



## Crossing Conceptual Boundaries X

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College of Professional Services

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Crossing Conceptual Boundaries  
ISSN 2041 - 9090

PhD Annual Yearbook New Series Volume X  
A peer-reviewed graduate publication,  
College of Professional Services, UEL, UK

Cover Image: 'Crossing borders – Athena's voyage of discovery' by Sharon Gