes in providing services to expatriates. The Brno Expat Centre (BEC),²⁸ established in 2010 and based in Brno, is an economic instrument of the city of Brno and the South Moravian Region, whose role is to support the interest of foreign investors to relocate their activities to the South Moravian Region and thus to develop strategic economic sectors of the region. It is a project of an advisory centre for assistance to foreign experts, founded by the non-profit organization Brnopolis z. s. BEC is supported by the Strategy Office of the Municipal Office of the City of Brno.

The primary clients of BEC are thus the South Moravian Region, the city of Brno and on the basis of contractual partnerships also foreign investors doing business in certain strategic fields, for whose employees (but not exclusively) BEC provides advisory and assistance services. BEC

²⁷ The largest share of this labour force is attributed to citizens of Slovakia who are most often employed as workers in engineering, construction and agriculture. Moreover, due to the absence of language barriers, they also find opportunities in business, services and healthcare.

²⁸ See <https://www.brnoexpatcentre.eu>.

is a sub-project of the Regional Innovation Strategy of the South Moravian Region²⁹ valid for 2014–2020. According to this strategy, BEC's stated objective is to "provide support to expatriates, i.e., to highly qualified foreigners who work or plan to work in Brno."³⁰ The mission of the organization is: "We help foreigners find a new home in Brno and create an open environment for inclusion in the life of the city." BEC focuses on foreign professionals of creative, managerial or research professions who work and live in Brno or are planning to work in Brno. It provides information and consulting services to this target group, organizes educational events and meetings. They publish articles from foreign contributors on culture and details related to life in Brno on their website and publish monthly newsletters for expats.

Concerning the data on the services provided, between 2010 and March 2018, BEC assisted clients in less than 6,000 cases on a variety of matters. Clients who are employed in the Czech Republic most often work for IBM, AT&T, Red Hat, Honeywell, Lufthansa, Infosys, Masaryk University, Dixons-Pixmania and Kiwi.

The analysis used data collected by BEC on its clients since 2010 until the end of March 2018. This included information from the BEC registration database, information from the database of clients who contact BEC (by email, telephone or in person) with a request to answer a question, or with a request for field assistance. Since its inception until March 2018, almost 4,700 users have registered through the website interface of www.brnoexpatcentre.eu. According to several indicators, this group of registered persons consists mainly of male and female expatriates (including their possible family members) who come to Brno (and possibly its surrounding area) and are interested in the services and information provided by BEC.

Since the foundation of the organization, it has been maintaining two parallel databases—a database of registered users of the BEC site and the database of clients to BEC services. It is apparent that the number of registered users of the BEC website increased only very slowly in the first years. By the end of 2014, the count of registered persons totalled 227. A steeper increase has been apparent since 2015, when around 1,000 persons were registered each year by March 2018, and the final number of users thus stabilized at 3,548. Most registered clients came from EU countries (44%), followed by foreigners from so-called Third Countries—Asia (14%) and Europe outside the EU (14%). In terms of gender, male clients outnumbered women (61%), in terms of age, 25–34 years (54%) prevailed among expatriates, and singles (44%) in terms of family relationships. The highest number of registered persons was in the technology sector of the economy (42%) and at the same time they were the most frequently employed persons (66%). Almost four fifths had no or only a limited knowledge of Czech.

The number of clients using BEC services grew only slowly after the establishment of BEC, but slightly faster than the number of registered users of the site. In the first two years of operations, i.e., 2010–2011, BEC records 101 instances of assistance. The year 2012 was crucial for BEC in terms of the increase in the number of assistances—493 instances of assistance were registered. During 2013–2015, BEC recorded the use of services in almost 2,000 cases and from

²⁹ RIS JMK, "Regionální inovační strategie Jihomoravského kraje 2014–2020," accessed March 20, 2019, <http://www.risjmk.cz/userfiles/file/Region%C3%A1ln%C3%AD%20inova%C4%8Dn%C3%AD%20strategie%20Jihomoravsk%C3%A9ho%20kraje%202014-2020.pdf>.

³⁰ In another document of the South Moravian Region, the *Human Resources Development Strategy of the South Moravian Region 2016–2025*, it is also stated that "for the economy of the region it is [...] important to create conditions for the life of qualified foreign workers," whereby BEC is mentioned as an important player in this respect, which provides institutional support for the integration of such foreign workers (GaREP, "Human Resources Development Strategy of the South Moravian Region 2016–2025," accessed March 18, 2019, <https://www.kr-jihomoravsky.cz/Default.aspx?PubID=310075&TypeID=7>).

2016 until the end of March 2018 in another 3,119 cases. In total, the BEC provided assistance in 5,669 cases throughout its entire existence.

The comparison of the “nationality” structure of BEC website users and BEC website clients demonstrates that this structure is similar, with slight variations. Almost half of the assistance (47%) falls on EU clients, more than half on clients from non-EU European countries (15%) and countries of Asia (13%), North America (12 %), South America (6 %), Africa (4 %) and Australia and Oceania (2 %). Other socio-demographic characteristics (e.g., gender and age) are not monitored by BEC. Clients are most often in contact with BEC via email (70%) and more than a fifth of the contacts are in the form of a personal visit (together with 21% field assistance). Most frequently, BEC clients deal with these issues concerning their stay in the Czech Republic, taxes, health and health insurance, job seeking, family affairs and childcare, issuance of driving licenses, further education (schooling) and business.

When comparing data from both secondary analyses, extrapolation of data from the authorities, according to the characteristics of expatriates, led to the figure of 13,923 persons in 2017, i.e., less than half the proportion among working foreigners.

The limiting factor, however, is the fact that exclusively the professional qualification has become the criterion, which is one of the expatriate criteria, but not the only one. BEC has registered approximately 4.7 thousand clients and provided services in more than 5.6 thousand cases over the course of its existence. It should be noted that these are clients seeking help and contacting the BEC, considering that they are expatriates entitled to the services. “However, this statistic does not tell us the 100% truth about the national composition of ‘highly-skilled’ workers in Brno, but can give us an approximate view of the issue.”³¹ The last possibility to obtain data on the actual fulfilment of the criteria of pertinence to the expatriate category was to conduct our own exploratory research, its presentation and results are discussed in the next chapter of the article.

4 Brno Expats Profile

4.1 Description of the Exploratory Survey—the Great Brno Expat Survey

The data on which we will develop the above-outlined theoretical discussion comes from an online survey entitled *The Great Brno Expat Survey* conducted among people from a country other than the Czech Republic and those who have actual experience with living in the South Moravian Region (hereinafter SMR). The design of the questionnaire survey was created in close cooperation with project partners from the Institute of Religious Studies, Faculty of Arts, Masaryk University and the application guarantor of the project – Brno Expat Centre. The general structure of the questionnaire was based on the findings from interviews and a focus group conducted at the application guarantor. The main topics were set out here, which then constituted the outline of the questionnaire. The individual topics were subsequently saturated with specific questions. Both closed and open questions appeared in the questionnaire. The respondents could choose from one or more options, to respond through assessment scales or with their own words. The questionnaire was divided into several thematic areas – housing, health care, education system, satisfaction with various aspects of life in Brno, cooperation with agencies, insight into

³¹ Kristína Babíková, “The Term ‘Highly-skilled’ Professional and Practical Context,” in XIX. *International Colloquium on Regional Sciences. Collection of Contributions*, eds. Vladimír Žitek and Viktorie Klímová (Brno: Masarykova univerzita, 2016), 420.

public institutions, socio-demographic characteristics and others. The questionnaire contained 122 questions in total, while not every respondent answered all the questions.

The online questionnaire data was collected in October and November 2018 from a link (hyperlink).³² This link was sent out to relevant actors and participants. The online questionnaire was distributed through BEC contacts, social networks, information leaflets and personal links between respondents. It was also helpful to contact employers (who also employ persons from outside the Czech Republic) and universities. The online questionnaire was filled in by 1,013 respondents. Subsequent data analysis was carried out using the IBM SPSS statistical software application. A data matrix was created, after the data was entered, and the logical check of data and its consistency was performed.

The Great Brno Expat Survey was designed to categorize respondents into several categories. In the first case, it was a category that included those who had planned to live/work/reside in the South Moravian Region (SMR) in the past, but eventually did not arrive in Brno or any other South Moravian city. Another category included those who are just planning to arrive in the South Moravian Region and who have never lived/worked/resided in the South Moravian Region. People who fell into these two categories were identified in the initial filter and an original questionnaire was developed for them. The largest and in all probability the most important group of respondents were those who lived/worked/resided in the SMR in the past for more than two months but who do not live/work/reside there any more together with those who currently live/work/reside in SMR for more than two months. For the purposes of this article, we will focus on the group that lived and worked in Brno (Brno-město or Brno-venkov; N = 759) at the time of the survey. Respondents from this category also completed the entire questionnaire, so it would be possible to evaluate all the answers. We will focus, however, only on their socio-demographic characteristics, according to which it will be possible to follow the profile of expatriates in the territory of the city of Brno.

4.2 “Expat” Filter Design

The first chapter described the minimum definition of the term expatriate. We have operationalized the aforementioned theoretical definition by means of several variables. Thus we used a different set of variables for each of the four attributes.

A) The Centre of Personal Life (Life Strategies)

We have reflected this attribute in our data in the form of questions that asked whether the respondents live in Brno and whether they work in Brno. We proceeded from the assumption that the “centre of life” is where the respondent lives and works. These were questions 14a and 14b, for which it was necessary to indicate where the respondents currently live and work:

- *Q14a Please indicate where you currently live:*
We chose answers 1 (I live in Brno-city) and 2 (I live in Brno-country) as relevant.
- *Q14b Please indicate where you currently work:*
We chose answers 1 (I live in Brno-city) and 2 (I live in Brno-country) as relevant.

B) The Temporary Aspect of the Residence

We projected the second attribute in the form of a question about the planned length of stay and the actual length of stay. In the question about the planned length of stay, we assumed that the expatriates would want to stay in Brno for less than three years or that they had no clear idea

³² A tool for creating professional online surveys—Clic4Survey—was used for data collection.

of how long they wanted to stay in Brno.³³ We also filtered out those who had been in Brno for more than three years at the time of the survey.³⁴

– *Q25 How long do you plan to stay in Brno?*

Here we chose answers 2 (Less than 3 months), 3 (Less than 6 months), 4 (Less than 1 year), 5 (Less than 3 years) and 8 (I don't know) as relevant.

– *Q24 How long have you been staying in Brno?*

Here we chose answers 1 (Less than 1 month), 2 (Less than 2 months), 3 (Less than 3 months), 4 (Less than 6 months), 5 (Less than 1 year), 6 (Less than 3 years) a 9 (Less than 14 days) as relevant.

C) Professional or Working Skills

We processed the third attribute with questions about education and job position. In education, we counted on the three highest levels of education (Bachelor's, Master's, Doctoral). In the job position, we subsequently focused on highly qualified workers:

– *Q99 What is the highest level of education you have completed?*

We chose answers 7 (Bachelor's or equivalent), 8 (Master's or equivalent) and 9 (Doctoral or equivalent) as relevant.

– *Q112a In what position are you currently employed?*

Here we chose answers 1 (Manager), 2 (Professional—science, medicine, teaching, business & administration, law, culture, creative professional, religious professional) and 3 (Technician & associate professional) as the relevant ones.

D) The Motivation to Migrate

The third attribute was operationalized by means of the question on the reasons for migration:

– *Q27a Please indicate your reasons for coming to Brno.*

Answer 1 (I came to work) was marked as relevant here. So we chose those who came to Brno primarily for work.

5 Comparison of HQM and Expats

If we compile a profile of expatriates by which we filtered our data, it would be a profile composed of the following characteristics. The following persons are considered expatriates in our survey:

- They work and live in Brno (Brno-city or Brno-country);
- They plan to stay less than three years in Brno, not permanently, or do not know for how long;
- They have not been living in Brno for more than three years;
- They are highly educated and work as professionals or managers;
- They came to Brno primarily for work.

Having applied the filter/profile described above to our data from *The Great Brno Expat Survey*, we found that 112 respondents out of a total of 759 correspond to the minimum theoretical definition of expatriates. Since in this case only about 14.8% of respondents from the whole group

³³ In the question about the planned length of stay it was also possible to check the option—for more than three years but not permanently. See below the discussion about adding this response to the filter.

³⁴ We have determined the notional average length of stay reported by Phyllis Tharenou (Phyllis Tharenou, "Methodological Issues in Expatriate Studies and Future Directions," in *Research Handbook of Expatriates*, eds. Yvonne McNulty and Jan Selmer [Cheltenham: Edward Elgar, 2018], 393–415) for the extent of the assigned expatriate's stay.

responded to our definition, we wondered whether the filter we established was too strict. We have modified the filter parameters with the subsequent observation of the changing numbers of respondents who match the newly set filter.

First we added the option “More than three years but not permanently” to the filter for Q25 *How long do you plan to stay in Brno?* The expatriates in this case would be those who have been working and living in Brno, have come primarily for work, who are highly educated, work as professionals or managers and want to stay in Brno for less than three years, more than three years, but not permanently, or possibly do not know. In this case, a total of 153 respondents passed through the filter.

Furthermore, we excluded from the definition the condition that respondents were not allowed to live in Brno for more than three years at the time of the survey and at the same time the whole question on the planned length of stay. This filter was passed through by 420 respondents. Expatriates in this case would be those who work and live in Brno, come to work, are highly educated and work as professionals or managers. At that moment, however, the minimum definition of expatriates leaves out an important criterion, and that is the planned length of stay.

If we return this variable to our filter, it is apparent that the definition of expatriates, in this case those who work and live in Brno, come to work, are highly educated, work as professionals or managers and plan to stay in Brno within three years, or do not know, is matched by a total of 230 respondents. We have therefore removed the condition that the filter must not include people who have been living in Brno for more than three years. If we add “more than three years but not permanently” to this filter for Q25 *How long do you plan to stay in Brno*, we will have 295 respondents remaining.

From the above-mentioned variations of the “Expat filter” it is apparent that despite the less strictly set filtering, we are always able to capture only a minority of respondents from the entire set. The difference between those who fall within the definition of expatriates and those who fall out of it and who are still highly qualified migrants in Brno raises the question as to whether the application of the expatriate concept is meaningful to the studied local context at all, as it is a less represented category in the social reality compared to what was expected. In this case, it is legitimate to start looking for more suitable categories.

6 A New Typology: Beyond the Borders of Expatriates

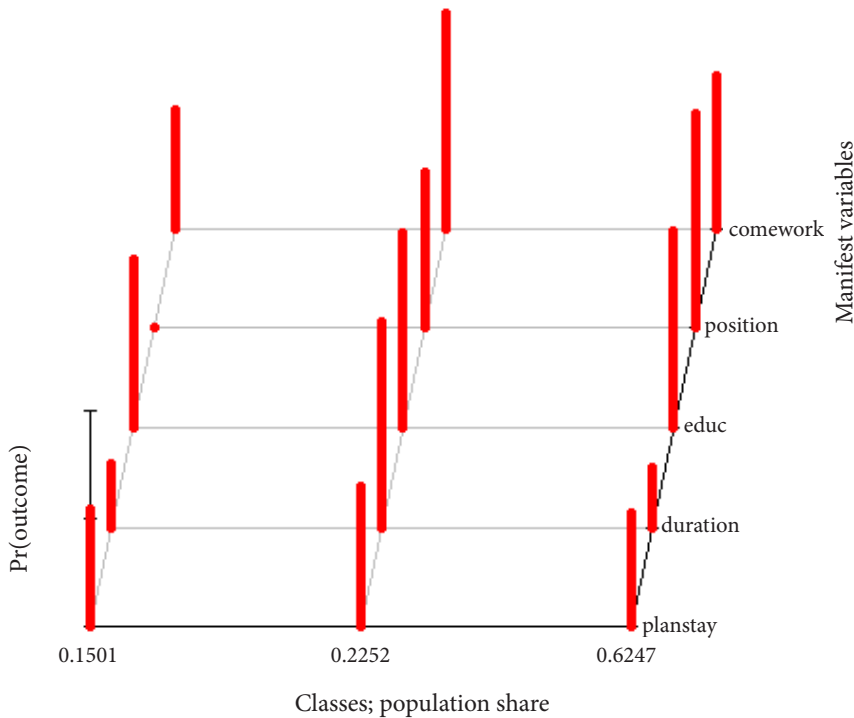
Therefore, if there is only a very small number of respondents in our sample who, even with a less strict filter, correspond to the theoretical definition of expats, then the question arises as to whether there are any other forms of classification of our sample (observed cases) than the classification into expatriates and highly qualified migrants. We used latent class analysis to be able to answer this question. We first checked the functionality of the existing definition, and finally searched for a new, more suitable typology.

6.1 Analysis of Latent Classes: Verification of the Functionality of the Definition of “Expatriates”

We initially used the analysis of latent classes for the variables that we used to operationalize the minimum theoretical definition of the concept of “expat” to verify the correctness of our assumptions (see the previous chapter). The analysis included respondents residing and working in Brno (city and country). The variables were dichotomized according to the following key: 2 = category corresponding to the definition; 1 = others. 759 cases were included in the analysis.

The analysis of latent classes (for 2–4 classes) was applied to key variables (duration of stay, planned duration of stay, education, job position and reason for migration). Three classes emerged thereof as analytically suitable (see Chart 1).

Chart 1: Analysis of Latent Classes, Solution 1



The first latency class with a size of 13% ($N = 99$) included respondents that were more likely to work in less qualified positions in services. It is clear from Chart 1 that the respondents included in the first class (the first vertical axis on the left) cannot be considered expatriates. This is indicated by the low values of the variables, i.e., the planned lengths of stay (planstay), the working position (position) and the actual length of stay (duration). The other values for education (educ) and the reason for migration (comework) are also not high.

In the second class (25.6%; $N = 194$), individuals who would meet the definition of expatriate were clustered—they worked in highly qualified positions, receiving high wages, stayed in Brno for less than three years and were likely to stay in Brno for not more than three years, or have not yet decided in this respect. Figure 1 shows that in almost all categories the respondents in this class are more likely to report values in accordance with the theoretical definition.

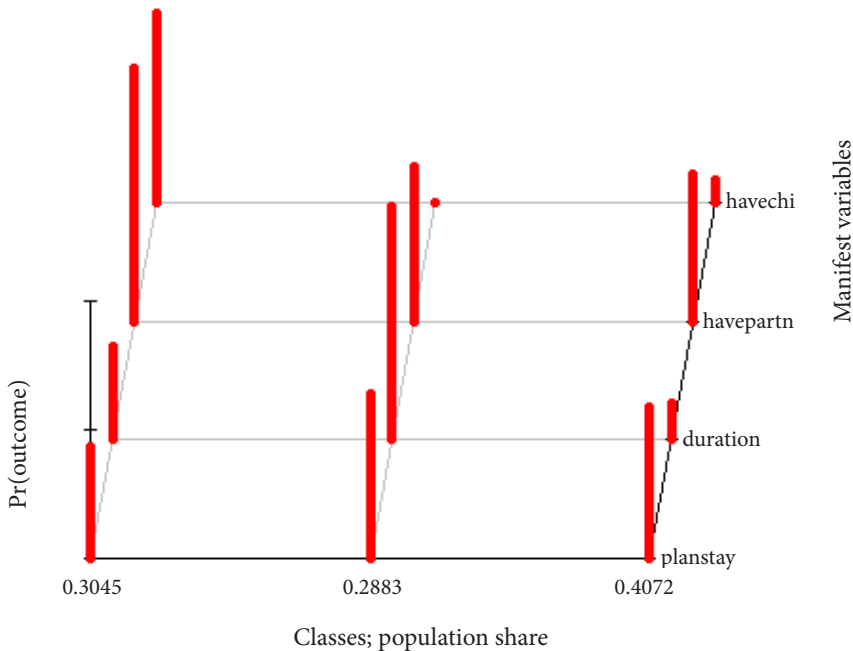
The third class (61.4%; $N = 466$) includes respondents who would rather correspond to skilled (im)migrants, as Phyllis Tharena (2018) labelled them. They are much more likely to live in Brno for a longer period of time (half of them living in Brno for more than five years) and would also like to stay in the city for more than three years and often even permanently. They share other characteristics with class number two. Figure 1 shows that they show high values for education (educ), job position (position) and reasons for migration (comework), while with the duration (duration) and the planned length of stay (planstay) they are unlikely to correspond to the theoretical definition of expatriates.

What do these results imply? We came to the same findings as in the previous section, when we found that approximately 15% of respondents in our sample met the definition of expatriates. At the same time, they were supposed to be respondents who declared belonging to the expatriate category at the very beginning. They were thus addressed by the questionnaire. It turned out that the solution is not to start loosening the definition and adjusting the filter settings in the questionnaire. Even the analysis of latent classes indicated that relatively few respondents appear in the category that is in line with the definition of “Expatriate”—approximately a quarter (25.6%). The less qualified category seems to be aspiring to be referred to as expatriates, while the skilled (im)migrants category points to the trend of more permanent forms of dwelling in the city, which is contrary to the expected short-term residence. We therefore decided to move forward in the analysis and propose our own solution—a typology that would be more in line with reality.

6.2 Analysis of Latent Classes: a Typology According to Social Links and Length of Stay

The original typology based on the theoretical definition was not appropriate, mainly due to the low variability of the variables – education (educ), job position (position and reasons for migration (comework)). In other words, the majority of highly qualified, educated and employed respondents appeared in the cohort. They work predominantly in high positions (managers, professionals, technical professionals) and came to Brno primarily to work. A compelling typology cannot be created, however, from these variables. We therefore further applied the latent class analysis to all the socio-demographic data. The analysis showed that analytically suitable latent classes would appear when using the following variables: length of stay, planned length of stay, and relationship-related variables—whether the respondents have partners and whether they have children. The analysis revealed a total of three groups (latent classes), which were defined in a different way than on the basis of the definition of expatriates. What types are these?

Chart 2: Analysis of Latent Classes, Solution 2



Type 1 – Expatriates with links to close persons

The first latent class, which includes less than a quarter of respondents (24%; N = 182), is characterized by the fact that respondents are more likely to stay in Brno for a shorter period of time. They also show lower values in terms of staying in the city in the future (compared to other classes). They consequently construct their stay as temporary and short-term. Almost everyone in this group, however, has partners (99%) and all have at least one child. They manifest personal ties to close persons. Again, almost all in this group are employed (93%), working in positions requiring high qualification and approximately a third (32%) of them are women.

The results are shown in Chart 2. The first vertical axis represents the first latent class, for which we observe low values in the first two columns—the planned length of stay (planstay) and the actual duration (duration). In contrast, the highest values (in comparison with other classes) are recorded in the columns representing the presence of a partner (havepartn) and children (havechi).

Type 2 – Expatriates without children

In the second latent class there are people, constituting more than a third of the sample (34.5%, N = 262), whose most notable feature is that they do not have children. More than three fifths of the respondents have a partner (63%). Almost all of this group stay in Brno for a short time – for up to three years (99%) and they least often want to stay in Brno permanently. Generally they intend to stay in Brno for a shorter time. This group is on average younger than others and is represented by approximately two fifths by women (41%).

Thus, the absence of a column representing the presence of children (havechi) can be seen most clearly in Chart 2 (second vertical axis). In partners (havepartn), we note high figures, which is also the case for the duration of the stay (duration) and the planned length of the stay (planstay). In these cases, however, high values represent a high probability of a shorter residence or planning of a shorter residence time in Brno.

Type 3 – Skilled (im)migrants with partners

The third group contains more than two fifths of respondents (41.5%; N = 315). They are characterized by the fact that they usually do not have children (only 4% have children), but three fifths (60%) of them are highly likely to have a partner. Almost all of this group (99.7%) stay in Brno for more than three years (of which 58% longer than five years and 41% longer than three years but less than five years). These respondents plan to stay permanently (31%) in the city, or do not have a clear timeframe for staying—this applies to almost half of them (45%), which is most in comparison with other groups. More than a third of people in the group (37%) are women.

Chart 2 shows the almost imperceptible column indicating the presence of children (havechi) and the actual length of stay (duration) in this case representing long-term residence in Brno. In the column of partners, we note high values (havepartn) and the column representing the planned length of stay (planstay) is only slightly smaller than in the second latent class.

7 Conclusion

The text responds to the fact that we as researchers have noticed the overuse of the “expatriate” designation and were challenged by this common use of the widely used designation “Expats,” which is accepted without theoretical reflection and has become a designation for all qualified migrants in Brno. This has led us to a question as to whether it makes sense to use the category of expatriates at all and whether it is identifiable in social reality on the basis of the definition

features present. Data from secondary analyses suggested that the category of expatriates should be abundantly represented in Brno – extrapolation of data from authorities according to the characteristics of expatriates led to the figure of 13,923 persons in 2017 and 15,584 persons in 2018, so that less than every second working foreigner should be an expatriate. The limiting factor, however, is the fact that exclusively the professional qualification has become the criterion, which is one of the expatriate criteria, but not the only one. The statistical definitions take into account the educational profile and qualification framework quite selectively, so the resulting figure suggests that Brno is likely to be a city where both expatriates (but without distinction between assigned expatriates and self-initiated expatriates) and skilled (im)migrants are represented. The Brno Expat Centre (BEC), which is the exclusive provider of services for expatriates in the city, has provided services to more than 5.6 thousand foreigners who have labelled themselves as expatriates. It is evident that even this information on the present phenomenon is not comprehensive, but indicates the number of those who found information about the services provided and subsequently used them. Many did not have to find their way to services, did not need them, did not identify themselves as expatriates, or did not follow this label. The functional definition of BEC clients did not act according to theoretical criteria but according to experience and practical needs.³⁵ The exploratory research itself and the effort to exclude “real” expatriates from its broad framework resulted in the finding that only 15% of respondents in our sample meet the definition of expatriates. At the same time, they were supposed to be respondents who declared belonging to the expatriate category at the very beginning. It turned out that the solution is not to start loosening the definition and adjusting the filter settings in the questionnaire. The subsequent analysis of latent classes showed that relatively few respondents appear in the category that is in line with the definition of “Expat” – approximately only a quarter (25.6%). Our expectations were much higher. What could we say about the remaining three quarters of respondents? It turned out to be composed of two categories. The less qualified category seemed to be aspiring to be referred to as expatriates (destigmatization), while the skilled (im)migrants category pointed to the trend of more permanent forms of dwelling in the city, which is contrary to the expected short-term residence in expatriates. We therefore decided to propose our own solution—a typology that would be more in line with reality.

As a result, we most closely approximated the classification proposed by Phyllis Tharenou,³⁶ who, based on the research methods, used three categories: assigned expatriates, self-initiated expatriates and skilled (im)migrants. What we have in common is that the categories of expatriates and skilled (im)migrants face one other. We differ, however, in the specification of expatriates distribution, because it is not important for us who initiates their movement, but that the importance and nature of the social ties come forward to the fore. The same applies to skilled (im)migrants. In our categorization, the overall emphasis is not only on the external circumstances of coming to the city but also on the effects of social relations and personal social networks. Analysis of latent classes indicated three basic types. The first two correspond to the concept of expatriates, especially in the criterion of a probable short-term stay, but actually the importance of social ties has proved to be true. Expatriates with ties to close persons are experts who have partners and at least one child and manifest personal ties to close persons. Another category are expatriates without children, with frequent ties to the partner. There is, however, a type of skilled (im)migrant with partners who usually have no children but most likely have a partner. They differ from the previous two in that they plan their stay as permanent or do not have a clear

³⁵ Daniel Topinka, Petr Lang, Olga Čejková, and Michaela Ondrašínová, “Skilled Labour Migration: A Proposal of the Conceptual Framework for the Study of Expatriates in Brno,” *Lidé města / Urban People* 20, no. 2 (2018).

³⁶ Tharenou, “Methodological Issues in Expatriate Studies and Future Directions.”

timeframe for staying in the city. Although it is a typology that appears with some degree of probability, it is much more functional in view of the varied and colourful social reality. It takes into account not only the length of stay but also the social links. The importance of establishing networks of interpersonal relationships affecting lifestyles and strategies has been confirmed,³⁷ but at the same time we do not find grounds for a simple claim that the birth of a child changes the path of an expatriate, who then turns into a long-term skilled (im)migrant.

We cannot accept the categorization as definitive, but it is important to take into account the time period and context of creation. There is a need to realize that in all spheres of human activity and life, Brno has undergone fundamental changes since 1989. Over the following 30 years, social and economic development has made the second largest city of the Czech Republic a centre of innovation, research and education. Brno has become an attractive place for many foreign investors and companies. Thanks to job opportunities, a developing infrastructure, the transformation of the labour market, education, investment and the cultural potential, the city is gradually opening itself to the outside world. Brno has attracted foreign entrepreneurs, investors and highly skilled workers. It has become an international and cosmopolitan city, a city that is constantly evolving, dynamic and innovative. The urban economy has grown, attracting new investment and gradually creating good conditions for highly skilled workers, increasing the overall quality of life in the city. Our categorization was developed at a time when the city is offering beneficial conditions in many ways, is still developing economically, demands foreign labour and absorbs a considerable amount of highly skilled (im)migrants. There are many effects of attraction and life strategies which are affected by the multiplication of favourable circumstances and fundamentally changes them. The question is whether the categorization change causes a slowdown in economic growth or a deterioration in the quality of life in the city.

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³⁷ Topinka and Janků, *Cizinci v Brně. Vztahy, vazby a síť podpory*.

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Raising the Effectiveness of Conservation Programs: A Case Study of TKCP Environmental and Developmental Activities in the YUS Area, PNG¹

Abstract | The Tree Kangaroo Conservation Program (TKCP) is a conservation program run by the Woodland Park Zoo. It began in Papua New Guinea (PNG) in 2009, but conservation efforts in this area can be tracked back to 1996, when Dr. Lisa Dabek began her conservation research study. TKCP is mainly focused on the protection of the endangered Matschie's tree kangaroo. Since 97% of the land is owned by indigenous landowners in PNG, it also cooperates with the local communities. Part of the program's efforts are therefore aimed at the improvement of the local standard of living in the YUS conservation area (YUS CA). Based on a review of TKCP annual reports and on data conducted during the field research in Yawan and Kotet villages in PNG via participatory observation and interviews with the locals, this article's aim is to describe some of the TKCP's developmental efforts in the YUS CA. Since there has been an ongoing debate addressing the issue of effectiveness of conservation programs in PNG and elsewhere in the world, it also discusses some of the main criticism of environmental efforts in relation to local communities.

Keywords | Conservation – Nature protection – Ethnography – Tree Kangaroo Conservation Program – Papua New Guinea

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1 Introduction

The world today is dealing with many great crises. One of the severest is undoubtedly the environmental. Every single day, the Internet and social networks are bursting of news addressing the issue of global warming, unsustainable clearing of primal tropical forests and the climate change on natural ecosystems and human societies. The modern conservation movement is on the peak, fighting, among other goals, to save the planet. This is not surprising. Climate change, if it continues with the same pace, will severely affect not only existing animal and plant species, but might also “significantly impact the extreme poverty and development by 2030.”² Environmental and developmental issues are closely related. If the environmental crisis could be stopped or at least moderated, it can positively effect the consequences of world poverty. Conservation

¹ The paper was supported by the Czech Ministry of Education grant IGA_FF_2018_023 (Social sciences 2018).

² Hallegate et al. *The Impacts of Climate Change on Poverty in 2030 and the Potential from Rapid, Inclusive, and Climate-informed Development* (2017), 451.

programs, an instrument used by conservationists to effectively protect the environment, could be a perfect solution in this way. Many (if not all) conservation programs incorporate developmental aspects into their nature protection plans and adjust their environmental efforts according to the needs of the nature and people inhabiting these areas. There has been ongoing criticism, however, of the environmental efforts in relation to their impact on the lives of local communities. In worse cases, local people have been relocated for the sake of nature protection.³ In other cases, misunderstandings and discrepancies in expectations from both sides have led to local communities withdrawing from the project.

It is not easy to start and successfully run a conservation project anywhere in the world. Conservationists face many problems, including funding, the socio-cultural context of the area alongside negotiations with local communities, and legal issues including the politics of the host country. Only a small number of conservation projects at present actually involve anthropologists assisting in meetings, talking with local communities and addressing the needs and expectations of locals. Villagers are much more frequently provided with social and development programs, addressing the needs projected on them by conservationists, often not corresponding with their actual needs and desires.⁴

When I first came to PNG, the aim of my research was to observe the mechanisms that determine the success or failure of conservation efforts there. I focused my research attention on the Tree Kangaroo conservation program (TKCP). After my first research stay in Yawan and Kotet villages in PNG in 2018, however, I realized there other important issues to observe in this area. I became interested in the relationship between conservation and business. I found that local communities tend to view conservation efforts as an opportunity for economic and technological development of their villages. TKCP provides, as I will demonstrate later in this article, many benefits to participating local communities. Yet I observed a strong sense of disappointment among locals from Yawan and Kotet, a scenario observed by other researchers far too often as well.⁵

This article aims at a critique of the failures and non-effective application of conservation efforts. I also address the specifics of conservation in Papua New Guinea and some obstacles that conservation workers might meet when starting a conservation program there. I will provide some evidence supporting the importance of natural protection in PNG. The core of my article, however, is an elaboration of Vojtěch Novotný's idea of "conservation as service as any other,"⁶ which I support with my own research data. The conservationists in PNG often do not provide the locals with "anything else" than social (development) programs and various other services in exchange for their forests and land. It might seem enough, but in underdeveloped countries there is, quite naturally, a search for monetary or business compensation as well. This often causes a huge clash of expectations, which often results in a shutdown of the entire conservation program.

I deeply believe that environmental and conservation efforts are a necessary tool for all sustainable future scenarios of a human kind. They are essential for the survival of the natural

³ Compare with Richard Reed, "Two Rights Make A Wrong: Indigenous Peoples vs. Environmental Protection Agencies," in *Applying Cultural Anthropology: An Introductory Reader*, eds. Aron Podolefsky and Peter J. Brown (Houston: Mayfield Publishing Co., 2001), 92–99.

⁴ Compare to Paige West, *Conservation Is Our Government Now: The Politics of Ecology in Papua New Guinea* (Durham and London: Duke University Press, 2006).

⁵ Robert Fisher, *Conservation and Poverty – Landscapes, People and Power* (Gland, Switzerland and Cambridge, UK: The World Conservation Union, 2005).

⁶ Vojtěch Novotný, "Rain Forest Conservation in a Tribal World: Why Forest Dwellers Prefer Loggers to Conservationists," *Biotropica* 42, no. 5 (2010): 546–549.

environment as whole. Therefore, a great deal of care and attention must be given to their implementation. Another great potential is that they can be an alternative source of sustainable livelihood in rural communities, especially in remote, hardly accessible areas.

2 Conservation in PNG: an Important Step for the Future?

PNG disposes of an incredible diversity of species, landscapes and ecosystems. In their article from 2008, Mittermeier et al. refer to numbers showing that it represents, alongside with some parts of the southern Guianas, southern Venezuela, parts of upper Amazonia Brazil and some other regions, around 5% of the original extent of the high-biodiversity terrestrial ecosystems in the tropics. This makes it an unequivocal focus of environmental biologists from all over the world. PNG forests are, after the Amazon and Congo, the third largest in the world and cover about 28.2 million hectares.⁷ The terrain is full of extremes: rain forests, high mountains with extensive areas above 3,000 m above sea level, wetlands and savanna-woodlands. The coastline consists of 8,000 km of mangrove swamps, lagoons, coral reefs and islands. The waters are among the richest marine diversities in the world. Its coral reefs are home to 10% of the world's total fish species.⁸ According to the Timber trade portal, the land is covered by approximately 33.6 million hectares of forest land. That is 72.5% of the total land area and almost all of it is primary forest. Around 1.45 million hectares of this land is protected.⁹

Papua New Guinea also belongs to one of the poorest and most isolated regions in the world.¹⁰ Although the country disposes of great agricultural and forestry reserves, its development is still in its early stages. Nevertheless, the forest industry plays an important role in the local economy. Based on Ian Craven's data¹¹ timber is one of the major economical resources for Malaysian and Chinese commercial interests in the Asia-Pacific region. It is no surprise that this has been the greatest cause of forest loss for more than twenty years. According to Shearman et. al., about 15% of PNG's primary rain forest was logged between the years 1972 and 2002 and still at present, commercial logging is one of the major causes of forest degradation in PNG.¹²

The main reason is poorly formulated legislation.¹³ This enables multinational companies, such as CRA or Chevron, to operate in the country, with their cooperation with the PNG government contributing massively to the problem of deforestation. Local landowners are encouraged to establish landowner associations and these cooperate with multinational companies. The government negotiates with the local landowners, but with a strong emphasis on its own interests

⁷ Russell A. Mittermeier, Norman Myers, Jorgen B. Thomsen, Gustavo A. B. Da Fonseca, Silvio Olivieri, "Biodiversity Hotspots and Major Tropical Wilderness Areas: Approaches to Setting Conservation Priorities," *Conservation Biology* 12, no. 3 (2008): 516–520.

⁸ Papua New Guinea's Fourth National Report to the Convention on Biological Diversity (2010), 10.

⁹ "Papua New Guinea," Timber Trade Portal, accessed April 28, 2019, <http://www.timbertradeportal.com/countries/papua-new-guinea/>.

¹⁰ Devesh Rasgotra, "Papua New Guinea is falling short of its potential," *Global Risk Insights*, accessed April 28, 2019, <https://globalriskinsights.com/2015/11/papua-new-guinea-is-falling-short-of-its-potential/>.

¹¹ "Taking down the giants," *World Wide Fund For Nature*, accessed April 28, 2019, http://wwf.panda.org/knowledge_hub/where_we_work/new_guinea_forests/problems_forests_new_guinea/deforestation_forests_new_guinea/logging_forests_new_guinea/.

¹² Phil L. Shearman, Julian Ash, Brendan Mackey, Jane E. Bryan, and Barbara Lokes, "Forest Conversion and Degradation in Papua New Guinea 1972–2002," *Biotropica* 41, no. 3 (2009): 379.

¹³ "Papua New Guinea," Timber Trade Portal.

and the interests of the companies. Thus, the government contributes to selling PNG natural resources under the prospect of fast, but also short-term and short-sighted gain.¹⁴

This means a massive problem for the future. The loss of forest resources, which provide livelihood to more than a billion people, forces them (among other variables) to live in extreme poverty. The environmental challenges of the extensive logging are fires, landslides and floods. Many critically endangered species are driven to the brink of extinction. The social challenges of such a situation are that affected communities have to search for illegal ways to make their own living. Local communities living within remote rain forest areas with limited access are highly dependent on the land and the forest, which often serve as a supply for firewood, food, housing material, etc. Difficult access to markets or other ways to make a living could mean severe obstacles in finding resources that could replace life patterns based on the utilization of the forest and the land.¹⁵

In such a situation, an efficient conservation program can be a beneficial instrument for all. It can mean protection of an endangered environment and also an opportunity to make a living for locals. This means it needs to carefully address the needs and expectations of both sides: conservationists and local communities.

Conservation attempts in PNG began during the colonial era with an effort to establish national parks. There has been, however, a great deal of resistance preventing them from developing in larger numbers. As mentioned earlier, 97% of the land in Papua New Guinea is owned by local landowners. No land activity can go forward without gaining the consent of local communities: a process that can take time and money and that can bring many additional obstacles. Particularly in the case of the establishment of national parks, another important variable contributes to the difficulties surrounding negotiations over local community's agreement. National parks restrict people from using any natural resources. Such legislation can mean, however, on the social level the very same problem as extensive logging impacts. If the locals do not have access to their land, they might be forced to leave the area. Fisher working with the data of McLean and Straedes (2003) and Brockingtons (2003)¹⁶ demonstrates this with cases when people were resettled to another location in order to protect the land. The most problematic side of such practices is very little evidence of any adequate compensation that would provide them with alternative sustainable livelihoods. This is not the case of Papua New Guinea and currently, there are only two national parks in the country.

Another model of nature protection is wildlife management area (WMA). They are the most frequently used legal structure for protected land in PNG today. They are legally enshrined under the 1966 Fauna act, which does not provide effective regulations of logging and mining within the protected areas. The main goal of WMA is to protect endangered species, but they also allow local landowners to use resources to some extent. They also participate with locals in the decision-making process over land management. Some effective changes were finally brought by the Conservation Areas Act of 1982, which provided better legal protection by placing a greater amount of responsibility with the Environment Minister, who has to authorize any development activity within the established conservation area (CA), the third model of nature protection used in PNG. CAs have similar aims as national parks and WMAs but put far greater emphasis on the decisions of locals, who are not required to give up their land for purposes of

¹⁴ David Minkow, Colleen Murphy-Dunning, "Pillage in the Pacific: Assault on Papua New Guinea," *Multi-national Monitor* 14, no. 6 (1992).

¹⁵ Julian Newman, Sam Lawson, *The Last Frontier: Illegal Logging in Papua and China's Massive Timber Theft* (London: The Environmental Investigation Agency, 2005).

¹⁶ Fisher, *Conservation and Poverty*, 10.

conservation. They are also much more effective for biodiversity protection since they restrict all types of natural resource extraction.¹⁷

A special workshop held in Madang in April 1992. The purpose of this workshop was to enhance and make the conservation attempts and strategies more effective. The major topics of discussion were the current status of biodiversity, creation and promotion of dialogue between conservationists, landowners and the government and a discussion about culturally appropriate forms of biodiversity conservation. The result of the CNA workshop (Conservation Need Assessment) was a set of recommendations on strategies for sustainable development and conservation of PNG natural wealth.¹⁸

3 Between Environmentalism and Development: The Tree Kangaroo Conservation Program and the YUS CA

TKCP is an international community-based program run by the Woodland Park Zoo in Seattle, Washington, and works in partnership with Conservation International in the USA and PNG. It is the main initiative of the YUS conservation area. It began in 1996 with the initial aim of setting up the first, and until the present the only, nationally-recognized conservation area, the YUS CA, that would provide protection of the endangered Matschie's tree kangaroo. It consequently became a platform for protecting other endemic species that can be found on the Huon Peninsula.

The YUS CA was finally started in 2009 and was created through discussion between the conservation biologists and the local landowners. The story of its beginnings is rather interesting. The local landowner, Mr. Dono Ogate claims that he contacted Lisa Dabek, an American biologist who was focused on the study of the tree kangaroos in 1997. He invited her to study the population in the forests surrounding the Yawan village. She and her research team arrived in 2002 and immediately began to observe the animals. Consequently, several organizations were included in order to obtain financial support needed to establish a conservation area. They proceeded to obtain the consent of the local communities demanded by the customary laws in PNG. Since Dono's family mainly operates in the area surrounding the Towet village, this community was the first one to enter the agreements. Dono was then able to arrange meetings with 35 more communities within the contemporary YUS CA. The negotiations did not always go well and sometimes villagers forced him away, even threatening his life. The agreement was finally settled and the YUS CA could start.¹⁹

Its boundaries follow three rivers: Yopno, Uruwa and Som. It covers 760 km² of grasslands, forests, 51 villages and gardens. No large-scale commercial development can be found in the area due to the remoteness. There are no large roads and all transport takes place via plane or by feet or boat. Six airstrips serve for delivery of goods and transport of people, but it is an expensive way of travelling for locals. TKCP also created different employment opportunities for locals (such as research assistants, rangers and mapping officers). As an initiative of YUS CA, it also closely works with village landowners within the area, university students in PNG, government officials and NGOs.²⁰

¹⁷ Bruce B. Beehler, Angela J. Kirkman, *Lessons Learned from the Field: Achieving Conservation Success in Papua New Guinea* (Arlington: Conservation International, 2013).

¹⁸ J. F. Swartzendruber, *Papua New Guinea Conservation Needs Assessment* (Landover, Maryland: Corporate Press, Inc., 1993).

¹⁹ Personal communication with Dono Ogate, July 2018.

²⁰ *Tree Kangaroo Conservation Program Annual Field Report* (Seattle: Woodland Park Zoo, 2005).

4 Expectations Versus Reality: Obstacles of Conservation in PNG

The impenetrable terrain in PNG has thus far prevented the loss of the rich biodiversity. The population density is very low (around 6.2 people/km²) which means that permanent communities occupy only around 6% of the landscape. This has not only created a perfect opportunity to conserve large ecological communities, but also played a major role in hindering village development. The remoteness of the area means limited access to markets, service, healthcare and education for local communities. According to Novotný,²¹ limited development opportunities tend to trigger the fast enthusiasm of local communities when it comes to novelties. Once the locality opens up to western markets (mainly via logging, mining etc.) the locals prefer to participate, instead of supporting the conservation attempts. This is due to the direct profit that comes with the land selling. How should, however, conservation programs deal with this?

Since its beginnings, TKCP has emphasized that they will not give any monetary compensation for the land provided from locals for the purposes of conservation. Instead, it intended to provide employment opportunities and address the local need of education and better healthcare.²² Could this be an effective means of implementing the conservation efforts?

Based on data collected during the research in Yawan and Kotet villages in July 2018, I would argue that it is not enough. During my month stay in PNG, I was able to conduct 50 semi-structured interviews among people from both villages and 2 interviews with the TKCP staff. Although locals understood that TKCP can be potentially beneficial to them, and they welcomed the project's activities, they expected more outcomes from it. Their greatest expectations were more business propositions. Locals basically perceived TKCP as a means to enter western markets and experience the comforts of western life.

This is not surprising since the area belongs among one of the remotest in Papua New Guinea. Reaching the closest town of Lae means a five-day journey by foot. And due to the impenetrable terrain, the passage is possible only a few months during the year. The best way to get there is by a small plane, which is too expensive for most of the locals. Local communities have been, however, in frequent contact with the “western world” ever since 1920.²³ When asked about their attitudes towards nature conservation and their expectations for the future, most of the villagers were disappointed with the TKCP outcomes. They expected to be more involved in program activities: on a material level, they talked, for example, about permanent buildings for the school, the footbridge and better access to drinking water, these things being part of the TKCP development plans for 2016–2020. On a symbolic level, they felt they were not being treated as equal partners for the project. They wanted to be involved in the planning process, make decisions about TKCP activities and have their needs and expectations addressed. They also had a clear prospect of active business which can technologically develop the area.

Remote communities are often seen at present as “ecologically noble savages” disposing of the naturally inherited understanding for and special relationship with their environment. The natural environment is also seen as “a last frontier” and the ultimate wilderness parted of any human activities is a foundation stone of the modern environmental movement. Evidence proves this idea to be very wrong.²⁴ Navjot works with information from Gomez-Kompa and Kaus

²¹ Novotný, “Rain Forest Conservation in a Tribal World.”

²² Bruce B. Beehler, Angela J. Kirkman, *Lessons Learned from the Field: Achieving Conservation Success in Papua New Guinea* (Arlington: Conservation International, 2013), 27.

²³ J. Grúzová, “Culture Change in Local Cultures of Papua New Guinea” (PhD diss., 2015), 69.

²⁴ Navjot S. Sodhi and Paul R. Ehrlich, *Conservation Biology for All* (New York: Oxford University Press, 2010).

(1992),²⁵ who claim that archaeological findings suggest that almost every part of the world was in fact inhabited and modified by indigenous people.

Novotný provides a similar idea. He works with data from Oates (1999)²⁶ and claims that whenever “traditional” societies had the opportunity for development they tended to capitalize their natural systems. Clearly, this cannot be said in general, but it is definitely the case in PNG. He also claims that conservation is in some way a service as any other.²⁷ I would like to say it is also, at least in some way, a business as any other. Conservation programs have great potential to provide locals with job opportunities, development and better access to many services. In PNG, “white people,” were always seen as the ones disposing of goods and material wealth seemingly coming out of nowhere. This creates a great deal of expectations on the side of locals, well known as *cargo mentality*. Conservationists are well aware of this phenomena and try to avoid raising the hopes of locals for something they are not able to provide.²⁸

In my experience, this can be one of the weak spots of any conservation program. It is not enough to clarify the expectations of both sides at the beginning of any program. Local communities need to feel that they are viewed as a serious partner. And if there cannot be any monetary compensation for their land, they still need to be continuously and actively involved in the program. The most important thing here is not only to involve them but ensure that they feel involved.

Many conservation projects also tend to fail due to the application of unrealistic expectations which often do not correspond with the specific local situation. Paige West (2006)²⁹ writes about a “production of locality” that happens in such cases. She understands it as a set of processes creating control of and representing space for a social reality. To understand these mechanisms is crucial because it means to understand discursive practices and impacts of conservation as a means of development in PNG. She adds that environmental interventions in PNG (or anywhere else) are often not just acts of conservation, but are also complex processes of social engineering, including the connection between fundamental terms of social relationships and the environment.³⁰ Based on the review of literature addressing the connection between environmental efforts and anthropology research, I have come to the conclusion that including social research into the nature protection process could be an option. West writes about a similar phenomenon. She describes in her book “Conservation is Our Government Now: The Politics of Ecology in Papua New Guinea” the interaction between the employees of NGOs responsible for the Crater Mountain project and the local community of Gimi people that live in the woods surrounding the area. She found out that over the course of the project there were certain discrepancies between the ideas and aims of NGO workers and the local community. The most important aspect of her work is that she was able to demonstrate the unique capacities of ethnography in understanding and clarifying these processes.³¹ Ethnography and other anthropology designs can be useful in understanding a specific local situation. The role of an anthropologist involved in the conservation project is rather simple: to understand the specific needs and expectations of both sides and be able to mediate their wishes and aims.

²⁵ Ibid., 268–269.

²⁶ Novotný, “Rain Forest Conservation in a Tribal World.”

²⁷ Ibid.

²⁸ Beehler, Kirkman, “Lessons Learned from the Field,” 27.

²⁹ P. West, *Conservation is our Government Now. The Politics of Ecology in Papua New Guinea* (Durham and London: Duke University Press, 2006).

³⁰ Ibid.

³¹ Ibid.

Even conservationists are very much aware of this kind of problem. The series “Lessons learned from the field” underlined the greatest limits and potential risks of the implementation of conservation programs all over the world.³²

As mentioned earlier, TKCP itself tries to react to local needs by starting a range of development and business activities. They perform extensive healthcare and educational procedures and run a coffee business which involves all the families from around the YUS conservation area.³³ It tries to manage both: nature protection and the needs of the locals living in the area. The danger I observed in the field might be that locals do not interpret its role, aims and capacities correctly.

5 Conclusion

A conservation program is an effective and useful tool when it comes to protection of biodiversity and environment. When it comes, however, to areas already inhabited by people, it needs to be operated with deep respect towards the needs of local communities. It is therefore highly important to properly understand all the specifics of the local situation and integrate them into the project.

Anthropological research conducted before the start of environmental interventions can provide useful data, which can serve as the basis for successful cooperation with the locals. The role of a social scientist can be one of a mediator, creating a communication bridge between both (or multiple) actors of the conservation process. Nevertheless, if any nature protection interventions are to be successful, they need to be able to properly react to the locals’ expectations and hopes for the future. They should also be able to provide business opportunities (or other means of monetary compensation) for the people in the chosen locality. Lastly, conservationists need to be able to effectively communicate their own expectations and limits and ensure that locals truly understand the process of the project.

TKCP itself attempts to react to local needs by incorporating developmental activities within its nature protection aims. It is not an easy task but it might be a way to balance the need for protecting biodiversity and offer compensation to local communities as well. Based on my own data, however, it is still a work in process in Yawan and Kotet villages.

There is still a strong need for further research, since I went to PNG in 2018 and was only able to visit 2 villages in YUS CA. There are around 49 more and it is possible that data from other villages can alter the outcomes of my research. Nevertheless, conservation and environmental efforts are necessary for the future of our world, and therefore, a great deal of care must be given to their creation. Involving local communities in this process is an important mean of securing its viability.

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³² Beehler, Kirkman, “Lessons Learned from the Field.”

³³ *Tree Kangaroo Conservation Program Annual Field Report* (Seattle: Woodland Park Zoo, 2005).

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Factors Influencing the Prolongation of Stay Expatriates in Brno¹

Abstract | Brno, the second largest city in the Czech Republic located in the South Moravian Region, has become one of the most important targets for expatriates. Despite many conceptual uncertainties, expatriates refer to people who are educated and skilled workers, who are selected and prepared for job positions they move to foreign countries for in order to hold those positions for some time and then return back again. The preceding quantitative research, The Great Brno Expat Survey conducted among expatriates in the South Moravian Region, demonstrated an inconsistency between planning their stay rather on a short-term basis and, and the fact that their stay gradually changed into a more permanent one over time. It deals with the important question of what circumstances lead to expatriates prolonging their stay or leaving the city. To answer the question, we applied the qualitative research method of the World Café. The first discussion topic concerned the circumstances of the expatriates' arrival to the Czech Republic, the second was the reasons for staying or leaving Brno, and the third was the life of expatriates among local inhabitants. The research showed that expatriates mention a number of motivations as the set of factors that led to the prolongation of their stay. The original plans tend to be revised on the basis of experience and views formed during their stay in the city.

Keywords | Assigned expatriate – Brno – Foreigners – Immigration – Prolongation of stay – Self-initiated expatriate – Skilled labour migrants – the World Café

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1 Introduction

Thanks to economic development, especially over the last two decades, Brno, the second largest city in the Czech Republic located in the South Moravian Region, has become one of the most important targets of the specific category of highly qualified foreign migrants known also as expatriates. The city of Brno, which developed mainly under the influence of industrialization, when especially the textile and engineering industries underwent development, as well as the socialist industrialization and controlled urbanization after WW2, was one of the most important industrial regions in Czechoslovakia. As Ondřej Mulíček² claims, despite the limitation of its political significance, the city has preserved the status of an important centre of economic control

¹ The text was supported by the project “Expats in the South Moravia Region: Stay and Needs,” TL01000465, TL – Program for the Support of Applied Social Sciences and Humanities Research, Experimental Development and Innovation ĚTA.

² Ondřej Mulíček, “Prostorové vzorce postindustriálního Brna,” in *Město: Proměnlivá ne/samozřejmost*, eds. Slavomíra Ferenčuhová, Magdaléna Hledíková, Lucie Galčanová, and Barbora Vacková (Brno: Pavel Mervart, Masarykova univerzita, 2009).

and management. After 1989, the city underwent a significant economic restructuring processes and post-industrial transformation. This involved the status of the city, its infrastructure, the production of skilled labour, political support for the arrival of foreign multinational companies, and other factors creating conditions for intensive integration into global labour markets and the permanent inflow of highly skilled foreign migrants. People with a rather unique migration experience constitute the category of expatriates. Despite many conceptual uncertainties,³ expatriates refer to people who are educated and skilled workers, who are selected and prepared for job positions they move to foreign countries for in order to hold those positions for some time and then return back again.⁴ Yvonne McNulty and Chris Brewster⁵ examine the concept of expatriates, arguing that sloppy use of the term in the past has led to problems of inconsistent research, incompatible findings, lack of clarity in the field, and finally a lack of consensus about expatriate concepts. For the concept's delimitation it is important to identify the boundary conditions under which expatriate employment is enacted. As part of two major research streams focused on the assigned expatriate (AE) and self-initiated expatriate (SIE), there is a proliferation of messy terminology and concepts. The authors therefore offer two major insights from our analysis to guide future studies: they developed an empirically driven theory-specific statement (definition) of business expatriates and identified four boundary conditions. The first condition is that a expatriate must be organizationally employed. The second condition is the intended length of time abroad for the business expatriate, i.e., the temporal dimension. This condition is determined by the originally planned temporary nature of the expatriate's stay in the host country, irrespective of the actual length of time they are employed there. The intended length of time abroad for an expatriate can be short (1–12 months for short-term assignees, mid- to long-term (1–5 years). A third condition is whether the individual attains the citizenship of the host country. Expatriates are non-citizens and third country nationals. A fourth condition is regulatory cross-border compliance necessitated by organizational employment in combination with non-citizenship. This condition is determined by the legal context in which expatriate employment is enacted and whether people have the right to stay, and are allowed to seek work legally.

Expatriates differ from the wider category of highly skilled labour migrants mainly in the definition of the length of their stay, which tends to be planned as time-limited, usually being short, amounting to weeks, months or years at most. It is definitely not connected, however, with a permanent residence, but instead only a temporary one. An expatriate is situated in a particular job position, which they are usually sent to by their employer, with a limited possibility to influence the selected location,⁶ which then becomes their temporary home, their temporary base in an open, reflexive and uncertain labour biography, as described by Ulrich Beck as early as the 1990s. Although highly skilled migration may look, at first glance, like “successful” migration, it is affected by the dynamics of global labour markets, such as discrimination, unemployment,

³ Sarah Kunz, “Expatriate, Migrant? The Social Life of Migration Categories and the Polyvalent Mobility of Race,” *Journal of Ethnic and Migration Studies* 46, (2019): 2145–2162, among others, describes the term expatriate as unstable and contested.

⁴ Michael J. Morley, Heraty Noreen, and David G. Collings, *New Directions in Expatriate Research* (New York: Palgrave Macmillan, 2006). Noel Casteree, Alisdair Rogers, and Rob Kitchin, *Dictionary of Human Geography* (Oxford: Oxford University Press, 2013). Sylwia Przytuła, “Migrants, Assigned Expatriates (AE) and Self-initiated Expatriates (SIE) – Differentiation of Terms and Literature-Based Research Review,” *Journal of Intercultural Management* 7, no. 2 (2015).

⁵ Yvonne McNulty and Chris Brewster, “The Concept of Business Expatriates,” in *Research Handbook of Expatriates*, eds. Yvonne McNulty and Jan Selmer (Cheltenham: Edward Elgar, 2017).

⁶ Expatriates can also move at their own initiative, look for an employer abroad, offer themselves on the global labour market and be the initiator of the relocation.

offshoring of skilled jobs and non-transferable degrees.⁷ This concept has significant consequences for the expatriate, for devising their life strategies, as well as for their social interaction in the new environment and socio-economic integration.

2 About the Research – the World Café

The qualitative research identified the factors that affect the transformation of a strategy that leads to more permanent forms of settlement or, on the other hand, to the leaving of the city. It deals with the important question of what circumstances lead to expatriates prolonging their stay or leaving the city.

The preceding quantitative research *The Great Brno Expat Survey, 2018*,⁸ conducted among expatriates in the South Moravian Region revealed that almost one half of expatriates (47.8%) lived in Brno for 1–3 years. More than one fourth of expatriates (25.8%) lived in Brno for five to ten years, and more than one tenth of expatriates (15.8%) lived there for less than one year. In terms of the planned length of stay at the moment of data collection, almost two fifths (38.9%) of the expatriates did not know how long they were going to stay in Brno. More than one fourth of expatriates (28.7%) wanted to stay in Brno permanently. Less than one fifth (16.1%) of the respondents wanted to stay for more than three years but not permanently. More than one tenth of expatriates (10.7%) planned to stay for less than three years. 5.6% of expatriates wanted to stay for less than a year. The future plans were affected by the fact if the respondents had a partner from the Czech Republic. Those respondents answered more often that they planned to stay permanently there (52.6%). The submitted data indicated an inconsistency between planning their stay on a short-term basis and the fact that their stay gradually changed into a more permanent one over time. The decision is also influenced by the fact that expatriates have children (e.g., the birth of a child) and are also satisfied with the income level. The life strategy transformation and the tendency to prolong the stay in the city have significant consequences for expatriates and other inhabitants of the city. Expatriates turn into foreigners living in the city for a long time and permanently, establishing families, living and working here. The quantitative research does not answer, however, the question of what the factors are that influence the transformation of the decision to either prolong the stay or leave the city. This the reason why we applied the qualitative survey to answer the question.

We followed the concept of expatriates by Yvonne McNulty and Chris Brewster⁹ in the process of the participant's selection. Our participants had to belong to a field defined by boundary

⁷ Astrid Eich-Krohmer, "Twenty-first-century Trends in Highly Skilled Migration," in *Routledge International Handbook of Migration Studies*, eds. Steven J. Gold and Stephanie J. Nawyn (London, Routledge: Routledge International Handbooks, 2014).

⁸ The design of the questionnaire survey was created in close cooperation with project partners from the Institute of Religious Studies, Faculty of Arts, Masaryk University and the application guarantor of the project—Brno Expat Centre. The questionnaire was divided into several thematic areas—housing, healthcare, education system, satisfaction with various aspects of life in Brno, cooperation with agencies, insight into public institutions, socio-demographic characteristics and others. The questionnaire contained 122 questions in total, while not every respondent answered all the questions. The online questionnaire data was collected in October and November 2018 from a link (hyperlink). This link was sent out to relevant actors, participants. The online questionnaire was distributed through Brno Expat Centre contacts, social networks, information leaflets and personal links between respondents. It was also helpful to contact employers and universities. The online questionnaire was filled in by 1,013 respondents. Subsequent data analysis was carried out using the IBM SPSS statistical software application.

⁹ McNulty and Brewster, "The Concept of Business Expatriates."

conditions. They had to be organizationally employed, have a planned temporary expatriate stay in Brno, have a residence permit under the Alien Act, and legally work in qualified positions.

We applied the qualitative method—a participation research method called the *World Café*. It is a less common research method offering many group interaction advantages. In terms of methodology, we were inspired by texts by authors such as Juanita Brown¹⁰ and co-authors as Nancy Margulies¹¹ and David Isaacs.¹²

Compared to focus groups, which concentrate on one topic, the World Café enables determining several discussion topics at a time. As soon as they are defined, smaller groups are created, each of them discussing one of the topics. These groups of participants circulate around discussion tables, and a discussion on a topic has a pre-defined time limit. The participants add statements on each topic they find important and may discuss together and provide arguments. All of the discussed topics are recorded on a flip-chart by the discussion facilitator.

Physically, the group either moves to another table with a paper, or a paper is moved to another group (we chose the transfer of groups). Each group comments on each topic; upon the arrival of a new group, the facilitator at each table sums up what the previous group said. The main moderator initially explains how the discussion will be organised and sees to the observance of a time limit as well as the smooth course of the group discussion. The facilitator is present at each discussion topic (several facilitators are required), which enables the guiding of new groups through the statements that were heard earlier. The groups do not have to reach a general agreement. The goal of the method is to identify the various opinions of the participants. It creates space for acquiring a view of the relevant topics from various perspectives. If the same opinion on the relevant topic prevails, the topic in the group can be developed in more detail. The main moderator closes the discussion and sums up the results.

Thanks to the distribution of a higher number of participants into several smaller groups, all the participants have an increased chance to express their opinion on all the topics. The advantage of the method is that it enables the creation of more data for a relatively short period of time. The expressed opinions are discussed immediately between the participants with differing opinions. The participants respond to the opinions of the others, which leads to the collection of opinions from various points of view. If the same opinion prevails, it can be developed in more detail in the group. By dividing the participants into smaller groups, better control of the discussion is achieved and the transfer of opinions among the groups is enabled. The participants express their opinions on all the topics. The time and organisational demands of this method can be a disadvantage, however, as the discussion has to be well prepared and managed in terms of facilitation. It is also possible that there may be a conflict between participants with different opinions. The participants' fear to express their ideas before others and defend them and/or their unwillingness to speak in front of other people may represent a risk.¹³

Within the organised participative meeting, there were no conflicts and the facilitation did not bring about any difficulties. The discussion was held in English. At the beginning, the facilitators introduced three main topics, which were allocated to three discussion tables, with the groups

¹⁰ Juanita Brown, "The World Café. Living Knowledge Through Conversations That Matter" (PhD diss., The Fielding Institute, 2001).

¹¹ Juanita Brown, Nancy Margulies, and the World Café Community, *The World Café: A Resource Guide for Hosting Conversations That Matter* (Whole Systems Associates, 2002).

¹² Juanita Brown and David Isaacs, *The World Café: Shaping our Futures through Conversations that Matter* (San Francisco: Berrett-Koehler, 2005).

¹³ Brown and Isaacs, *The World Café: Shaping our Futures through Conversations that Matter*. David Vačkář and Eliška Krkoška Lorencová, "Aplikace participativní metody World Café v oblasti globálních problémů životního prostředí," *Envigogika* 12, no. 2 (2017).

of participants taking turn at each table after half an hour. The first discussion table focused on important factors that were identified by the participants as essential upon arrival in Brno. They discussed what needs and support they had and searched for, what had been shocking for them, and what they had not been able to handle on their own. The second discussion table dealt with the reasons that led the participants to stay in Brno, or, on the other hand, to leave the city. The last topic concerned the evaluation of living among locals, the success of incorporation into society and the interest in being incorporated and accepted by society. Nine participants, who identified themselves as expatriates, took part in the discussion. The structure of the participants was varied—both in terms of the country of origin, age and length of stay within the territory of the Czech Republic. The participants came from Croatia, Israel, Brazil, Russia, India, New Zealand, Turkey, Nigeria and Mexico. The age of the participants ranged from 25 to 39, and the length of stay ranged from seven months to twelve years. The group was facilitated by two moderators. The audio recording and the written transcript were subsequently analysed by thematic analysis.

3 Factors Influencing the Prolongation of the Stay or Leaving the City

The first discussion topic was about the circumstances of the **expatriates' arrival in the Czech Republic**, where the primary reason was definitely an attractive job offer. A regular income and a permanent job were ranked by the participants in the first place of importance. Help with bureaucracy and obtaining the necessary documents for the stay, which is more difficult for third-country nationals, also appeared to be essential. Since expatriates do not know and cannot speak the local language when they arrive in the city, finding a place to live is difficult for them. In better situations, housing is provided by the employer for at least the first few weeks after arrival; the employer also provides information about possible ways of finding permanent housing and/or where to ask for assistance. It is also important to know how to access the necessary information. It is easier for workers employed in large corporations which refer them to a co-operating organisation providing services for foreigners (e.g., the Brno Expat Centre). Expatriates with a Czech partner, who can help them solve problems at any time, have an advantage as well.

The discussion about the second topic, where **the reasons for staying or leaving Brno** were specified, produced various arguments. Some factors were identified as more important, some of them were identified as less important. The participants specifically emphasised the fact that Brno is a safe place where they do not feel in danger.¹⁴

For me, the reason to stay here is the low level of crime. Even though I am living in Cejl, which is known as a problematic neighbourhood of Brno, Cejl is still much safer than the place I was living before, because I am from Russia and there are a lot of places which are dangerous. And I know a lot of expats who agree that the level of safety is very high. [a participant from Russia]

Expatriates consider Brno to be a city where they can imagine establishing a family and settling for a longer period of time or forever. All the participants appreciated the low cost of living. They realised, however, that the local wages are lower compared to other European countries, such as Germany and Austria. They also discussed the housing costs, when the purchase prices and rental prices of real estate have been growing in recent years. Some discussants wishing to rent a flat encountered discrimination because they were foreigners. In their statements, they considered it a fact and interpreted it as a result of concerns about foreigners in general and the

¹⁴ This was mainly commented on by participants from countries with a high crime rate, e.g., from Brazil or Russia.

manifestation of social distance. As for the language barrier, some participants admitted they should learn the Czech language in order to integrate successfully into Czech society, which they had not managed so far.

For me, the biggest problem is the Czech language, I've tried to learn it several times. It's possible that I am very bad with languages, even with my own mother tongue, so learning a foreign language was very difficult for me and after trying for the fifth time I gave up. [a participant from India]

Apparently, not all of the participants present were sufficiently motivated, mainly those participants who work in large corporations, where they use English and have a partner, who is either a foreigner or can speak English, so they do not need to speak Czech. Many expatriates are not motivated to learn to speak Czech on a conversational level. They do not think that Czech is a world language, which they could eventually use in another country during their further career. Czech is also a language which takes a long time to learn, and many of them eventually give up the study of it. Some of them stated, however, that if someone decides to live for a long time in the Czech Republic, they should try to learn at least the basics of the Czech language.

The language barrier is also connected with difficulties in applying for the permanent residence or Czech citizenship and finding a job where a command of the Czech language on a certain level (e.g., in healthcare) is required.

The labour market in Brno is more open to foreigners, who are very well versed in IT or work in customer centres where a command of world languages is required. It is almost impossible for foreigners, who cannot speak the local language, to find a job in another sector. Other reasons for staying/leaving Brno, that appeared in the expatriates' discussions, are listed in the following table (Table 1).

Table 1: Summary of the World Café topics from the second discussion table

Reasons for staying in Brno	Reasons for leaving Brno
Low crime rate and high sense of security	Lower income for the same type of work compared to other EU countries
Low cost of living	Problems and barriers connected with the language (difficulty of the Czech language and its low level of application in everyday and work life)
Geographic closeness of important cities and traffic junctions	The feeling they do not belong here, it is not and never will be their home (a sense of belonging)
Relationship with a Czech partner and the presence of other family members	Personal reasons (a need for change)
Organised and cheap transportation system, good infrastructure	Problems with obtaining a residence permit and citizenship (mandatory Czech language exam)
Family-friendly city	Limited offerings of job positions outside the area of information technology, and positions focused on a command of languages, a lack of opportunities to use their potential
Multicultural working environment	Less multicultural public space
Lively and cultural city with the proximity of nature	Drastic increase in rent and cost of housing, difficulty in finding flats to rent for foreigners
Religiously independent free city compared to other countries (such as India, Nigeria)	Lack of English-speaking health care experts
Good beer (cultural symbol)	Low-quality food, lack of exotic fruits and their high price

The third discussion topic focused on the **life of expatriates among local inhabitants**. Here, the opinions varied, and were not in such agreement as in the case of the other two discussion tables. This was caused by the varying contents of the acquired experiences. Interaction with others leads understandably to more intensive awareness of one's foreignness. An expatriate is a foreigner, who interprets the cultural patterns of the group they encounter.¹⁵ They do not change in many aspects, which were described by sociologist Alfred Schütz a long time ago. They do not try, for example, to be accepted permanently by the group they joined, they do not undergo a critical life situation and do not lose their social status. In actuality, they lose to a greater extent the natural interpretation of social life and standard "recipes" for communication with people in common interactions outside the job. The discussions revealed that it is a painful process, where the expectation that the expatriate will be accepted as an expert collides with the fact that this status does not help in common life and interactions with the surroundings. In other words, the environment does not take into account the social status of the expatriates, and the expatriates do not understand this fact. The discussants stated that their surroundings were pleasant, but that people were very formal and closed in relationships and that it took some time before the locals begin to trust foreigners and allow them to enter their private lives. The expatriates explained this unsociability as a consequence of historical events, especially Socialism. Expatriates, due to their orientation, linked social distance to ethnic homogenization of society and specific interpersonal relationships that developed during the totalitarian era. Cultural differences and their consequences were also mentioned.

People are still stuck in Soviet times, like it's changing a bit, you can see hipsters going out in Brno, which is cool, people are becoming a little bit more chill, but still there is the structured thing... [a participant from European country]

According to the participants, the locals are always open to going out for a beer together. The majority of participants find it difficult, however, to form a genuine attachment and make friends with Czech people. They feel that Czech people are friendly, can help, but are reserved at the same time. It is not a language or cultural barrier, but a perceived social distance that is considered a question of the attitude and openness to other people.

A: They (Czechs) are always open to going out for a beer. But I would say they are friendly...

B: ...but they are not friends.

A: Yes, I think it's really hard for an expat to be friends with real Czech people, I am not generalizing, but I could say that in most cases. [discussion among two participants]

Another passage points to the perceived position of an alien expatriate who cannot overcome the alien role.

I have some Czech friends who I am very close to, but I still feel that I will always be the international person that's from the outside and I will never really be their true friend. It's friendship but not a friendship like with another Czech person.

There was the opinion that even a longer stay in the Czech Republic does not necessarily mean the expatriate feels at home here. Sometimes, they are even sceptical of whether a stay for many years would lead to a sense of being settled and at home.

¹⁵ Alfred Schütz, "The Stranger: An Essay in Social Psychology," *American Journal of Sociology* 49, no. 6 (1944): 499.

The second thing is the sense of belonging. I think that in historically closed countries in Central Europe, you can integrate, you can live your life, but I think it would take a long time before I felt I belonged here. I would like to go somewhere, where I could feel I belong and Brno will never be that city. [a participant from India, living in Brno for 12 years]

A wider spectrum of expatriate distinctions acquires many negative meanings in interactions, thus becoming significant differences. In other words, the more distinct visible features a foreigner has, the more different they are perceived to be in ordinary interaction. This has its consequences, especially in the perceived racism and xenophobia and/or in various forms of discrimination. Some participants stated the situation has been improving, primarily in the younger generations living in the city, which is more used to diversity thanks to travelling abroad.

A: Sometimes I walk around and people make monkey sounds and I just turn around and I just smile and I keep moving. [a participant from Nigeria]

B: The worst part is, it's really difficult for people like me to be invisible, everything you do is watched, every small mistake you make is magnified. [a participant from India]

Some people try to present a positive image, but many of them lose their motivation and give up after some time. During the period of the migration crisis, when the topic of foreigners was mentioned in the public space—in the media, political campaigns—it was a bit worse. Foreigners were presented as people the locals should be afraid of, which was in contrast with the positive self-perception. There were expectations that knowing cultural patterns should not concern expatriates alone, but that normal members of society should as well who, however, think that they do not need such familiarisation for their social existence.¹⁶

Some time back before the whole immigration issue [...] if I divide Brno before 2012 and after 2012, so when I first came here, I was actually considered more as someone exotic, so people didn't know anything about me, I was different and they wanted to get to know me, but after this immigration stuff happened, they began having these prejudices. I never noticed the prejudices before 2012, for them I was a guy who came from a different place and they were curious [...] I was considered different but not in a bad way [...] after the immigration thing and after the propaganda in the media, it's more prejudiced, they already know you are like that [...] then you are trying to change the negative perception. [a participant from India]

At the same time, they are opposed to being called expatriates. The use of this designation has negative consequences, primarily because it creates a special category which is separated from the inhabitants of the city. Nevertheless, many of them consider themselves local inhabitants and do not think they differ from the others. In this interpretation, it is apparent that the term is not definitely a neutral migration category,¹⁷ but a category that expresses power and economic relations.

Also the word expat, why does that even exist? [...] Just by saying that, you are already officially separating people here from each other. Like I want to be known by who I am, by my personality and what I do and not by the fact that I am an expat. [a participant from Israel]

¹⁶ This comment is a stimulus for a number of new approaches to integration. E.g., Roman Baláž and Lucia Čemová, "The Mainstreaming of Integration Governance and Social Work in the Local Integration of Immigrants," *Social Work Eris Journal Winter* no. 1 (Winter 2019): 94–110 focus on how to use a theoretical concept that would support the building of bridges between different actors in the process of immigrant integration (mainstreaming of integration governance) and social work is presented as an important tool for "bridging" members of society.

¹⁷ Kunz, "Expatriate, Migrant?" 2145–2162.

4 Conclusion

According to the general definition, expatriates should plan their stay on more of a short-term basis, actually staying in the city for a shorter period of time, but some quantitative data indicates a tendency towards more permanent forms of stay.

The quantitative research only enables, however, a verification of a few hypotheses; on the level of understanding the motivation of expatriates, we find much wider structures of motivations. The qualitative research indicated that expatriates refer to many motivations as the set of factors that led to the prolongation of their stay. The perception of Brno as a city where one can live a good life is crucial. It is evident that the original plans tended to be revised on the basis of experience and opinions created during the stay in the city. Some participants can imagine staying in the city for a long time and do not even reject the idea of starting their own family. This idea gradually changes into practice, which leads to longer forms of stay. This is also supported by a gradually improving awareness, which enables expatriates to get their bearings better and faster. This is also thanks to social networks and consultancy from organisations providing services for foreigners, and the assistance of large corporations, who are gradually employing more foreigners. As a result, more information in various forms is available, even prior to arrival in the country. Assistance with bureaucracy and obtaining various documents is essential. Institutional help (corporate, non-profit, general) influences the strategies of settling in the city. There are many reasons for staying in the city and for leaving it. People staying in the city are motivated by the feeling of safety, the low cost of living compared to foreign countries, the geographic location of Brno, the good infrastructure, family-friendly environment, religious freedom and the cultural life. On the other hand, the lower pay, difficult language, difficult adaptation, fewer opportunities to make a career and the growing costs of living are demotivating. According to their interpretations, despite the declared effort to become “ordinary” inhabitants of the city, expatriates are still foreigners. It is difficult and takes a great deal of time to overcome barriers; expatriates feel they need to break free of the perception of foreigners as a threat. They say it depends not only on their behaviour but also on the understanding of other inhabitants of the city. This is one of the reasons why they may refuse to accept being labelled as expatriates, which evokes instability, volatility and maintaining the otherness of foreigners, who have not been foreigners for a long time already.

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The Visual Sociology of Pierre Bourdieu: Parallels and Sympathetic Method in the Work of Bourgois and Schonberg

Abstract | This article considers photographic practice as a method of inquiry in Pierre Bourdieu's early trans-Mediterranean studies and in the ethnographic work of Philippe Bourgois and Jeff Schonberg in the United States. This juxtaposition reveals striking similarities in how these authors employ photo-ethnographic inquiry in their empirical research projects and points to the fact that both the French theorist and Bourgois and Schonberg utilise a large photographic archive for theoretical parsing and further conceptual development at various stages of their intellectual journeys. The article further illuminates what visual methods may add to textual explanations of habitus beyond simple illustration and considers some problems that might arise theorising from photo-ethnographic work generally, and more particularly among marginalised members of society. The article highlights Bourdieu, Bourgois and Schonberg's strong commitment to using habitus, attentive to seeing beyond conventional and official explanations, in parallel, long-term, sympathetic integration of their photographic and conceptual evidence.

Keywords | Bourdieu – Bourgois and Schonberg – Ethnic-habitus – Photo-ethnography – Visual methods

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1 Introduction: Bourdieu as Photographer

It is not all that well known that Pierre Bourdieu was an avid photographer. His exploits as a social theorist and as a multi-method researcher into a wide range of social phenomena have today achieved the recognition of iconic status across the social sciences such as anthropology and sociology.¹ It is agreed today that Bourdieu's early experiences in Algeria during the war of independence from France were formative in his approach to social research and were foundational in turning his philosophical training into a new lexicon of social science.² He continued

¹ Michèle Lamont, "How Has Bourdieu Been Good to Think With? The Case of the United States," *Sociological Forum* 27, no. 1 (2012): 228–237.

² Loïc Wacquant, "Following Pierre Bourdieu into the Field," *Ethnography* 5, no. 4 (2004): 387–414; Craig Calhoun, "Pierre Bourdieu and Social Transformation: Lessons from Algeria," *Development and Change* 37, no. 6

to develop these ideas and research methods throughout his career. This article contains several sections examining elements of the relationship of Bourdieu's photographic work in comparison to the important contribution of Bourgois and Schonberg³ working ethnographically on the other side of the Atlantic who came to adopt a Bourdieusian approach. This particular contrast reveals connections stronger than apparent contrasts and differences in their research foci.

Bourdieu's outlook, both professionally and philosophically, can be seen in an arc from Algeria and colonialism⁴ to financialised capitalism and the marginalising influence of neoliberalism, the latter seen for instance in his 1999 multi-authored *Weight of the World*.⁵ The destabilising effect of this modernisation process in both underdeveloped and developed societies, and particularly France, was investigated by Bourdieu and his students and collaborators from many angles. For Bourdieu, Algeria was a living laboratory of all these things and many more contradictions and injustices. To capture this turbulent and dramatically changing world of Algeria, he used a number of methodological tools including photography.⁶

Only in the last decade has a broader understanding of the significance of photography and the trove of photographs from Algeria become popularised and more widely debated. The Algerian corpus of Bourdieu's photographs amounted to several thousand pictures, although this was reduced to less than a thousand for various reasons such as his moving to other places.⁷ A small selection of the photographs was exhibited at various academic institutions in Europe as well as in Algeria, and a book *Picturing Algeria*⁸ was written in 2012. This book was produced in participation with Christine Frisinghelli a curator of Bourdieu's photographic archive and Franz Schultheis, a professor of sociology who had also interviewed Bourdieu on photography.⁹

One of the things not typically appreciated about Bourdieu's Algerian photography is that it is not merely of antiquarian interest. Bourdieu came back to his photographs time and time again.¹⁰ He reread them first in relation to the problem of representing and depicting the violent resistance to decolonisation which at the same time was brutally dragging Algerian society across the threshold of modernity. Bourdieu also returns repeatedly to these photographs to think more deeply, for instance, about Euro-centric perspectives and gendered questions of masculinity and femininity. This body of photography was crucial to the ongoing development of the conceptual and perspectival extensions of his theoretical oeuvre, for example *The Logic of Practice*,¹¹ perhaps his most celebrated formal attempt to articulate his understanding of society.

(2006): 1403; Michael Grenfell, "Bourdieu in the Field: From the Béarn to Algeria – A Timely Response," *French Cultural Studies* 17, no. 2 (2006): 223–239.

³ See, for instance, Philippe Bourgois and Jeffrey Schonberg, "Intimate Apartheid: Ethnic Dimensions of Habitats among Homeless Heroin Injectors," *Ethnography* 8, no. 1 (2007): 7–31; Philippe Bourgois and Jeffrey Schonberg, *Righteous Dopefiend* (Oakland: University of California Press, 2009).

⁴ Andrea Rapini, "Can Peasants Make a Revolution? Colonialism, Labour, and Power Relations in Pierre Bourdieu's Algerian Inquiries," *International Review of Social History* 61, no. 3 (2016): 389–421.

⁵ Pierre Bourdieu et al., *The Weight of the World: Social Suffering in Contemporary Society* (Stanford: Stanford University Press, 1999).

⁶ Franz Schultheis, Patricia Holder, and Constantin Wagner, "In Algeria: Pierre Bourdieu's Photographic Fieldwork," *The Sociological Review* 57, no. 3 (2009): 448–470.

⁷ Christine Frisinghelli, "Photographs in Context: Notes on Handling an Archive and Looking at the Exhibition Pierre Bourdieu's Photographic Documentary Accounts in Algeria, 1957–1961," *The Sociological Review* 57, no. 3 (2009): 512–521.

⁸ Pierre Bourdieu, *Picturing Algeria* (New York: Columbia University Press, 2012).

⁹ The interview was conducted in 2001 and published in various journals and books, see for instance Pierre Bourdieu, *Picturing Algeria* (New York: Columbia University Press, 2012): 7–40.

¹⁰ Schultheis, Holder, and Wagner, "In Algeria," 448–470.

¹¹ Pierre Bourdieu, *The Logic of Practice* (Stanford: Stanford University Press, 1990).

In *The Logic of Practice* his experiences and research in Algeria and in the peasant communities of Béarn form a remarkably even-handed treatment of developmental and first-world situations under conditions of urbanisation, providing surprising parallels.¹² Even more remarkable, however is to think about the basis of Bourdieu's arguments from these two environments. In both cases, Bourdieu assembles a body of photography amongst his other methodological approaches and it is evident in how he goes about explaining these examples that his photographs informed not just his early work but were continuing to shape and reshape his conceptualisation and theorising about various social phenomena in his mature work. Looking at photographs as Bourdieu clearly did in elaborating the concepts of gendered habitus and bodily hexis, he can again be seen to draw on his photographic trove from both Algeria and Béarn, for instance in *Masculine Domination*.¹³

The recurrent significance of the visual for Bourdieu can be seen when we look at other scholars working in a Bourdieusian manner and often demonstrating a similar ethnographic focus. The present discussion achieves this by concentrating on exploring the relationship between Bourdieu's photographic work and the visual enterprise of Bourgois and Schonberg.

2 The Photography of Bourgois and Schonberg

One of the mysteries in understanding Bourgois and Schonberg's extended research labour in chronicling drug dependency amongst American homeless men and women, is the connection to Bourdieu and the Bourdieusian modes of using photography. Unlike Wacquant, Bourgois and Schonberg came much later to Bourdieu's work.¹⁴ Their photo-ethnographic approach is closely aligned, however, with Bourdieu in collecting a vast visual documentary library of the intense and often fraught moments and situations they encountered. In their working together, Bourgois was a professor of anthropology directing the long-running government funded study of drug addiction and Schonberg was the photographer and a PhD student in medical anthropology.¹⁵

The arc of Bourgois and Schonberg's Bourdieusian journey can be seen briefly as follows. For about a decade from the early 1990s onwards, they steadily accumulated a large body of photographs about homeless heroin injectors, mostly men living in deindustrialised sections of San Francisco.¹⁶ They did not, however, start their journey with a Bourdieusian theoretical framework. It is interesting to observe in the latter stages of their trajectory more incorporation of Bourdieu's work. This process can be measured by comparing two articles they wrote, the first in 2002 and the second in 2007. Both articles make excellent use of referencing their photographic data, exploring it in rich ways to understand the lives and experiences of this marginalised group of homeless participants.

Bourgois and Schonberg published an article in 2002 in which they praised the work of John Ranard who also took many photographs of drug addicts, in his case in post-Soviet Russia, and which portrayed this precarious segment of the Russian under-class.¹⁷ Bourgois and Schonberg

¹² Wacquant, "Following," 387–414.

¹³ Schultheis, Holder, and Wagner, "In Algeria," 453; Pierre Bourdieu, *Masculine Domination* (Stanford: Stanford University Press, 2001).

¹⁴ Bowen Paille, "Philippe Bourgois in Amsterdam: An Interview," *Amsterdams Sociologisch Tijdschrift* 30, no. 4 (2003): 544–574.

¹⁵ Philippe Bourgois, "Lumpen Abuse: The Human Cost of Righteous Neoliberalism," *City & Society* 23, no. 1 (2011): 2–12.

¹⁶ Bourgois and Schonberg, *Righteous Dopefiend*, 4–5.

¹⁷ Jeffrey Schonberg and Philippe Bourgois, "The Politics of Photographic Aesthetics: Critically Documenting the HIV Epidemic Among Heroin Injectors in Russia and the United States," *International Journal of Drug*

saw great value in Ranard's work and this is reflected in their response to his article in the same year. They descried how he skilfully and persuasively combined the text and photographs to reveal the combination of personal dysfunction and the distress with what they termed "the needless destruction of thousands of young lives due to punitive public health policy."¹⁸ This had similarities to their own research context and the impacts they were documenting from neoliberal policies in policing and healthcare in the United States.¹⁹

It is unclear at this stage of Bourgois and Schonberg's writing what mix of inspiration, confirmation of the work they were doing, or a revelation that there were many more possibilities in the large photographic collection they had assiduously collected for a decade, that fixed Bourgois and Schonberg's attention in their response to Ranard. What can be documented clearly, however, is that by the time their second article was published five years later they were extensively incorporating Bourdieu's theoretical apparatus in that later article.²⁰ Central to the argument here is what had by then become central to Bourgois and Schonberg's apprehension of Bourdieu's photographic project – the multiple strands of theory and method in Bourdieu's work. They found they could use Bourdieu's work in their work, and this made much richer sense of the empirical data that they had gathered.

In an article from 2007, Bourgois and Schonberg presented 21 photographs drawn from their decade-long photo-ethnographic work. They selectively drew from their photographic archive to illustrate how macro power relations shaped their participants' lives and ways of being in the world. One of the most illuminating insights in this piece of writing is Bourgois and Schonberg's mature incorporation and appreciation of Bourdieu's work in articulating the idea of "ethnic habitus."²¹ They traced in various ways differences in practices amongst their research participants according to their different ethnic habituses. The photography allowed them to identify and illustrate nuances that they expressed in the terminology of "outlaws" and "outcasts," delineating them clearly and vividly.²² Their detailed field notes and extensive ethnographic work were also part of this, but without photography it would have been much more difficult to convey these insights about the ethnic habitus. Yet the photographs were there all the time! Like Bourdieu himself repeatedly going back to his Algerian corpus at later times in his career, Bourgois and Schonberg go back at this juncture to re-see, to re-read, to re-think what they had collected and previously used from their visual ethnographic material.

Bourgois and Schonberg's book *Righteous Dopefiend* published in 2009 more fully articulates their ethnographic and theoretical account. It describes multiple methods and incorporates various theoretical framing ideas from Foucault as well as Bourdieu and other writers. The book has 72 photos, some drawn from their 2007 selection, and many additions as they continued to expand their understanding. The book is something of a final report. Its format lends itself to

Policy 13, no. 5 (2002): 387–392; John Ranard, "A Little Less Shock and More Therapy," *International Journal of Drug Policy* 13, no. 5 (2002): 355–367.

¹⁸ Schonberg and Bourgois, "The Politics of Photographic Aesthetics," 388.

¹⁹ Philippe Bourgois, "U.S. Inner-City Apartheid and the War on Drugs: Crack Among Homeless Heroin Addicts," in *Unhealthy Health Policy: A Critical Anthropological Examination*, ed. Arachu Castro and Merrill Singer (Landham: Altamira Press, 2004), 303–313. Many of Schonberg's photographs in *Righteous Dopefiend* are an exemplary documentary of how neoliberal policies of law-and-order negatively impacted the daily lives of the homeless drug addicts. A good example of this is his photograph on page x which reveals how the war on drugs transformed the filthy nooks and crannies that are from the perspective of public health incubators for propagating infectious diseases into the safest places in which to inject heroin.

²⁰ Bourgois and Schonberg, "Intimate Apartheid," 7–31.

²¹ *Ibid.*, 7.

²² *Ibid.*, 18–27.

presenting many pictures and is a great example of how a combination of many lines of inquiry, notably the inclusion of photographs, and their detailed reflection upon these, adds up to a much more nuanced and comprehensive account of the field that they had been researching.

3 Contrasting the Visual: Bourdieu and Bourgois and Schonberg

In 2009, Schultheis, Holder and Wagner posed the question about Bourdieu's photography as follows: "how can we grasp the fact that photography as a method seems to be that important in Bourdieu's early works just to lose its relevance almost completely since the mid 1960's?"²³ These authors, in addressing this question, propose six possible partial explanations. First, that he had enough sociological problems for a full-life of work and that he did not need further photographic resources. Second and third, they suggest Bourdieu's possible fear of being misunderstood or even humiliated by either his participation in the Algerian war or derided as a hobby photographer. Fourth, they identified his shifting research interests to questions of symbolic capital and domination within fields of power and therefore Bourdieu needed other research strategies. Fifth, they suggest a sense of "foreignness" for Bourdieu from his positioning as a soldier and as well as "his philosopher's estrangement"—to which we might have added his "cleft habitus,"²⁴ his sense of an outsider in social class terms, the result of his long-distance upward social mobility. Sixth, in terms of Bourdieu's own professional habitus as a researcher, also suggest that photographing had already performed its tasks for Bourdieu and was further used only with regard to his photographic archive, as an active reminder of certain questions and subjects as well as of the scientific task of finding the right measure of distance and proximity relating to one's own position and interest as well as to the conditions being looked at and theorised.²⁵

This is central to the argument made in the preceding section in the present article in which we compared Bourdieu and Bourgois and Schonberg's use of a photographic archive. It might be further argued as intimated in Schultheis, Holder, and Wagner's argument about symbolic domination, that it is indeed highly likely that Bourdieu's intense Algeria-Béarn comparative ethnographic fieldwork had surfaced many of the larger themes he continued to wrestle with throughout the rest of his career. On this understanding, it is not moving away from the photography that is being observed, but that Bourdieu had so inculcated the literal, visual and implicit social relations of his photographic work, which then became the springboard for this further examination and elaboration of symbolic domination in a range of contexts that he went on to investigate. Thus, it is not a question of resiling from the photographs' visual value but a dialectical engagement with the insights that the visual photographic evidence brought to social inquiry that continued to be the starting point or the comparison point for many later parts of his intellectual project.

Returning now to Bourgois and Schonberg, there is another apparently small but nevertheless significant feature of their use of photography as a gift in relation to their research participants that again has a valuable parallel in trying to understand Bourdieu's similar use of photography in the field amongst the people with whom he worked and spoke on a daily basis.²⁶ Bourgois and Schonberg introduced their larger work in 2009 by describing the importance of their photo-ethnographic work.

²³ Schultheis, Holder, and Wagner, "In Algeria," 465.

²⁴ Pierre Bourdieu, *Sketch for a Self-Analysis* (Cambridge: Polity Press, 2008), 100.

²⁵ Schultheis, Holder, and Wagner, "In Algeria," 466.

²⁶ Franz Schultheis, "Pictures from Algeria: An Interview with Pierre Bourdieu," in *Picturing Algeria*, eds. Franz Schultheis and Christine Frisinghelli (New York, Columbia University Press, 2012), 8–10.

The photographs were all taken by Jeff [Schonberg]. The composition of the images recognises the politics within aesthetics; they are closely linked to contextual and theoretical analysis. Some photographs provide detailed documentation of material life and the environment. Others were selected primarily to convey mode or to evoke the pains and pleasures of life on the street. Most refer to specific moments described in the surrounding pages, but at times they stand in tension with the text to reveal the messiness of real life and the complexity of analytical generalisations. On occasion, the pictures themselves prompted the writing. Jeff never deliberately staged the actions portrayed in the photographs.²⁷

Bourgeois and Schonberg then go on to explain how photographs were important in relational terms and how they gave photographs as gifts:

Jeff's photography further integrated both of us into the scene. Many of the Edgewater homeless decorated their encampments with his pictures and they often introduced Jeff to outsiders as "my photographer." They usually introduced Phillippe as my professor and would often comment to Phillippe when he was alone with them, "Too bad Jeff isn't here to take a picture of this."²⁸

In these photographic exchanges, important relationships developed and insights and information were passed between researchers and the homeless people in those communities. On the one hand, "when they viewed pictures of themselves [the participants] were often shocked by their appearance—unhealthy, skinny, old, wrinkled, dirty, tired. This usually precipitated self-reflective conversations about their lives."²⁹ In more homely exchanges, warmer experiences were reported or observed, for instance: "Hank also framed and hung a group photo Jeff had taken of their thanksgiving barbecue, positioning it as if it were on the mantle of a fireplace."³⁰

The record on Bourdieu shows several similarities. Although Bourgeois and Schonberg focus on contrasting ethnic habituses, there are analogies in Bourdieu's comparisons between Algeria and Béarn. Bourdieu commented on his Algerian work as follows:

I took a lot of photos there, and the people were happy about it. These photos also include a series of pretty dramatic pictures of a circumcision—the father asked me to take them: "Come and take some pictures" Photography was a way of relating to people and of being welcome. Afterwards I would send them the photos.³¹

It was not all smooth sailing, however, and the intention in photography and the relationship that it did, or did not bring, can be seen in stark relief in Bourdieu's observation of some professional photographers:

During my years in Algeria, I often accompanied photographers doing photo reportages, and I noticed that they never spoke to the people they were photographing; they knew next to nothing about them. So there were different kinds of photographs. For example, there was a marriage lamp that I photographed, so that I could study how it had been made later on; or a grain mill, etc. On the other hand, I took photos of things that appealed to me. I remember a photo of a little girl with plaits, with her little sister standing by her side.³²

²⁷ Bourgeois and Schonberg, *Righteous Dopefiend*, 11.

²⁸ *Ibid.*, 12.

²⁹ *Ibid.*

³⁰ *Ibid.*, 217.

³¹ Schultheis, "Pictures from Algeria," 8–9.

³² *Ibid.*, 12.

Thus for Bourdieu, as Bourgois and Schonberg also found at a later date, the relationships that photography could potentially open up were very significant both for the research and in human terms through the sense of gift and human recognition of the other. It is of course a widely known and described phenomenon in the work of many photographers working with people, that taking and exchanging pictures humanises the relationship. Clearly many photographers are aware of this and take advantage of this fact. What makes it a significant feature in the work of Bourdieu and Bourgois and Schonberg is the profound way they *embed photography ethnographically* in their work, avoiding any sense of “add on” or decoration, and connecting their fieldwork with the progression of their intellectual work.

4 Picture and text

If the previous section explicitly and implicitly discussed the role of photographs in creating trust between the researcher and the people in the field, the present section shifts the conversation to a different kind of cross-verification of the evidence in the research environment. Bourgois and Schonberg consider in some detail the relationship between pictures and text.³³ More specifically, they analyse the links and the relationship between photographs and the captions of photographs. Their starting point is admiration for the work of Ranard noted previously. In the present discussion, this approbation for Ranard’s work can be exemplified in his Figure 7 picture of a man on his back on the ground with another man on top of him apparently holding a syringe close to his forehead. There are many possible interpretations of what this seemingly drug-related scene is portraying to the viewer.³⁴ Ranard’s caption reads as follows “Eye-drops made from crushed anti-indigestion pills are used to counteract constriction of the eye pupils, a sign of heroin use and enough to be stopped by the police. Moscow suburbs, Russia 2000”.³⁵ The photographic polysemy is interpreted for the reader in a clear and simple manner. Bourgois and Schonberg acknowledge the importance both of the text and the visual representation in deepening the complexity and understanding of the contradictions of these marginal individuals in Russian society. Their later work goes on to document similar possible contradictions for individuals in the United States as well. As they subsequently state in 2009:

The central goal of this photo ethnography of indigent poverty, social exclusion, and drug use is to clarify the relationships between large-scale power forces and intimate ways of being. In order to explain why, the United States, the wealthiest nation in the world, has emerged as a pressure cooker for producing destitute addicts embroiled in everyday violence. Our challenge is to portray the full detail of the agony and the ecstasy of surviving on the street as a heroin injector without beautifying or making a spectacle, of the individual involved and without reifying the larger forces enveloping them.³⁶

In their own work Bourgois and Schonberg refer to the layered contributions that photography contributes to research. These additional insights and the understandings photography creates are not in place of, or better than, other forms of evidence and data collection, but they are different and they add elements that other research methods do not and cannot provide. This does not involve abandoning the need for a critical evaluation of the insights derived from the photographic analysis, nor do these authors back away from the inherent ambiguity in terms of methodological assumptions and expectations that photography possesses, with like any other

³³ Schonberg and Bourgois, “The Politics of Photographic Aesthetics,” 388–389.

³⁴ *Ibid.*, 388.

³⁵ Ranard, “A Little Less Shock and More Therapy,” 363.

³⁶ Bourgois and Schonberg, *Righteous Dopefiend*, 5.

method, and which have to be deconstructed and evaluated on an ongoing basis. They state, it is “for this reason, we insist that without our text much of the meaning of the photographs we present could be lost or distorted.”³⁷ Bourgois and Schonberg go on to expand what they mean by these multiple meaning and ambiguities that photographs possess.

Photography’s strength comes from the visceral, emotional responses it evokes. But the capacity to spark Rorschach reactions gives photography both its power and its problems (Harper 2002). Interpretation, judgment, and imagination move to the eyes of the beholder. The personality, cultural values, and ideologies of the viewer, as well as the context in which the images are presented, all shape the meaning of pictures (Berger 1972). The multitude of meanings in a photograph makes it risky, arguably even irresponsible, to trust raw images of marginalization, suffering, and addiction to an often judgmental public. Letting a picture speak its thousand words can result in a thousand deceptions (see Sandweiss 2002: 326–333; Schonberg and Bourgois 2002).³⁸

Other writers confirm the necessary combination of text and visual. For instance, Christine Frisinghelli when discussing Bourdieu’s photographs remarks that:

The complementarity offered by [Bourdieu’s] text enables us to perceive the knowledge stored in the images more accurately, providing us with the necessary vocabulary to interpret visual information that is often open to more than one reading. In short, only textual supplementation allows us to acknowledge the image’s meaning, the determination of which is so highly context-sensitive in photography.³⁹

This brings to the surface a contrast between Bourgois and Schonberg’s work and that of Bourdieu. The *Righteous Dopefiend* contains, as did their 2002 and 2007 articles, numerous pictures and the text worked between the pictures and social theory to analyse and evaluate the causes and effects of different structural forces in the homeless milieu. In contrast to this photographic plenitude, Bourdieu’s work, notwithstanding over two thousand Algerian pictures and the significance of photographs in the Béarn and his *Distinction*⁴⁰ and other books, are not on display in the texts themselves. Instead, paragraph upon paragraph explores and considers the implications of his work in these fields where the photographs that he has taken were produced. As Frisinghelli says, for Bourdieu “photographs seem to have had an almost exclusively ‘private’ function: over decades, they served as memory supports for him for the repeated study and analysis of the Algerian experiences.”⁴¹ This is a useful comment but is too restrictive in representing the importance of photography methodologically and theoretically in the evolution of Bourdieu’s intellectual life. As we noted in the second section, concepts such as symbolic domination and the embodiment of habitus come directly from his combination of visual and other methodological efforts. Even coming back from the field, the evidence is that Bourdieu returned to the photographic data to refresh, remind himself and extend the implications of this visual corpus in relation to his conceptual and methodological activity.

It is once again evident that the common practice of using textual support for presenting photographs as part of a broad research methodology is taken by Bourdieu and also by Bourgois and Schonberg to a very high level. As this section has described, the use of text in explaining, checking and validating visual imagery is the first research necessity. These authors actually

³⁷ Ibid., 14.

³⁸ Ibid.

³⁹ Frisinghelli, “Photographs in Context,” 514.

⁴⁰ Pierre Bourdieu, *Distinction: A Social Critique of the Judgement of Taste* (London: Routledge & Kegan Paul, 1984).

⁴¹ Frisinghelli, “Photographs in Context,” 514.

work, however, at the ambivalence of not just a text explaining pictures but engaging their visual material to force themselves to constantly reexamine and rethink what it is that they know about their research environment and research participants. Yet again this is not an additional or convenient strategy, but something which takes place over many years, multiple iterations developing a deepening sensitivity, a diversity of methods applied to the situation, and an ultimate willingness to end up in a different place with a different understanding through new conceptualisation such as developing the idea of ethnic habitus.

5 Photography: Exploiting vs. Giving Voice

There is a certain fashionability in photography for ethnographic purposes across contemporary social sciences. This may include photo-elicitation, hi-tech use of flying drone photography, visual recording of interviews and many other applications using mobile phones and more sophisticated visual apparatus. In this context, the importance that Bourdieu and Bourgois and Schonberg give to the ethical and moral ambiguities surrounding photography has greater valence than ever. Just as we have seen that visual and textual representations on social media can be used affirmatively or destructively, similarly in research these immensely experienced researchers and users of photographic archives maintain the message that across the social sciences modern photography has brilliant possibilities, but can be equally used in undesirable disenfranchising and exploitive ways.⁴² Ultimately, the visual within conventional photography as a research tool establishes many technical parameters of its use, but the real questions go beyond technique and become matters of ethics and morality. When Bourgois and Schonberg advocate adopting Schepher-Hughes' call for a pragmatic approach to ethnography, this initially sounds like a technical question. When they elaborate what they mean, however, it turns out that they are quite clearly advocating an ethical stance.

Taking social suffering and moving it into museums and making it fine art, as exemplified at the global level by the work of Salgado (2000) or in the US inner city by Richards (1994) and Goldberg (1995) is a contradiction in terms. It is, however, also a subversive tool for provoking conscientisation. On the one hand there is the danger of the pornography of violence where "[...] people seem to have an enormous capacity to absorb the hideous and go on with life as usual (Schepher-Hughes & Bourgois, in press)." [...] Recognizing these deep contradictions and pitfalls to keep from being paralysed politically, analytically and aesthetically we advocate humbly practicing a "good enough" version of photo-ethnography following the anthropologist Nancy Schepher-Hughes' call for a "good enough ethnography."⁴³

For Bourgois and Schonberg, good enough photo-ethnography means doing photo-ethnography "that allows critical engagement with the violent injustices of everyday life in the face of paralysing, depoliticising postmodernist critiques."⁴⁴

Research cannot by itself manage perceptions of disgust, moral judgement, renegotiated stereotypes, or objectifying marginalised populations and communities. Research is not able to escape, however, the ambiguity of these moral and ethical tensions. On the flipside of how visual ethnography offers rich insights and opportunities for analysis, come the dangers of accidentally or carelessly exploiting or exposing disadvantaged members of society to further opprobrium and moral censure, instead of engaging policy and governmental agencies in creating a better and fairer social order. There is no easy solution to this set of tensions running through ethno-

⁴² Schonberg and Bourgois, "The Politics of Photographic Aesthetics," 387–392.

⁴³ *Ibid.*, 390.

⁴⁴ *Ibid.*

graphic research, but heightened awareness of the dangers needs to be developed along with the technical opportunities of gaining additional and richer information.

Once again it can be seen that there are interesting connections between the work of Bourgois and Schonberg and Bourdieu. This is not just the earlier uprooting or deracination of Algerian peasant society or the cultural loss of French peasant society in rapid mid-century urbanisation,⁴⁵ but it continues through his work and is seen profoundly expressed in the contributions to the *Weight of The World*. It is not without interest that Bourgois published a chapter in that volume.⁴⁶

6 Photography: “a Small Part” or “an Ethnographic Eye”

This final section juxtaposes Bourdieu’s visual sociology with the contributions Bourgois and Schonberg made in applying theoretical notions of habitus with the practical business of sustained photo-ethnography over many years. This takes into account Bourdieu’s and also Bourgois and Schonberg’s collecting of a large body of visual work that informed their ongoing thinking and policy suggestions. A number of epistemological and humanistic themes, already intimated in the preceding sections, are briefly canvassed here by comparing insights from Wacquant’s 2004 reading of Bourdieu’s photographic work on the one hand, along with reflecting on Sweetman’s 2009 piece on habitus and photography.⁴⁷ These insights help us evaluate the responses that Bourgois and Schonberg made to Bourdieu’s work. Their engagement shows important parallels to Bourdieu while at the same time offering authenticity in their apprehension of the evidence of the lives they are researching and with whom they are in contact.

Wacquant offers the first part in the dance between whether photography is, to use Sweetman’s modest phrase, “a small part”⁴⁸ of research and changing lives, or whether in fact there is a broader epistemological gaze in the development of what Wacquant himself describes as “an ethnographic eye.”⁴⁹ Although neither of these authors belabor the point of contrast here, it is possible to identify the dialectic between visual ethnography as embracing a range of value from merely illustrative at one end to transformative at the other end. The nature of their different investigatory projects means that what Wacquant says compared to what Sweetman says is not necessarily oppositional although we have inferred a comparative position about how they value and make use of photography.

Wacquant argues that photography had three functions in Bourdieu’s fieldwork.⁵⁰ Collectively, these achieve what he understands as an epistemological gain in what research can achieve and integrate from the available evidence. For Wacquant, Bourdieu’s photographs fit within an ethnographic discipline of sustained looking and reflecting to see what the research field is revealing: “Being at once capable and compelled to train the ‘gaze of mandatory understanding’ (Bourdieu, 2003b: 42) that is the distinctive eye of ethnography, not only on the distant colony but also on his familiar and even his familial universe.”⁵¹

⁴⁵ See Pierre Bourdieu, “The Peasant and His Body,” *Ethnography* 5, no. 4 (2004): 579–599; Pierre Bourdieu, *The Bachelors’ Ball: The Crisis of Peasant Society in Béarn* (Chicago: University of Chicago Press, 2008).

⁴⁶ Philippe Bourgois, “Homeless in el Barrio,” in *The Weight of the World: Social Suffering in Contemporary Society*, ed. Pierre Bourdieu (Oxford: Polity Press, 1999), 168–179.

⁴⁷ Wacquant, “Following,” 399–403; Paul Sweetman, “Revealing Habitus, Illuminating Practice: Bourdieu, Photography and Visual Methods,” *The Sociological Review* 57, no. 3 (2009): 491–511.

⁴⁸ *Ibid.*, 507.

⁴⁹ Wacquant, “Following,” 399.

⁵⁰ *Ibid.*, 400.

⁵¹ *Ibid.*, 403.

One of the real gems that comes out of Wacquant's larger discussion of not just photography but fieldwork in Algeria and Béarn is that the objectifying, Western ethnographic eye is relativised and contextualised as never fully objective, even allowing that it need not be incoherently subjective either. The latter part of the preceding quotation from Wacquant is fundamental to an epistemological stance that avoids dualisms and dichotomies that are constructs rather than genuinely being derived from the material of either life or the research field.

The summary that Wacquant provides about Bourdieu's photographic engagement falls into three main areas. Since Wacquant wrote his article, this trilogy of uses has been repeated in a number of places, including for example Sweetman discussed here.⁵² Attempting to summarise what Wacquant identifies as important aspects of Bourdieusian photography might be seen as questions of reporting, relating and of respite. As we noted above, however, research is not an objective, top-down process but as ethnographers of any hue can advise, is a profoundly emergent human process at every stage. This observation also draws attention to the epistemology of photographs within a larger collection of methods for collecting and analysing information about other human beings. The following paragraphs briefly restate the main points of Wacquant's exposition:

First, reporting. For Bourdieu, Wacquant states that photography provides a way of recording and storing large amounts of information.⁵³ Digital era questions of how many digital photographs are taken every day and hence the largeness of the resource, extend this issue in new ways. A comparison, however, of the large visual troves that Bourdieu collected can be seen as significant in an era where paper notebooks were still supreme in ethnographic work and even voice recorders were barely known.

Second, relational. Photographs provided Bourdieu to an important interpersonal function in several ways. He used them to connect with the local communities and at times he gave individual photographs to the people he worked with in the research field as part of their working relationship and friendship.⁵⁴ In New Zealand, Māori use the word "koha"⁵⁵ when something is given from one person to another, not necessarily of a large monetary value, that makes a statement about the relationship of the two individuals or parties. The fluidity and multi-registers of koha, between practical and friendly goodwill, can be seen in Bourdieu's use of photographs in this way. To discuss "koha" and Bourdieu's concept of symbolic domination would be to take this conversation further in linking anthropology with Bourdieusian perspectives.

Third, respite. Bourdieu uses photography to gather the moments of intensive experiences in the field, with the photographs allowing him to step back into a less pressured space where he had time to consider the events and implications of them.⁵⁶ The discussion in the first section of this article about Bourdieu reviewing photographs at much later times in his career is not this immediate point about photographs creating emotional space. It is however, a corollary of this effect of photographs facilitating an emotional distance.

Sweetman confirms the utility of the way Wacquant described Bourdieu's visual sociology. He perceives habitus as a useful conceptual tool, while also suggesting its problems such as its ambiguity, reflecting in a way the longer-term critique of Bourdieu's work, but without the

⁵² Sweetman, "Revealing Habitus," 499–500.

⁵³ Wacquant, "Following," 400.

⁵⁴ Ibid.

⁵⁵ Halaevalu F. Ofahengaue Vakalahi and Julia T. T. Taiapa, "Getting Grounded on Māori Research," *Journal of Intercultural Studies* 34, no. 4 (2013): 405.

⁵⁶ Wacquant, "Following," 402.

hostility of Jenkins and others.⁵⁷ Sweetman draws on some of the more negative critiques suggesting that in using habitus there are two areas that are problematic. The first area Sweetman sees is that habitus might be perceived as being ambiguously defined and indeterminate. The second area Sweetman identifies is that the dispositions that compose habitus are like a second nature and therefore largely pre-conscious and as such difficult to investigate. These things make habitus difficult to operationalise and it is at this juncture where photography may, according to Sweetman, contribute empirically.⁵⁸

Sweetman, however, has a particular perspective on photography. It may not only help us illuminate aspects of taken-for-granted assumptions and practices but it can also be of value “where respondents are directly involved in this process, the uncovering or illumination of habitus through visual methods may also help to effect [...] radical shifts in self-understanding.”⁵⁹ More than simply illuminating the complexities of habitus, however, Sweetman proposes to go beyond Bourdieu and sees photography as an instrument that can lead to a deeper self-understanding and to “the recognition and potential transformation of habitus.”⁶⁰ This formulation relates to Sweetman’s reporting of Chappell’s account of a practical photography project undertaken by “an 18-year-old working-class girl called Tina”. Chappell helped “Tina explore the relationships with her family”⁶¹ which led her to question the taken-for-granted beliefs or assumptions about her family relationships and her identity, developing “a reflexive, self-critical practice.”⁶² For Tina, “participating in the project enabled [her] to encounter uncomfortable truths about her family relationships and everyday life, or as she herself put it—to ‘see what I don’t want to see.’”⁶³

Almost accidentally, Sweetman has set up a dichotomy between viewing photography as mostly illuminative with the claim to “move beyond Bourdieu”⁶⁴ in this transformational story of Tina’s life. We would suggest that the admirable effect that photography had on the insight of the young woman’s life has to be applauded. This is not the same as investigating the degree and permanence of what actually changed in her life and conduct. Furthermore, this is also not the same thing as the necessity to accept a binarised epistemology between illustrative and transformational uses. There are certainly prosaic even pedestrian forms of the visual that do not challenge existing perspectives or habitus. The centrality of photography in Bourdieu’s foundational work in both Algeria and Béarn is also transformational in his conceptual and intellectual journey. For others, there can be also transformative insights without privileging the instance of an individual’s personal life-change over an academic radically new way of addressing questions of identity, personality, modernisation, marginalisation and the deracinating effects of colonial contestation.

This brings the discussion back to the ethnographic gaze of Bourgois and Schonberg relative to what Wacquant calls Bourdieu’s “wisdom of the ethnographic eye.”⁶⁵ Both Bourdieu and

⁵⁷ E.g., Richard Jenkins, “Pierre Bourdieu and the Reproduction of Determinism,” *Sociology* 16, no. 2 (1982): 270–281; Raymond Boudon, “Social Mechanisms Without Black Boxes,” in *Social Mechanisms: An Analytical Approach to Social Theory*, ed. Peter Hedström and Richard Swedberg (Cambridge: Cambridge University Press, 1998): 172–203.

⁵⁸ Sweetman, “Revealing Habitus,” 494–498.

⁵⁹ *Ibid.*, 506.

⁶⁰ *Ibid.*

⁶¹ *Ibid.*, 504; Adrian Chappell, “Family Fortunes: A Practical Photography Project,” in *Gender and Generation*, eds. Angela McRobbie and Mica Nava (Basingstoke: Macmillan, 1984): 112.

⁶² *Ibid.*, 114.

⁶³ Sweetman, “Revealing Habitus,” 504; Chappell, “Family Fortunes,” 114.

⁶⁴ Sweetman, “Revealing Habitus,” 500.

⁶⁵ Wacquant, “Following,” 399.

Bourgois and Schonberg used an extensive photographic corpus as the foundation of their ethnographic fieldwork. Bourdieu's later apparent non-use is a misnomer because his going back to the photographs was the continuation of his intellectual project and deepening of his intellectual engagement with the evidence that the photographs presented to him. Bourgois and Schonberg likewise, in starting from a large photographic body of evidence, came to their theoretical task differently. In their case, they developed over a relatively long period of time an appreciation of the conceptual work that Bourdieu had found in his photography and through other methods, and in reflecting on their own data were similarly able to apply these ideas to their own data. There is a lovely irony in Sweetman's observation that the very visibility of photographs is able to reveal what cannot be seen: "[photography] can be employed to investigate absences, the invisible and the no-longer there, thereby potentially contributing, for example, to an understanding of shifts in habitus as a response to changes over time."⁶⁶

The conjunction of visual methods therefore, as Sweetman advocates, can be profound, extending epistemological boundaries and adding to the value of other methods of inquiry.

7 Conclusion

Bourgois and Schonberg's work reflects a similar ethnographic authenticity to Bourdieu and this is established in several ways. In the first place, the many years of fieldwork suggest a commitment to a depth of understanding. A similar major parallelism in their intellectual project to Bourdieu was reliance on a substantial visual ethnographic approach and the resulting collection of photographic images. Third, Bourgois and Schonberg are conscious in their work of the macro-scale force of colonialism, the Holocaust and neoliberalism in the modern world (2002).⁶⁷ Bourdieu recognised that modernisation involves decolonisation, sudden urbanisation and many forms of symbolic violence. Both acknowledge some uncertainty in how these major themes might be filtered through their photographs and be misinterpreted through hegemonic discourses. Fourth, both are attentive to the human suffering and needs of marginalised people unfairly treated and dominated by the structures of modern society. Their engagement and commitment to the most disadvantaged groups provides insight and an edge to their intellectual reflection in conceptualising these situations within the macro-scale metanarratives of contemporary society.

These two research projects can be considered examples of this kind of in-depth research exploring difficult margins of society. Bourgois and Schonberg make use of Bourdieu's concept of habitus by working their way through the evidence and experience into which their investigations inducted them. To be clear, it is not the concept of habitus that is the first and primary point of parallel between them. It is their similar way of working, that we have explored in this article, that makes them Bourdieusian without this being a derivative term. The fortuitous use of the concept of habitus by Bourgois and Schonberg occurs as a consequence of a similar way of investigating the social world. For both Bourdieu and Bourgois and Schonberg, the idea of habitus and related concepts do not spring fully-formed to be neatly applied by other scholars. We have hinted, at various points in this article, about the wider story for Bourdieu: that habitus was provisionally and tentatively developed in his early writings but without the connections and conceptual infrastructure that he later elaborated. Similarly, Bourgois and Schonberg, both in their early writing and their accumulation of photographic data, begin in a provisional way to think about and theorise about what they were finding. Their gradual convergence with

⁶⁶ Sweetman, "Revealing Habitus," 507.

⁶⁷ Schonberg and Bourgois, "The Politics of Photographic Aesthetics," 389.

Bourdieu's idea of habitus is a resultant effect of a similar way of working in the field, of which photography was a distinctive parallel component.

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The *Burakumin* Identity in Relation to the Local Community and the Dominant Society¹

Abstract | The *Burakumin*, a group of socially marginalized people in Japan, has been traditionally considered impure by the majority of Japanese society. In order not to spread the impurity, its members have been geographically and socially restricted, living in communities on the edges of cities, limited in social interactions, marriages and job opportunities. The identity of the *Burakumin* has always been constructed through the dominant society as well as through their own local communities, although the character of this link has been ambiguous. Our article discusses this ambivalence as it evolves through time, with a particular focus on how the *Burakumin* sense of identity makes its holders lean toward incorporation into the community at large, and the factors that encourage them to favour separation or incorporation. In the article, we also work with *Burakumin* identity as formed by the process of self-identification and outer categorisation.

Keywords | Identity – Social identity – Social exclusion – Discrimination – Community

Acknowledgements | We would like to thank Professor Richard Feinberg for his time, effort and guidance that helped us further improve the quality of the paper. His continuous support and interest in our work are more than appreciated.

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1 Introduction

Identity, as one of the core concepts in the humanities, is demonstrably contextual. It has been elaborated with respect to gender or ethnic, political, national, social, or minority status, and always within a specific context. In this article, we discuss *Burakumin* social identity through an analysis of the interaction of the *Burakumin* with other members of their community and with members of the dominant society. *Burakumin* identity is approached as an entity formed by the processes of self-identification and outer categorisation (made by the dominant society), analogous to Brubaker's approach to identity.² This ambivalence proved to be a major characteristic of the *Burakumin* relationship towards dominant society and their local community as each side has the potential to provide the other with safety or better life opportunities, as well as limit their social interaction or affect their well-being. Our goal is to provide a new perspective on the *Burakumin* past and present as a process of defining of who the *Burakumin* are, where they belong and how they traverse the imaginary borders of the community and the dominant society.

¹ This study was written with the support of the Ministry of Education, Youth and Sports, grant project IGA_FF_2019_023 (Integrovaný výzkum v sociálních vědách 2019).

² Rogers Brubaker, *Grounds for Difference* (Cambridge, Massachusetts: Harvard University Press, 2015).

The *Burakumin* (部落民)³ is a group of social pariahs living in Japan. Their name consists of the words *buraku* and *min* which can be translated as people of the hamlet. Although the people do not differ from the general Japanese population in race or language, the *Burakumin* are considered the largest minority in Japan and are not always counted among the so-called “pure” Japanese. The main features of many *buraku* communities are limited life opportunities and geographical and social marginalization, living on the periphery of cities or ghetto-like districts. The root of the *Burakumin* exclusion has been their believed impurity (*kegare*), originating from their traditional professions involving close contact with polluting substances, such as blood, meat or dead bodies.⁴ Today however, *kegare* plays a much smaller part in *Burakumin*’s discrimination due to socio-political changes in Japan.

The *Burakumin* do not form a homogeneous or unified group, and the category itself is quite unclear, as it may cover people of various backgrounds who do not necessarily self-identify with the *Burakumin*. For that reason, we emphasise the difference between those who identify themselves as *Burakumin* and others who may be categorised as ones due to certain shared characteristics but do not feel a part of the *Burakumin* social group.

Scholars from Japan and abroad, some of *buraku* origin, have been studying the *Burakumin* since the early twentieth century.⁵ The most intensively analysed topic regarding the *Burakumin* has been their history: looking for the group’s origin, reconstructing their historical development, or trying to clarify the relation between their status as social pariahs and ideas of impurity.⁶ More recent studies focus on the twentieth century when the *Burakumin* rose to political action⁷ or the assumed end of the *Burakumin* issue.⁸ Smaller contemporary studies often address particular areas of anti-*Burakumin* discrimination in such areas as marriage or education.

Burakumin identity is a recent topic that has been explored in relation to the *buraku* community, the dominant society and changes in the tension between the two. Our article provides a fresh view on *Burakumin* identity formation as a dynamic process, characteristic of the fluidity of the group’s position in the broader society, as well as the continual evolution of its status. Particularly salient is the extent to which *burakumin* look inward toward their own community or outward toward the broader community for an understanding of who and what they are, and how they traverse between both sides in search of their place in society.

³ The specialised literature contains both *Burakumin* and *burakumin*. We have chosen the first option due to English stylistic rules for the names of official groups.

⁴ The concept of purity appears in both Shintō and Buddhism and is tightly connected to the mental and physical well-being of people and their prosperity. *Kegare* is perceived as dangerous because it brings sickness, misfortune, and death to the person and those around. It negates life and getting rid of it requires ritual cleansing.

⁵ E.g., Ninomiya Shigeaki, “An Inquiry Concerning the Origin, Development, and Present Situation of the Eta in Relation to the History of Social Classes in Japan,” *Transactions of the Asiatic Society of Japan*, 10 (1933): 49–154.

⁶ Hiroshi Wagatsuma and George De Vos, *Japan’s Invisible Race: Caste in Culture and Personality* (Berkeley: University of California Press, 1966); Carol Gluck, *Japan’s Modern Myth: Ideology in the Late Meiji Period* (Princeton: Princeton University Press, 1985).

⁷ Timothy Amos, *Embodying Difference: The Making of Burakumin in Modern Japan* (New Delhi: Navayana Publishing, 2011); Flavia Cangià, *Performing the Buraku. Narratives on Cultures and Everyday Life in Contemporary Japan* (Berlin: LIT Verlag, 2014).

⁸ Ian Neary, “Burakumin at the End of History,” *Social Research: An International Quarterly* 70, no. 1 (2003).

2 The Rise of the *Burakumin*

The *Burakumin* identity as a group is in great part formed through the interaction between the local community and the dominant society. They are not in an equal position, however, as one of them often dominates over the other. Up until the nineteenth century, *Burakumin* identity was strongly moulded by the dominant society and its holders were perceived as impure because of their occupation, and due to increasingly limited social space and mutual interaction due to the social system. Despite their official emancipation, neither the *Burakumin* nor mainstream society has been ready to accept the equal status of the marginalized group, which caused an increasing tension between them.

The exact time of the *Burakumin* emergence is discussed, although they were socially and geographically defined during the seventeenth century with the establishment of the Tokugawa shogunate. What before was an indistinct mixture of people of different professions and social conditions, has now become a distinctive social class. They were a class, however, that stood apart from the official four-class society of Japan. They were categorized into *eta* (穢多) and *hinin* (非人), two groups difficult to clearly define due to distinct regional differences. They often lived in the same areas at the edges of cities and in villages, performing diverse professions. The Tokugawa regime brought in a highly constrictive society and subsequently, the life of *eta-hinin* grew limited. The government edicts restricted their movement in the public areas and forced them to manifest their identity to prevent the “contamination” of common people. According to Shigeaki, the *eta* were limited to endogamy marriages, had to wear specific clothes and hairstyles, and were not allowed by law to freely socialize with the non-*eta*.⁹ Most of the *eta* performed various professions processing animal carcasses (meat and leather), as well as working in the fields as farmers.

The Tokugawa regulations had several important implications for the life of the marginalized groups. By limiting their place of living, the social pariahs grew closer and created larger communities concentrated in certain areas at the edges of cities and villages. These areas were remote enough for the common people to be able to avoid the pollution. It was a clearly designated space, visible but out of sight. Thus, a geographical and symbolic border was created between the impure and the commoners, reinforced by the required endogamous marriage.

Despite the homogeneity, assumed by dominant society, of the *eta-hinin* represented by a specific hairstyle and clothing, the diversity among its members endured. The class was composed of *eta* and *hinin*, both labelled as impure, although for different reasons. *Hinin* were people living on the edge of society: street artists, beggars or criminals moving through the cities and villages, some also between realms, interacting with the divine world as diviners and fortune-tellers. With no home, with strange abilities or a bad reputation, they were considered polluted and potentially dangerous. Unlike the *eta*, however, they could in some cases change their social condition and status by adopting another profession or through exoneration of their crimes.¹⁰ The *eta*'s profession was hereditary, however, with their social status established by the social structure together with the place of residence, offering no escape.

The rigid Tokugawa regime deteriorated during the nineteenth century. The year 1868 marks the end of the feudal system and the beginning of the Meiji era (1868–1912) followed by the modernization process of Japanese society. The western world played an important role model in the political and social changes and the nation's goal was to assume its “rightful place” among the modern states. The four-class system was abolished. People were united as citizens under

⁹ Shigeaki, “An Inquiry,” 97–98.

¹⁰ Wagatsuma and De Vos, *Japan's Invisible*, 20–21.

the Emperor's rule, differentiated by status as commoners, gentry and nobility. The commoners, *heimin* (平民), were once again a diverse mass of people, no longer defined by their occupation or residence, and of equal rights.

The Emancipation Act (*Mibun Kaihō-rei* 身分解放令) of 1871 pronounced the *eta-hinin* equal to other commoners, promising them the same social standing and freedom of occupation. *Shinheimin* (新平民), translated as new commoners, appeared as yet another name for the marginalized, which again emphasised their distinct status. Several reasons led to the edict, the political and economic ones prevailing; the *eta-hinin*'s limitation to certain professions hindered the establishment of a free labour market, and the existence of the social pariahs posed a potential shame to the aspiring modern nation, demonstrated by comments written by observant international visitors.¹¹ At the same time, the discrimination of the former *eta-hinin* escalated. According to the authors Wagatsuma and De Vos, financial problems among the commoners caused social unrest and dissatisfaction with the government's new policies, to which the *shinheimin* became an ideal target.¹² The outcasts served as scapegoats and an outlet for negative emotions, falling victims to the so-called *eta* hunts.¹³

The Emancipation Edict was supposed to remove the obstacles preventing the *eta-hinin*'s inclusion among the commoners. They were officially relieved of their status as social pariahs, free to pursue any profession and change their place of living. The dominant society attempted to push the new commoners back to the social edge. Petitions and demonstrations were organised, denying the new status of the *shinheimin* and demanding the abolition of the new law. The reasons stated by the commoners were either the unwillingness to abandon the traditions and former social order, or repulsion upon the social promotion of the impure.¹⁴ Elevating them to commoner status implied, of course, lowering the commoners to the level of the impure, dishonouring them and endangering them with impurity. It became gradually clear that the social situation required a change which needed to come from the discriminated themselves.

3 The *Burakumin* Emancipation

The introduction of the western world to Japan brought about several changes. Apart from the economic impact (industrialisation, free-labour markets, etc.), necessarily subsequent social and political changes took place and transformed people's view of the world, society and their place in it. In the last twenty years of the nineteenth century, the government set a new goal of creating a united nation under imperial rule comparable to the European political systems. The introduction of mandatory education for all citizens represented an important step towards the modern state. At the same time, the new era brought changes in the economic system and caused economic struggle for people of various professions. To survive, many Japanese were forced to relocate to large cities (Tokyo, Osaka, Kyoto) which led to the creation of slum areas in many cities around the country.¹⁵ These poor areas were often locations inhabited by the former *eta-hinin*. Their number differed by each region, some seeking new professions, getting rid of their link to the impure, others remaining in the community, tied by family relations and community.¹⁶

¹¹ Amos, *Embodying*, 119–120.

¹² Wagatsuma and De Vos, *Japan's Invisible*, 35–36.

¹³ Mikiso Hane, *Peasants, Rebels, and Outcasts: The Underside of Modern Japan* (New York: Rowman & Littlefield Publishers, Inc., 2003), 144–145.

¹⁴ Wagatsuma and De Vos, *Japan's Invisible*, 35.

¹⁵ Amos, *Embodying*, 123.

¹⁶ *Ibid.*, 129.a

The relationship between the *eta-hinin* and the *Burakumin* is quite unclear as each category is defined differently. Whereas the former existed within a rigid social structure with strict limitations of residence and hereditary social status, the *Burakumin* has not been bound by either of them by law. Although quite a high number of the *Burakumin* may have *eta* ancestry, the required link to the place of residence or certain professions associated with the *eta* do not exist any longer. Therefore, the *Burakumin* are generally closer to being a social category sharing certain commonalities similar to other marginalized groups, such as living in impoverished areas, often performing menial jobs and experiencing discrimination or stigmatisation. Because family lineage plays an important social role in Japanese society and is kept in the family registry (*koseki*), the *Burakumin* are also recognisable via the lineage.

At the end of the nineteenth century, the former *eta-hinin* and the newly impoverished ones, slowly became known as the *Burakumin*. The name through time received a negative connotation, pointing to impoverished areas where diverse social and economic outcasts gathered, sometimes with no apparent connection to the former *eta-hinin*. In this way, the term *Burakumin* grew more imprecise, and the *buraku* area became the dominant factor for the *Burakumin* categorisation by the dominant society. The supposed “impurity” has shifted to insufficient habit of hygiene, lack of morals or high criminality due to the bad living conditions, which they were often associated with, and became frequently criticised for by the dominant society.¹⁷ In reaction, the government launched the *Yūwa* (融和) movement whose goal was to motivate the *Burakumin* to self-improvement and better integration within the existing society.¹⁸ Reactions differed, however, among the *Burakumin*.

The young *Burakumin* refused to accept blame for their discrimination. Learning about the world, and western culture in particular, brought diversity of opinions to the Japanese. The commoners, now more educated, began to organise small associations and clubs, sharing their opinions about the political and social situation of the nation.¹⁹ At the beginning of the twentieth century, the *Burakumin* youth created a network to share their growing dissatisfaction with the government’s attitude towards them. The spread of social and liberal ideas through Japan, the demonstrations (rice riots) in the 1918 over the high price of rice and consequential social unrest, led to the creation of the national movement *Suiheisha* (水平社 Levelling Society), which represented an important turning point in the self-identification of the *Burakumin*.

In 1922, a group of 3,000 *Burakumin* met in Kyoto to discuss their situation and establish a new goal. The *Burakumin* were supposed to unite across the nation and fight the oppressing society in order to finally achieve the promised emancipation.²⁰ They defined themselves as part of the poor and discriminated mass, exploited by the ruling class. The *Suisheisha* declaration also contains elements of Christian rhetoric, visualising the *Burakumin*’s ancestors as martyrs whose blood was shed for the society and using the image of the thorn crown as a flag motif. The society fought in the name of humanity, equality of all people, and economic and occupational freedom. The main tool for reaching those goals was through political power and education of both, the discriminated and the discriminators.²¹ The former rose to fight for their dignity and humanity. The discriminators were educated by the *Suiheisha* members, forced to apologize publicly for their transgressions against the *Burakumin*. This denunciation strategy, known as *kyūdan*, was a double-edged sword, however, empowering the discriminated, but also

¹⁷ Amos, *Embodying*, 133.

¹⁸ Neary, *Political Protest*, 44.

¹⁹ Gluck, *Japan’s Modern*, 22.

²⁰ For the declaration of the *Suiheisha*, see Wagatsuma and De Vos, *Japan’s Invisible*, 45–46.

²¹ Cangià, *Performing*, 82.

raising hostility towards *Suiheisha* (and consequently the *Burakumin*) for its frequently violent conduct, such as beating or publicly shaming the discriminators. It was often seen as justifying the already negative opinion of the dominant society about the *Burakumin*.²² Nevertheless, the movement fought discrimination in many areas of social life, including schools, the military, rights of women, etc. It disbanded in 1942.

After World War II and the promulgation of the new Constitution, guaranteeing the equality of citizens regardless of differences of religion, race, belief, social status or family background, the *Burakumin* issue came again into sharp focus. A new movement, later known as the Buraku Liberation League (BLL), was born, continuing the *Suiheisha*'s goal of *Burakumin* liberation and education. Attention was turned to two aspects. On the one hand, the origin of the *Burakumin* and their history became a topic of study. On the other hand, there was the current social, political and economic situation in which the *Burakumin* lived and which required a change. Among the many theories on *Burakumin* liberation, the one of Kiyoshi Inoue is most valid, for it concentrated on the poor economic and living conditions of the *Burakumin* and their improvement, rather than the more abstract struggle over class identification.²³

In 1965, a clear definition of the *Burakumin* was declared by the government. It stated that the *Burakumin* people are of the same race and nationality as other Japanese. Their discrimination was understood as a remnant of the premodern conceptions lingering in people's minds for which they were denied their civil rights and marginalized during social interaction with the dominant society. The core of the problem lay in the division between the *buraku* areas and other communities in the neighbourhood.²⁴ Better integration or assimilation into society was therefore needed. From this moment on, the *Burakumin* are officially defined and identified by their place of birth or residence, as well as the lineage to some extent, as both are parts of the family register in Japan.

In the same year, a report was published by the *Council for Burakumin Assimilation*, a governmental organisation of which *Burakumin* were part, documenting the atrocious living conditions in the *buraku* areas. An extensive governmental project²⁵ was launched in support, improving the life of the people in the *buraku*. Apart from the renovation of the vast number of targeted areas and financial support to small *Burakumin* companies, the project focused on educational programmes in schools not only to increase the level of education of *Burakumin* children, but also to create textbooks and curricula concerning *Burakumin* history. More recently, the lessons have focused on human rights issues attended by all students.²⁶ Education is thus seen as a way of creating a more tolerant society, in which members are aware of discrimination or any type of violation of human rights, and learn how to defend against them.

The twentieth century brought about an important transformation of *Burakumin* self-conception and categorisation. The *buraku*, *impoverished* areas where former *eta-hinin* and newly impoverished people gathered, became a basic identifier of the *Burakumin* by mainstream society and the government. Due to increasingly unhygienic conditions and criminality, the discrimination worsened, rationalised by the *Burakumin*'s inadequate social habits and integration effort. The poor social and economic conditions gave rise to political activism among the *Burakumin*, first as the *Suiheisha* and later as the BLL. They aspired to eliminate discrimination and achieve

²² Wagatsuma and De Vos, *Japan's Invisible*, 46.

²³ Amos, *Embodying*, 156.

²⁴ Cangia, *Performing*, 89–91.

²⁵ *Law on Special Measures for Dōwa Project*, in which *dōwa* (同和) represents full social integration or assimilation of the *burakumin* to end their discrimination.

²⁶ Yasumasa Hirasawa et al., *Dōwa Education: Educational Challenge Toward a Discrimination-Free Japan* (Osaka: Buraku Liberation and Human Rights Research Institute, 1995), 12.

real equality for the *Burakumin* through action, such as denouncing the discriminators and accenting the bad living conditions. As of the 1960s, the government and the BLL worked together to improve the *buraku* areas and their inhabitants' lives. They launched an extensive project of promoting children's education on the *buraku* issue, anti-discrimination and human rights lessons. For 40 years, they worked to promote *Burakumin* well-being. Today, due to the project's termination in 2002, the educational and social activities depend mostly on the local *Burakumin* associations.

4 *Burakumin* Identity – Self-identification and Categorisation

As we have shown above, the *Burakumin* as a social group has gone through tumultuous times throughout their history. In the past, the dominant society tried to push the social pariahs to the social margins and blamed them for their condition. Due to the social and political empowerment, the *Burakumin* shifted the status quo by drawing attention to the discrimination and bad living conditions for which they held the existing society to be at fault. The oppositional forces of self-identification of the *Burakumin* and categorisation of the group by the dominant society continue to influence the *Burakumin* in general as well as each individual member of the group.

Due to considerable regional differences among the *buraku* communities in Japan, it is impossible to generalise the *Burakumin* as one homogeneous group. People of different nationalities (e.g., Koreans or Chinese), a bad economic situation, socially marginalized or of criminal background often concentrate in the *buraku* and can be categorised as *Burakumin* by the dominant society. In some cases, a profession such as leather-processing is used to represent the *Burakumin* and their fight for human rights. *Taiko* drum-making is one of those examples. On the one hand, it represents a part of the national cultural heritage, while on the other, it is used as a positive image of the *Burakumin*. The *Ikari* group in Osaka uses music, for example, to fight the prejudice.²⁷ There are also activist groups which organise events and exhibitions with a more educational or political focus, involving children and adults from both sides in the human rights issues. It enables Japanese society to recognise *Burakumin* discrimination as a general problem of inequality.

The inner heterogeneity of the *Burakumin* brings a problem of their identification for research. The categorisation of residents of the *buraku* area as *Burakumin* may lead to great imprecision, as people of a different background and socio-economic situation inhabit the same area without a clear connection to the *Burakumin*. They could be, however, considered part of the category as: 1. the term *buraku-min* (hamlet people) characterises its members by place of origin or current residence, which may cover an entire range of different people; 2. the *buraku* inhabitants (whether *Burakumin* or non-*Burakumin*) may face similar prejudices as the *Burakumin* or share the (past or present) experience of discrimination. The same applies to those of the *Burakumin* who try to escape discrimination by leaving the *buraku*, but are later identified by the dominant society. People in positions of power quite often use family registers illegally to secretly check on the genealogy and residence of a Japanese household to prevent the *Burakumin* from becoming their employees, tenants or partners. It therefore contributes to the continuation of the prejudice and discrimination of the *Burakumin*.

A researcher might focus on those who identify themselves as the *Burakumin*, but it would severely limit the research to those regions where the *Burakumin* identity is strong and would not include those of the *Burakumin* who, due to discrimination, avoid the connection with the

²⁷ Cangià, *Performing*, 129–130.

group. Although the *Burakumin* activists are quite strong in places such as Osaka or Kyōto, there still exists a strong taboo in society when it comes to their existence and discrimination.

Identity is considered a never-ending process of construction of the self through interaction with the outside world, be it family, members of one's community, peers, teachers or members of the dominant society. In the case of the *Burakumin*, the personal and indirect experience within and outside of the local community, the approach of the community and the dominant society toward the *Burakumin* issue and the interest of an individual in it, and many other factors play a part in the formation of the identity of each *Burakumin* member.

Research on *Burakumin* identity has come into focus in recent decades. There are various reasons for this, such as the academic preference for historical reconstruction, or the belief that the *Burakumin* have successfully assimilated into society. The attempts to study the identity of the *Burakumin* can be divided into those of BLL activists and academics. The first group has constructed a model based on the *Burakumin* approach to discrimination, dividing them into 2 groups: they either fight the discrimination due to their strong self-awareness or avoid it because of a lack of self-awareness.²⁸ The model not only oversimplifies the complexity of identity itself but also confuses self-awareness with a positive value of the *Burakumin* identity and a possibility of avoiding a dangerous discriminatory situation. The fluidity of identity is also not taken into account.

A far-more detailed model of *Burakumin* identity was created by Kazuya Matsushita at Osaka Kyoiku University. It consists of four ideal types of identity, as it has been reviewed by Bondy.²⁹ Based on interviews from 1995 and 1997 with 21 families from different *buraku* in Osaka, it focuses on youth between 18 and 25 of different social status and gender who self-identify themselves as *Burakumin*. The main topics of the study are the experience and opinions on life as a *Burakumin* in the *buraku*. Apart from the interviews, the researcher considers the background of each informant and the possible impact of family, school and *dōwa* education in their self-perception as *Burakumin*.

According to the data gathered, Matsushita categorises identity as follows:

1. a strong *buraku* identity type,
2. a multiple-identity type,
3. a conflicted type,
4. a moratorium type.

The first type, a strong *Burakumin* identity, belongs to a person willing to openly call themselves a *Burakumin*. According to Matsushita, this identity dominates over person's other identities. Thanks to its stability, the *Burakumin* can fight the discrimination, mentally endure it and challenge it, if necessary. It may be considered a final stage of the identification struggle and often belongs to those actively involved in the *Burakumin* issue. Unsurprisingly though, even the most confident *Burakumin* do not need to show their identity on every occasion, but only if deemed appropriate. "[...] Kumisaka Shigeyuki, secretary general of the [BLL], son of a leather tanner [...], who frequently appears in public as Buraku, does not in all social situations produce indexes of being Buraku, [...] nor does he feel the need to."³⁰

²⁸ Cangià, *Performing*, 98.

²⁹ Christopher Bondy, "Book Review: 18-nin no Wakamonotachi ga Kataru: Buraku no Aidentiti (18 Youths Discuss Buraku Identity)," *Social Science Japan Journal* 7, no. 1 (2004): 151.

³⁰ Joseph D. Hankins, *Working Skin: Making Leather, Making a Multicultural Japan* (California: University of California Press, 2014), 62.

A multiple-identity type may also present a final stage of identity but requires a longer process for its formation. An individual goes through times of confusion and struggles with himself/herself repeatedly. Finally, the *Burakumin* identity becomes part of a set of other identities, but more passive and of secondary importance. A person of multiple-identity interacts with people within and outside of their community and the broader social contacts and experience may more easily turn them towards life among the members of the dominant society.

A good example of the process of self-identification in the multiple-identity type is Ayako, a middle-aged woman. Ayako, living outside *buraku*, had no previous knowledge of her *Burakumin* origin until she was fourteen. After finding out through the family register, she experienced bewilderment and ignorance from others. It took her many years before she dealt with the fact of being of *Burakumin* origin, telling it later only to the closest people in her life and her future husband. Although she has never met with any discrimination and there is little chance of her origin being discovered, she expresses her worries over it, fearing that she might be subjected to contempt or discrimination.³¹

A counter-example to Ayako is Yūta, a boy from a local *buraku*. He attends middle school with other children from his *buraku* and became aware, thanks to classes, of *Burakumin* history. He plays football and goes to a cram school,³² which is unusual for children from the *buraku* community. The social interaction with children inside and outside of his community positively affects his self-esteem and improves his chance of better integration into the majority society. This can also mean alienation from his community and peers of the same origin. “I sometimes talk to Seiji [a *Burakumin* classmate] but not with other Toda youths. My favourite friend is now someone else; [...] from another area. I have quite a few friends. But most of them are not Toda youths [*buraku* area].”³³

The third type of identity is the moratorium. It has a rather situational character. The *Burakumin* background is only revealed when deemed important. According to Bondy, identity may be established in the background but only emerges when the moment requires it and is changeable. It differs from the multiple-identity type by the lack of confusion during the formative phase of identity.³⁴ The monkey-trainer Kōhei is a *Burakumin* working in a traditional *Burakumin* profession. He does not use it, however, as a representation of the *buraku* culture. Instead, he considers the monkey-training (*sarumaiza*) a Japanese art without the necessary connection to the *Burakumin* past.

This is not a matter of pride for us. Our training is not related to a need to emphasize our background as *buraku* people. [...] Of course, I am still aware of all the efforts made by my ancestors [...] who struggled against discrimination [...] [but] Sarumaiza does not want to communicate all the pain [...].³⁵

Although he knows about his *Burakumin* origin and does not shy away from it, he stresses his profession over his background, for it provides his identity with a positive value and is valued by the Japanese people in general. The *Burakumin*, on the other hand, often relate to the

³¹ Stephen Murphy-Shigematsu, *Multicultural Encounters: Case Narratives from a Counseling Practice* (NY: Teachers College Press, 2002), chapter 5.

³² “A private institution specializing in preparing students for examinations; (in later use) specifically such an institution in East Asia (especially Japan) or serving students of East Asian (especially Japanese) descent.” Definition by *Lexico*, accessed 5 November 2019, https://www.lexico.com/en/definition/cram_school.

³³ Ken N. Shimahara et al., *Ethnicity, Race, and Nationality in Education: A Global Perspective* (New Jersey: Lawrence Erlbaum Associates, 2012), 87.

³⁴ Bondy, “Book Review,” 152.

³⁵ Cangià, *Performing*, 58–59.

discriminatory past as part of their identity, creating a symbolic barrier between themselves and the members of the mainstream society. Kōhei uses *sarumaiza* to surpass it.

The conflicted type of identity is tied to the local community and the *buraku*, which provides a sense of safety compared to space outside of it, and limits the personal relationships mostly to the members of the community. The *buraku* is an area of comfort and understanding where the *Burakumin* feels equal to others and at ease with themselves. The dominant society, on the other hand, represents a place of uncertainty and discomfort.³⁶

At least inside the *buraku* I am the same as everybody else because we are all so-called *Burakumin*. Nobody here judges me as better or worse than they are, except through my own merits and defects. So a bad type in the *buraku* is rightly judged as a bad character because of what he does, not because of where he was born.³⁷

In the process of identity formation or change, social interaction is essential, with both *Burakumin* and non-*Burakumin*, for both have the necessary impact on the individual's self-perception. During their lives, *Burakumin* move between the local community and the dominant society, going through diverse social experiences. Both sides have something to offer and to take away. The dominant society can offer the anonymity of a large crowd and the feeling of more possibilities. Not bound by the limitations of the *Burakumin* social status, an individual's horizon widens. The worry about the exposure of one's origin, however, as well as the lack of support from the community can have a detrimental effect on physical and mental health.

One's community can, however, be limiting, as the older *Burakumin* have direct experience of discrimination and share it with the youths. Therefore, the fear of discrimination grows in the children even without actual experience of it and necessarily affects their interaction with the dominant society with distrust and worry. Another limitation lies in the safety of *buraku*, for those who wish to leave it often lose its support. To hide in anonymous mainstream society and avoid discrimination due to the *Burakumin* origin means limiting contact with the *buraku* community, direct supports of its members and a feeling of understanding from the shared experience.

5 Tipping the Scales of Identity

The interaction of *Burakumin* between the members of their community and the dominant society is part of their daily life, although its intensity and frequency vary. The daily social interactions which take place within and beyond the community, like school or the workplace, represent a space where *Burakumin* face potential discrimination but also understanding from the non-*Burakumin*. Most *buraku* youths enter the space outside the local community with a prior understanding of what they might experience there. This being where family and community play a primary role in the youth's initial attitude towards the majority.

In general, the family provides an individual with safety and support, shaping one's view of the world and oneself. Parents are the first to shape a child's identity, based on their own knowledge and experience. For the *Burakumin*, family also provides a framework for one's approach toward the issue, by giving it a positive or negative value, or ignoring it altogether. It subsequently influences the type of peers the youth interacts with, their attitude toward their community and dominant society, and their self-perception.

³⁶ Bondy, "Book Review," 152.

³⁷ McLauchlan, "Solving," chap. 4.3.

The parents' approach to the *buraku* issue can vary and is related to Matsushita's identity typology. If the parents have a strong *Burakumin* identity, they will probably raise their child with pride of his origin, knowledge of the group's history and human rights issues. If there is a BLL group related to their *buraku*, the teen might join a youth club and take part in its activities. A boy named Senji serves as a good example: his father is a leader of the local BLL. Senji, himself, is deeply involved in the *Burakumin* youth club and recently joined its taiko band.³⁸

The family may also choose to ignore or conceal its *Burakumin* identity, limiting the contact of family members with the local community to varying degrees. They do so out of fear of discrimination, shame about their origin, or to seek better life opportunities in education, professional life, marriage, etc. As a result, the child either interacts mostly with the non-*Burakumin* and rarely participates in *buraku* events or is not even aware of his origin and resides outside the *buraku* (as Ayako). Kenji, a *buraku* boy, comes from a rich family and as a successful student aspiring to go to university rarely interacts with *Burakumin* children. Distancing himself from the community may help Kenji and his family integrate into the dominant society and avoid discriminatory situations.³⁹

School is where students often learn about *Burakumin* history and human rights issues.⁴⁰ The topic was discussed in the integration education classes (*dōwa*) up until 2002 and today it is defined as multicultural education. Both types of education focused on various minorities living in Japan, as well as the *Burakumin*. The classes are also often complemented by community centres or associations where children learn about their history and culture (such as BLL).⁴¹ The classes dealing with the *Burakumin* issue may be nationally or locally focused, teaching about general *Burakumin* history or connecting children with the local communities and their activities. Guest speakers or teachers discuss various topics connected with the *Burakumin*, often derived from personal experience. Through dialogue, they help *Burakumin* children share their opinions and worries, strengthen their self-esteem and mutual co-operation, and teach them how to manage on their own in various social situations. The lessons therefore aim to create a positive identity and pride in being *Burakumin* and about the *buraku* community. Just like parents, teachers' attitudes affect how children perceive their future. It may also serve as a tool to strengthen solidarity toward the *buraku* community.

When you get out of school and marry, you **will** run into discrimination [...] You or someone around you **will** face discrimination. If you face it on your own, chances are you'll fail. It's important to work together. The more we work together, the stronger we are.⁴²

Frequently, even children active in those classes and involved in their youth clubs struggle with their identity disclosure and worry about acceptance by the non-*Burakumin*. Many *Burakumin* consequently maintain contact with their *buraku* friends after their separation, feeling a camaraderie about the shared burden of their origin. "I can only talk about *buraku* issues with my friends from Takagawa junior high school. I don't feel like I'm close enough to my high school friends."⁴³

³⁸ Shimahara, *Ethnicity*, 85.

³⁹ *Ibid.*, 85–86.

⁴⁰ The *dōwa* education.

⁴¹ Miki Y. Ishikida, *Japanese Education in the 21st Century* (Lincoln: iUniverse, 2005), 246.

⁴² Christopher Bondy, "Lessons from School, Lessons for Life: Education of an 'Invisible' Minority in Japan – The *Burakumin*," *The American Sociological Association Annual Meeting* (Hilton San Francisco, CA, August 8, 2009): 11. Available at: AllAcademicResearch.

⁴³ Christopher Bondy, "Learning About an Identity: Schools and Buraku Youth," *Human Rights Education in Asian School* 7 (2009): 96.

The attitudes of the non-*Burakumin* children towards their *Burakumin* classmates vary. Since the topics covered in the curriculum of the multicultural classes differ from school to school, there are also differences among the non-*Burakumin* in their knowledge of the *Burakumin*. It ranges from having quite intimate to no knowledge about the *buraku* issue. Therefore, it may be difficult for the *Burakumin* to predict the reaction of others to their identity revelation, which may increase the internal struggle and worry. The discrimination at school, however, is less common than in the past, partly because of education focused on human rights issues and discrimination, but also because the *Burakumin* issue has been made taboo. Consequently, Japanese youths sometimes lack any knowledge about who the *Burakumin* are as it is not a commonly discussed topic in public.

Occupation is one of the areas in which *Burakumin* discrimination still occurs. Many *Burakumin* perform menial or low-paid jobs on construction sites or in public services as access to employment in large corporations is limited despite *Burakumin* education rising significantly thanks to the government project mentioned earlier. Cases of discrimination also appear repeatedly in professions dealing with carcasses, such as in slaughterhouses or leather manufacture. The workers are called impure and, according to Sunda, endure heavy discrimination. Although the meat processing takes great skill and decades-long practice, the workers in a Tokyo slaughterhouse answer with hesitation when asked about their profession, fearing discrimination against themselves and their families.⁴⁴ The earlier-mentioned Ikari taiko group uses music to educate visitors about *Burakumin* discrimination and history, to praise their community and celebrate their craft through the sound of the drums they have created.

We want to show who the Taiko creators actually are. With our music we want to talk about who produces this instrument, [...] about Buraku people [...] to change the understanding of the Buraku work and traditional culture. [...] we play hard [...] not only to combat discrimination [...] [but] to change [the] perspective [of Taiko makers] towards this profession.⁴⁵

The last area to which the *Burakumin* identity relates, is marriage. Before the modernization of Japan, the *eta-hinin* were limited by law to endogamy. Since then, the *Burakumin* has been increasingly intermarrying with members of the majority. Despite the increasing frequency, however, prejudice against such marriages still exists.⁴⁶ Families oppose establishing relations with *Burakumin* out of fear of dishonour and malicious gossip, which has a great social power in Japanese society and can affect other family members and their interaction within the neighbourhood. “I was invited to a wedding but I was also told to be discrete and not to say anything about the guy’s parents and origins. [...] I was sitting in his father’s seat, and his parents were not invited to participate.”⁴⁷

Life in the *buraku* can present a challenge for the non-*Burakumin* partner in marriage as they need to learn how to cope with the new label. The mental strain of adaptation to life in the *buraku* can be particularly difficult for the non-*Burakumin*, as they lack the previous familiarity with the community, its struggle or discrimination altogether. On the other hand, the strain on the *Burakumin* living outside of their *buraku* might be of a similar difficulty. Departure from the *buraku* may be welcomed, as it lowers the chance of experiencing discrimination and represents

⁴⁴ Mike Sunda, “Japan’s Hidden Caste of Untouchables,” *BBC*, accessed December 29, 2018, <https://www.bbc.com/news/world-asia-34615972>.

⁴⁵ Cangià, *Performing*, 157–158.

⁴⁶ Charlie V. Morgan, “A Case Study of Buraku and Non-Buraku Couples in Japan,” *Journal of Comparative Family Studies* 38, no. 1 (2007): 31–54.

⁴⁷ Cangià, *Performing*, 211.

the possibility of economic improvement. As we have explained above, however, leaving the community means losing the social support which many *Burakumin* are taught to rely on. The acceptance of the non-*Burakumin* family is uncertain as well, as cases of rejection sometimes even occur after children are born.⁴⁸ We should keep in mind, however, that most studies focusing on the topic of *Burakumin* marriage highlight cases on each end of the scale, and do not address couples that interact with both, the local community and the dominant society. It might be related to specific areas in which research is conducted and which are quite diverse, or it may be due to a focus on those couples who face the most serious difficulties because of their status.

As we have shown above, identity is related to several social institutions which connect an individual with the *buraku* community and the majority society. The constant interaction with both sides influences an individual's self-perception and their attitude towards members of each group. The family shapes the child's initial attitude towards oneself, the community and the dominant society, encouraging it to engage or ignore each group depending on their own experience and self-identification. School, on the other hand, presents an opportunity for *Burakumin* children to open up to new social experience and engage with the world outside their community. The multicultural education supplied by schools and various associations help the youths learn of their origin, prepares them for a future in which discrimination might occur, and strengthens the link to the local community. A similar role may be played by the professions which are presented by the *Burakumin* as traditionally connected to the group, shown via the example of the *Ikari*. The last topic has focused on intermarriage and its possible consequences for each spouse and their families.

6 Conclusion

During our analysis, several questions appeared which we would like to outline here. The *eta-hinin* are tied to the concept of impurity, which they were discriminated against for centuries. It is unclear, however, whether a socially marginal group existed in the past onto which the notion of *kegare* was applied, creating another level of danger embodied by the impurity. Or were the outcasts already considered impure, and did the religion only strengthen an already-existing belief? Was *kegare* connected with consuming meat applied equally to other social classes? Like origin, *Burakumin* history can be perceived as a narrative serving either the dominant society or as justification for the marginalization of the group itself while, at the same time, generating feelings of solidarity among the marginalized. These narratives help to construct a group identity, whether it is based on a real or imaginary past. What other narratives concerning the *Burakumin* exist, what are their functions, and who do they serve?

As we have discussed in the example of the *Burakumin*, the identity of a group or individual, is a complex yet fluid entity that is constructed by both inner identification and outer categorisation. It is a process of constant redefinition of who we are and what is our place in society and within our community. The related *eta-hinin* groups were imposed in part by a constrictive social order, by the idea of inescapable impurity used as a rationale for broader society's discriminatory attitudes. During the modernization of Japan, new political ideologies imported from the West gave the (now known as) *Burakumin* an opportunity for liberation. Against the initial unification efforts coming from the inside, however, the *Burakumin* have further differentiated, resulting in a highly diversified group of unclear definition. Studying the *Burakumin* as a group therefore means studying an internally diverse cluster of smaller communities of different regional develop-

⁴⁸ June A. Gordon, "Caste in Japan: The Burakumin," *Biography* 40, no. 1 (2007): 279.

ment, historical backgrounds, and individual conditions, similar to other minorities around the world of unclear origin, heterogeneous history and inner diversity.

To study *Burakumin* from the perspective of individual identity means to take into account various factors that play a part in the process of identity formation and change. Matsushita's typology of *Burakumin* identity is based on an individual's approach and the range of interaction with one's community and the majority society. In accordance with this, *Burakumin* identity ranges from constituting an essential part of the individual's identity and self-esteem to being marginal or of unclear importance. Matsushita's model can also be understood as the process of how the *Burakumin* identity forms itself in young *Burakumin* who often experience uncertainty, worry and confusion during adolescence and through interaction with people of both sides decide on a certain approach towards them. The experience of acceptance, refusal, discrimination, ignorance or understanding can tip the scales to either side and push a *Burakumin* toward either side. The local community, family and school environment also contribute to the process, but their influence is frequently ambiguous, providing support but also limiting a person and his or her possibilities. School can represent a challenging place for many *Burakumin* children, providing an opportunity to open themselves to non-*Burakumin* and widen their social horizons beyond the *buraku*, as well as strengthen their bond with the community and its members who share a common experience. Occupation and marriage may present a similar opportunity or threat.

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The Evaluation of Muslimophobia in Poland

Abstract | The perception of Muslims in contemporary Poland is generally negative, in spite of the fact that they constitute only about 0.1% of the Polish population. Muslim communities are frequently identified with Arabs or refugees and in broader sense as the Other – evil and dangerous. The perception of these groups has a long history in Europe and Poland, and has even spread lately. The aim of this paper is to present an analysis of the genesis of this phenomenon.

In the paper, the author will attempt to examine the past, present and future of Muslimophobia and also present an outlook for combating this phenomenon and its related phobias (Arabophobia/Islamophobia) including proposals for how to counteract them (especially in Poland). The analysis proposed is based on a field study of the Arab community in Poland,¹ but also includes an analysis of the public discourse and the historical background.

Keywords | Muslims – Muslimophobia – Islamophobia – Arabophobia – Europe – Poland

1 Introduction

Islamophobia was initially the intended focus of the article. When analysing the phenomenon, however, the author realised that this concept does not adequately describe the simultaneous fear of Islam and Muslims. The term Islamophobia reductively and unwarrantedly transfers the blame for the mistakes of some followers onto the entire faith. Thus, the author follows Fred Halliday's terminology and uses the term Muslimophobia (anti-Muslimism).² The concepts are not used as substitutes, however, but as entirely separate phenomena. Islamophobia is the general fear of the religion, its dogmas, values, and expansion, while Muslimophobia is the fear of people whose identifying feature is their Islamic faith. The affiliation might be declarative (one's own declaration) or imagined (based on appearance, clothing, place of origin) which, regarding the phenomenon of Muslimophobia, determines the stigmatising label and not—which should be emphasized—the degree of actual religiousness, thus transferring the burden of responsibility from the religion onto the behaviour of a person.

Religion cannot be blamed for the sins and deviations of the particular followers. Additionally, as Amin Maalouf shows, what is happening in the Arab world at the moment does not have its origin in the history of Islam. Contemporary movements are not a natural product of Muslim history, but of this age and its deviations, practices, tensions, and uncertainties. Ob-

¹ Both, one hundred representatives of the Arab Diaspora in Poland and Poles, were the subject of the research with the application of the triangulation method. The waves of Arab migration to Poland differ i.a., according to the date of arrival (those who arrived most recently can be considered a "New" Diaspora, whereas those who came before 1989 and stayed in Poland created the "Old" Diaspora). The research results are published in: Mustafa Switat, *Spolecznosc arabska w Polsce. Stara i nowa diaspora [The Arab Community in Poland. The Old and the New Diaspora]* (Warszawa: Dialog, 2017).

² Fred Halliday, "Islamophobia' reconsidered," *Ethnic and Racial Studies* 22, no. 5 (1999): 892–902.

servers of Muslim countries are in the bad habit of blaming Islam for everything, when many other factors have come into play. According to Maalouf, one may read ten tomes on the history of Islam from its very beginning and still not understand what has been recently happening in the Arab world. It is enough, however, to read thirty pages on colonization and decolonization, and everything becomes clear.³

2 Muslims Communities in Poland – the Current Situation

Muslims and Arabs (since many of the Polish respondents incorrectly believe that every Arab is a Muslim and that every Muslim is an Arab) are generally an unknown alien in Poland. Up until World War II, Tatars were the only Muslim community in Poland (they have been living here for over 600 years). In the period of the Polish People's Republic, some students from Muslim (mostly Arab) countries began to arrive, but due to their contemporary status and political situation they did not have considerable impact on Islam. The situation changed after the Polish transition of 1989 and currently Muslims are represented (in numbers): by former students and newcomers from Arab (and other Muslim) countries, Tatars, citizens of Asian or European countries (e.g., Turkey, Chechen Republic) and Polish converts. Islam is a religion in Poland officially recognized by the state. There are two main Muslim organizations: the Muslim League (ML)—established by Muslims of Arab origin in 2001 and registered in 2004, and the Muslim Religious Union that was created in December 1925 by Tatars (MRU). Both organizations have their mosques and prayer houses in major Polish cities. There are three mosques belonging to the MRU: in Gdańsk, Bohoniki and Kruszyńskie (those two last are generally only visited by Tatars), and ML has one, new mosque in Poland, in Warsaw, whose construction was the subject of many protests. All these buildings lately experienced acts of violence and many Muslims have suffered from hate crimes.⁴

The opinion polls showed that an overwhelming majority of respondents did not know any Muslims personally (78%) and claimed that the people close to them did not know any Muslims (64%). At the same time, the respondents have strong Islamo- and Muslimophobic attitudes. Moreover, they perceived Muslims as a realistic, symbolic, and terrorist threat, and they experienced an intergroup fear.⁵ Additionally, the negative image of a Muslim (and an Arab) became more profound and ubiquitous after 2015; they began to be associated with refugees from Muslim countries. As a result, the social unwillingness to accept refugees (or, synonymously, immigrants), a “suspect community,” increased dramatically; currently, Poles view Islam as a religion of hatred.⁶ To understand why Muslims and their faith are so negatively perceived one needs to go back to the rhetoric of the Middle Ages.

³ Amin Maalouf, *Zabójcze tożsamości [In the Name of Identity: Violence and the Need to Belong]* (Warszawa: PIW, 2002), 76–77.

⁴ See Mateusz Wąsik and Piotr Godzisz, *Hate Crime in Poland 2012–2016* (Warsaw: Lambda, 2016).

⁵ Anna Stefaniak, *Postrzeżanie muzułmanów w Polsce: Raport z badania sondażowego [The Perception of Muslims in Poland: Report from the Survey]* (Warszawa: Centrum Badań nad Uprzedzeniami, 2015), 22–26.

⁶ “Polacy o uchodźcach – w internecie i w realu,” *Komunikat z badań [The Poles on Refugees – on the Internet and in the Real World, Report from Research]* (Warszawa: CBOS, 2015), 10.

3 The Genesis of Muslimophobia (and Islamophobia)

According to Marek Dziekan, “we are afraid of Islam because it invokes a spirit that we have long lost” in the postmodern understanding of “freedom,” that is being free of any values, traditions or anything that goes beyond the basic “to have.”⁷ This statement pertains to contemporary Islamophobia. The origins of this phenomenon, however, have to be traced back to the Middle Ages. Fear of this religion has existed since the Medieval crusades when it was considered a threat to the Catholic church: both as a distortion of the Christian doctrines and because the Muslim expansion threatened Europe. Recently, the fear has been fuelled by the fear of terrorism. As a consequence, hostility towards Islam and Muslims has been growing.⁸

The term “Islamophobia” is mainly associated or aimed at Arab Muslims. In this strict sense, as a form of racism against one of the Semitic peoples, one may call it (in terms of the mechanism of similarities) a kind of anti-Semitism. A deeply rooted fear of others is at the core of Arabophobia. Poles perceive Arabs as physically and culturally alien, mainly because they seem different from Polish society: their appearance usually gives their foreign origin away (the phenotypic Otherness), and they are also visible ethnically.⁹ Their darker complexion is a giveaway as well as a reason for calling them black or dirty. The research conducted by the Arab diaspora has demonstrated that individuals with a darker complexion are exposed to racist attacks; this is a problem that also concerns other foreigners whose skin colour stands out in Poland.¹⁰ The classic dichotomy of “natives” versus “strangers” comes into play. When there is sporadic contact between Poles and Arabs, i.e., cultural contact, adaptational difficulties concur on both sides: the host society’s and the newcomers’. Alienation is at the core of the mutual attitudes. It is subjective, namely felt towards the Other, and reflective, which involves assigning a sense of alienation towards the subject.¹¹ Strangers are those with whom an individual does not have any social ties or those racially, culturally, or tribally different from an individual.¹²

Polarised views on dark-skinned people have manifested themselves at the very beginning of the development of European civilisation. In the era of slavery, only free individuals were considered human beings. Medieval Christianity was also a source of many stigmatising attitudes—the stereotype of a diabolic Negro has survived, in a modified form, to this day.¹³ Many thinkers propagated the racist worldview that there is an unchangeable pecking order of cultures in which Europeans take first place, before the people of Asia and Africa. It was the basis of Charles Darwin’s theory of evolution. Many of the greatest modern minds acquired a racist

⁷ Marek M. Dziekan, “Trzeba spojrzeć również w siebie” [It Needs to Have a Look at Oneself], *TEOFIL. Pismo Kolegium Filozoficzno-Teologicznego Dominikanów*, no. 24 (2006): 47.

⁸ Stephen Castles and Mark J. Miller, *Migracje we współczesnym świecie [The Age of Migration]* (Warszawa: Wydawnictwo Naukowe PWN, 2011), 322.

⁹ T. Modood, *Multikulturalizm [Multiculturalism. A Civic Idea]* (Poznań: Wydawnictwo Nauka i Innowacje, 2014), 18.

¹⁰ Mustafa Switat, *Społeczność arabska w Polsce. Stara i nowa diaspora [The Arab Community in Poland. The Old and the New Diaspora]* (Warszawa: Dialog, 2017), 437–447.

¹¹ Ewa Nowicka, *Blaski i cienie imigracji, Problemy cudzoziemców w Polsce [Blows and Shadows of immigration, Problems of Foreigners in Poland]* (Warszawa: WUW, 2011), 11–14.

¹² Zbigniew Benedyktowicz, *Portrety “obcego.” Od stereotypu do symbolu [Portraits of an “Alien.” From Stereotype to Symbol]* (Kraków: Wydawnictwa Uniwersytetu Jagiellońskiego, 2000), 39.

¹³ Michał Sobiecki, “Rasizm i antysemityzm a tożsamość kulturowa” [Racism and Anti-Semitism and Cultural Identity], in *Patriotyzm i nacjonalizm. Ku jakiej tożsamości kulturowej? [Patriotism and Nationalism. To which Cultural Identity?]*, ed. Jerzy Nikitorowicz (Kraków: Oficyna Wydawnicza Impuls, 2013), 66–67.

worldview as a consequence of Europeans coming into contact with “primitive” people during overseas expeditions,¹⁴ namely the Western expansion.

In the 1970s, Edward W. Said published *Orientalism* in which he declared that Orientalism was a product of European ideology and that it imposed a stereotypical perception of the Orient, especially of Islam (the source of Arabo- and Muslimophobia), which is still in existence. Said pointed out that “to some extent, the Orient was a European invention; since antiquity, the Orient has been a place of romance, exotic beings, haunting memories and landscapes, and remarkable experiences.”¹⁵ The world of Islam was the subject of many written untruths, and this false image was co-created by, e.g., writers, thinkers, travellers, and orientalists. As if to confirm Said’s arguments there are, for instance, Polish travellers’ accounts, including a nineteenth century Egyptologist, Józef Sękowski, who criticized orientalists for promoting lies about the Arab population, according to which they were wild peoples, while some of the nomadic tribes knew writing, books, literature, and art.¹⁶ At almost the same time, Waclaw Rzewuski wrote about the naturalness, freedom, and simplicity of the Arab life, one that is full of virtues and spontaneity, arguing that the colourful tales of debauchery in harems are only products of the European imagination.¹⁷

Hieronim Kaczmarek analysed thousands of documents and diaries of Polish travelers who visited the Arab lands since the twelfth century and claims that the image of this world and its inhabitants were presented as unreal.¹⁸ In spite of wide spread stereotypes of Arab-killers, Kaczmarek never came across any accounts concerning someone who had been a witness to the death of a foreigner, and some of the German examinations confirm it.¹⁹ The research conducted by the Arab diaspora also confirmed that it is a community whose reality is far from the stereotypes. The members of the Arab Diaspora (especially the Old Diaspora) who live in Poland are not that alien as they are perceived. In many cases, they share the Poles’ views on various aspects of living in Poland or the issues of migration, or the way they are perceived.²⁰ In today’s Poland, an Arab is more likely to be associated with a poor refugee or an employee at a kebab place than with a wealthy student from Saudi Arabia or a Polish citizen. Nevertheless, all of these roles are in the majority a dehumanising oversimplification. Stereotypes last long because there is a lack of personal Polish-Muslim contacts which can be caused by the small number of their communities: there are about 12 to 15,000 Arabs in Poland²¹ and about 25 to 40,000 Muslims. There is no reliable information and knowledge regarding the specificity of Muslim communities in Poland. There are no classes on the diversity of cultures or religions in Polish schools and the media reports only negative events concerning Muslims (outside Poland). The biggest problem is that Muslims are not treated individually and objectively—the entire Muslim (or Arab) community shoulders the (collective) responsibility (identity) for the reprehensible actions of individuals of Arab/Muslim descent.²² Additionally, an unfounded and exaggerated fear that has no basis

¹⁴ Paul Scheffer, *Druga ojczyzna. Imigranci w społeczeństwie otwartym [Immigrant Nations]* (Wołowiec: Wydawnictwo Czarne, 2010), 326–333.

¹⁵ Edward W. Said, *Orientalizm [Orientalism]* (Warszawa: PIW, 1991), 23.

¹⁶ Jan Reychman, *Podróżnicy polscy na Bliskim Wschodzie w XIX w. [Polish Travellers in the Middle East in the XIX Century]* (Warszawa: Wydawnictwo Wiedza Powszechna, 1972), 128.

¹⁷ *Ibid.*, 111.

¹⁸ See Hieronim Kaczmarek, *Polacy i Egipt na przestrzeni wieków. Zapiski, dzienniki, wspomnienia z podróży [Poles and Egypt Throughout History. Notes, Journals, Travel Memories]* (Warszawa: Dialog, 2018).

¹⁹ Cf. Anette Katzer, *Araber in deutschen Augen. Das Araberbild der Deutschen vom 16. bis zum 19. Jahrhundert* (Paderborn-München-Wien-Zürich: Ferdinand Schöningh, 2008).

²⁰ See Switat, *Spoleczność arabska w Polsce. Stara i nowa diaspora*.

²¹ *Ibid.*, 243.

²² *Ibid.*, 551, 681.

in the actual social situation and that probably comes from observing Western countries with a large number of immigrants and Muslims (including the migrant crisis) appears. This “moral panic” (negative, anti-immigrant and anti-Muslim discourse) known from the West is being often used in political elections.²³

Last but not least—the sources of Muslimophobia can be found in Polish history. Poland is a specific country where always some kind of duality appears—from one side a tendency to accept Others and from the other side—a resistance to them. In spite of episodes of repression and the tendency to forced assimilation which occurred in its history, religious tolerance in Poland was much higher than in Europe.²⁴ For instance, Sobieski’s celebrated Battle of Vienna has remained an important symbol in Poland. It is still a reason for national pride that a Polish king managed to stop the wave of Islam and save Christianity in this part of Europe. It is still believed, up until the present, that Poland is a bulwark of Christendom (“antemurale christianitatis”). The fact is that Sobieski, in a way, brought Muslims to Poland in 1679, for their military service, endowed them with an estate in Podlasie, including the famed Bohoniki and Kruszyńniany.²⁵

Since the eighteenth century, the Catholic confession began to be one of the most important criteria of Polishness and an important cultural element unifying Poles and helping them survive the long period of partitions and preserve Polish identity.²⁶ In the Polish People’s Republic, minority representatives were repressed and had to be publicly invisible. Communists were systematic in their fight for the atheisation and secularisation of public life, using different methods to combat, even the main religion of Poland, the Roman Catholic Church.²⁷ After the Second World War, denomination-wise, Poland became a largely homogeneous country. Currently, members of the Roman Catholic Church constitute about 94% of Poland’s population.²⁸

After 1989, an imitation transformation occurred in Poland.²⁹ Appropriating the negative anti-Muslim discourse is another form of imitating the West, one that bears no relation to Polish reality (the Arab-Muslim public rhetoric in Poland is, in a sense, the transference of the same narrative observed in Western countries).³⁰ Importantly, due to the recent migration crisis the issue of accepting immigrants (refugees) has been politicised. They are perceived as a threat to the national identity, values, culture, lifestyle, and social norms of the host society.³¹ They are

²³ Cf. Eleonora Garosi, “Moral Panic and Social Construction of Migrants as a Security Issue in the Context of Risk Societies” (conference paper, Transnational Mobility and Security: Conceptual Frames, Experiences and New Perspectives for the European Union, Cecina), July 12, 2002.

²⁴ See Janusz Tazbir, *Tradycje tolerancji religijnej w Polsce [Traditions of Religious Tolerance in Poland]* (Warszawa: Książka i Wiedza, 1980).

²⁵ Agata Skowron-Nalborczyk, “Kilka uwag o ignorancji” [A Few Remarks on Ignorance], *TEOFIL. Pismo Kolegium Filozoficzno-Teologicznego Dominikanów* 24 (2006): 53.

²⁶ See Janusz Tazbir, *Kultura szlachecka w Polsce [Noble Culture in Poland]* (Warszawa: Wiedza Powszechna, 1979).

²⁷ Jerzy Eisler, “Stosunki Kościoł-państwo w powojennej Polsce w najnowszych publikacjach” [*Church-State Relations in Post-war Poland in the Latest Publications*], *Pamięć i Sprawiedliwość*, no. 3/1 (2004): 387.

²⁸ Cf. *Wyznania religijne w Polsce 2012–2014 [Religious Confessions in Poland 2012–2014]* (Warszawa: GUS, 2016).

²⁹ Marek Ziółkowski, *Teoria socjologiczna a transformacja społeczeństwa polskiego [Sociological Theory and the Transformation of Polish Society]* (Warszawa: Scholar, 2015), 250.

³⁰ See i.e., Agata Marek, “Obraz Arabów i islamu w polskim społeczeństwie – elementy składowe stereotypu,” [The Image of Arabs and Islam in Polish society – Components of the Stereotype] in *Islam: Między stereotypami a rzeczywistością [Islam: Between Stereotypes and Reality]*, eds. Piotr Kłodkowski and Agata Marek (Warszawa: Stowarzyszenie Vox Humana, 2006).

³¹ Cf. Gary P. Freeman, *Incorporating Immigrants in Liberal Democracies* (Princeton University: The Centre for Migration and Development, 2003).

regarded as a threat to Christian identity, both in Poland and Europe, even though Islam has been present in Poland and Europe for many years. Even more importantly, there are European countries predominantly (Albania) or mainly (parts of Bosnia and Herzegovina or Serbia) inhabited by indigenous Muslims, which does not take into account the Muslim diaspora coming from countries outside of Europe. Therefore, opinions that the European identity is exclusively Christian ignore the contribution of other religions to the European cultural heritage.

4 The Outlook for Combating Muslimophobia and Related Phobias

Observing recent years of increasing Muslimophobia and related phobias, the future does not seem to be optimistic. Although, a number of persecutions of various minorities have occurred in the history of Europe,³² which also brought many negative consequences to the host countries, their situation has not changed all that much. Muslims are not the only minority experiencing the results of its negative perception, but the situation of Muslims lately seems the worst. The consequences of Muslimophobia can be not only individual, but concern society as a whole. They include: obstacles to integration with the host society (an immigrant will be reluctant to integrate with a hostile society); potential economic losses (because the image of a xenophobic country may drive tourists, international students or investors away) and the threat of Nazism coming back, this time to target Muslims.³³

There are several reasons for being pessimistic about combating those phobias. Firstly, Islamophobia is the manifestation of a bigger, global social problem in the contemporary world. This period of various crises (financial, economic, moral, migration- or refugee-related), characteristic of our times, impels the world to dehumanize people. The negative perception of Muslims (and Arabs) is in opposition to the peace in the Arabic world, as the general public is not interested in helping and supporting people or stopping the conflicts taking place there. Hearing about the victims does not make people feel for them; it only propels hate speech, because many are satisfied that “at least another bad Muslim and a terrorist got killed,” even when the victims are small and innocent children. In general, their lost lives are not lamented, because their deaths mean that there are fewer “bad” people. As an example, some Poles reacted in this fashion to a photo taken on a Turkish beach in Bodrum which depicted the body of a boy who drowned when crossing the Aegean Sea.³⁴

Secondly, it is hard to challenge stereotypes as they enjoy a long life, and the perception of Islam has not changed much since the Middle Ages.³⁵ The media, politicians and the public will probably never stop generalizing about Muslims (and Arabs) and discussing them as a threat. According to Stephen Castles and Mark J. Miller, racism will remain a problem for as long as politicians choose to build their electoral capital around anti-immigrant resentment. Persecution, violence or racist campaigns are factors that play a prominent role in the formation of ethnic minorities [in multicultural countries – M.S.] that tend to live in the same districts, foster their cultural traditions and maintain their languages. By isolating the minorities and forcing them

³² See Tazbir, *Tradycje tolerancji religijnej w Polsce*.

³³ Mustafa Switat, “Rasizm i mechanizmy mu pokrewne w kontekście badań nad diasporą arabską w Polsce” [Racism and Related Mechanisms in the Context of Research on the Arab Diaspora in Poland], *Studia Migracyjne – Przegląd Polonijny* 1 (2018): 189–218.

³⁴ As one online commenter wrote about the article “The photo of the dead child shook Europe. Only the father survived.” “I was not moved! On the contrary, one potential terrorist gone!!!,” accessed December 28, 2018, <http://wiadomosci.dziennik.pl/swiat/artykuly/499441,cialo-3-letniego-syryjczyka-na-plazy-w-bodrum-w-turcji.html>.

³⁵ Castles and Miller, *Migracje we współczesnym świecie*, 322.

to use defensive strategies, racism may induce self-organisation and separatism. It may even push them towards religious fundamentalism. Anti-racist actions may help break, however, the isolation of minorities and facilitate their socio-political integration.³⁶ Even if only part of society exhibits negative traits, the authorities should draw conclusions, prevent such incidents, and adopt measures for limiting the adverse social effects of racism.³⁷ This is not the case, and the problem of racism-driven attacks becomes marginalised.

There will always be interest groups that profit from the negative perception of Islam. The political world uses the imagined threat of Islam to attract a bigger electorate, while the media uses it to attract audiences since sensational (even if unreal) news about Islam and Muslims sell very well.³⁸ Generally, sensational news about crimes and violence sells very well, but the perpetrator's confession is made public only when it is a Muslim. Confessions (or country of origin or citizenship) of other offenders remain private (even when it was personal data before implementing the General Data Protection Regulation). By making the confession public, all Muslims are widely assumed to be dangerous and evil. While an entire religion should not be blamed for the sins of a single man, any pathological phenomenon perpetuates the negative image of Islam and Muslims/Arabs.

The problem of Islam is that the West did not acknowledge and accept it as a religion equal to other monotheistic religions. As of the Middle Ages, it has been considered a heresy.³⁹ Due to the media, the name of Allah has become more associated with attacks than with God. The Prophet has been repeatedly believed to be only the creator of this faith (hence the fallacious name of Mohammedanism/Mahometanism in many sources). He has often been disrespected as a Prophet, neither historically (considering, e.g., the works of Dante or Voltaire)⁴⁰ or at present (considering, e.g., the caricatures). While probably every Western constitution guarantees respect for religion, there is no respect for Muslim religious feelings. Muslims are asked to respect the local law of the host country, but the host country does not always guarantee their fundamental right to have their religion respected and their dignity protected. There are more examples of this double standard regarding matters of faith, e.g., a Muslim woman publicly wearing something different than other women is a visible problem.⁴¹ The world has quickly forgotten about the Crusades, and they have never been condemned. To this day, however, the Muslim conquests have remained the main reason behind the hatred of Islam and Muslims.⁴² Blaming contemporary Muslims for the past conquests involves making them responsible for their cultural, historical, and religious ancestry (collective responsibility).

Discussions regarding Islam are always centred on its differences from the other faiths and never on the similarities between the three monotheistic beliefs, coming from the same Creator,

³⁶ Ibid., 326.

³⁷ Sobiecki, *Rasizm i antysemityzm a tożsamość kulturowa*, 66.

³⁸ Agnieszka Rostkowska, "Nic nie czyta się tak dobrze jak antymuzułmańska sensacja" [Nothing is Read as Well as an Anti-Muslim Sensation], accessed December 28, 2018, http://wyborcza.pl/1,75478,16972144,_Nic_nie_czyta_sie_tak_dobrze_jak_antymuzulmanska.html#ixzz3j10UyQRE.

³⁹ Agata Marek, "Dlaczego boimy się islamu?" [Why Are We Afraid of Islam?], in *Imigranci w polskim społeczeństwie [Immigrants in Polish society]*, eds. Teresa Halik, Agnieszka Kosowicz, and Agata Marek (Warszawa: Stowarzyszenie Vox Humana, 2009), 76.

⁴⁰ In the *Divine Comedy* (1320), Dante Alighieri described Muhammad and his cousin Ali, suffering torment in hell, by Satan's side. In *Fanaticism, or Mahomet the Prophet* (1741), Voltaire accused Muslims of extremism, fanaticism and violence. See Daniel Norman, *Islam and the West: The Making of an Image* (Oxford: Oneworld, 1993).

⁴¹ Elżbieta Ciżewska-Martyńska, Maciej Jewdokimow, Mustafa Switat, and Bartłomiej Walczak, *Rynek pracy a równe traktowanie ze względu na wyznanie. Raport z badania [The Labor Market and Equal Treatment on the Basis of Religion. Test report]* (Warszawa: Biuro RPO, 2018).

⁴² Marek, *Dlaczego boimy się islamu?*, 76.

which could unite all followers. They have a great deal in common, including problems. Agata Nalborczyk, for example, claims that Christians should not be afraid of Islam—since they are devout, they should consider Islam an ally in their fight against the progressive secularisation of life in Europe.⁴³ The Church in Poland generally has positive relations with Islam of late, e.g., the Islamic Day in the Catholic Church is organized annually (always on January 26) since 2001.⁴⁴ Putting an end to Islamophobia should begin with a global acknowledgement that Islam is equal to other religions. As Eugeniusz Sakowicz claims, “the task of contemporary Catholics is the courageous proclamation of the truth about their ‘younger brothers’ in the faith of Abraham—the Muslims.”⁴⁵

5 Practical Solutions to Counteracting Muslimophobia and Related Phobias

To inhibit racism and its mechanisms, as well as to fight with the demonization of the Other (here: Muslim/Arab), measures should be taken to foster the coexistence of various groups that are Other from the native population. The most important measures are: increasing direct contacts with Others, educating reliably and objectively (including the media representatives), and shaping an objective image of the Others through correct information.⁴⁶ Intergroup contact is one of the best ways of eradicating prejudices. Research demonstrates that the attitudes of individuals who know representatives of other groups are more favourable.⁴⁷ In the author’s research, this process has been described as a theory of including the Other. Getting to know the Other shows that the other is not all that alien.⁴⁸

Therefore, first and foremost, individualization has to be introduced (a characteristic of post-modern societies)⁴⁹ with regards to the members of the Muslim/Arab community. Although their negative perception is, to some extent, a result of the actions of some of their representatives, collective responsibility is unwarranted. It is a biased overgeneralization that leads to categorization and discrimination. The division between the good and bad deeds (derived from religion) should be the fundamental principle behind distinguishing and evaluating human behaviour, regardless of the person’s origin or denomination. Instead of merely blaming Islam for their actions, there should be more studies that aim at investigating the personal reasons of the offenders in order to separate religion from the pathological acts not accepted by the absolute majority of Muslims.⁵⁰ Are the beliefs the reason behind these acts? Do the offenders believe that they are acting as their faith demands? Alternatively, is it, e.g., an expression of their frustration after being mistreated?⁵¹

⁴³ Skowron-Nalborczyk, *Kilka uwag o ignorancji*, 53.

⁴⁴ “Rada Wspólna Katolików i Muzułmanów” [Common Council of Catholics and Muslims], accessed December 30, 2018, <http://www.radawspolna.pl/>.

⁴⁵ Eugeniusz Sakowicz, “Kościół katolicki wobec islamu. Historia i współczesność” [The Catholic Church towards Islam. The History and Present Day], *Ateneum Kapłańskie*, no. 151, z. 1 (2008): 55.

⁴⁶ Switat, *Rasizm i mechanizmy mu pokrewne w kontekście badań nad diasporą arabską w Polsce*, 189–218.

⁴⁷ Stefaniak, *Postrzeganie muzułmanów w Polsce: Raport z badania sondażowego*, 6–7.

⁴⁸ Mustafa Switat, “An ‘Alien,’ or a Stranger Indeed?,” *Acta Universitatis Sapientiae, Social Analysis* 7 (2017): 41–58.

⁴⁹ See Zygmunt Bauman, *The Individualized Society* (Cambridge: Polity Press, 2001); Anthony Giddens, *Nowoczesność i tożsamość. “Ja” i społeczeństwo w epoce późnej nowoczesności* [Modernity and Self-identity: Self and Society in the Late Modern Age] (Warszawa: Wydawnictwo Naukowe PWN, 2001).

⁵⁰ See Agata Skowron-Nalborczyk, “Muzułmanie przeciw ISIS” [Muslims against ISIS], *Więź* 4 (2014).

⁵¹ E.g., in the context of the unrest in France, see Agata Skowron-Nalborczyk, *Kilka uwag o ignorancji*, 51.

Secondly, the key is to spread factual knowledge. Those who know will not be easily affected by the media, politicians or false experts who are prejudiced and often popular stereotypes—in- stead of factual knowledge—in their verbal or written communication. There is a need for more research into the Muslim communities, whose voice remains absent or ignored in the public debate; a debate currently held in the spirit of “about us without us.”

Generally, people (perhaps beginning with the media representatives) should learn to analyse the news and situations from different perspectives. Naturally, it is difficult to say whether Muslims are good when there has been another attack somewhere. However, before passing judgment and starting to generalise, there should be an awareness that Muslims are also threatened, and often fall victim to the very same attacks, for instance, Syrians escaping their fellow believers. The creators of the concept that Poland should only accept refugees of a given religion have not considered this—even though Christians were and remain the victims of this conflict. The suffering Muslims are considered unworthy of help, on a par with their Muslim tormentors, and have been left there to die. When it comes to war, the moral obligation—let alone the religious one—should not be about differentiating between those worthy and unworthy of help. Refugee aid has been somehow categorised based on the faith of the refugees.

6 Conclusion

In conclusion, the history of Muslimophobia and related phobias has its roots in Medieval Europe and global measures to counteract this phenomenon should be taken. Muslimophobia in Poland has a much shorter history and has lately begun to move in a risky direction. More positive interactions are needed to improve the situation. There is no need for special education regarding other religions, cultural festivals, etc. While they are a positive thing, they will not bring about any significant social change; the participants are people who are already interested, who already have some knowledge about Islam. It would be best if the Muslim subjects were personally included more in everyday life events, in regular Polish activities such as films, commercials, journals and scientific activities. They should be allowed to help organise celebrations of Polish feasts, celebrations or anniversaries. Moreover, at the same time, they should not just always play the role of an alien; they should play the role of an individual who has managed to integrate with the Poles in spite of another confession than the majority of Poles.

Calls for intercultural education in schools remain unanswered. There will in all probability not be any changes in the educational system. While education is required, a very basic thing suffices: that another human being should be respected and accepted just the way s/he was created. After all, respect and acceptance are values universal for any human and any religion.

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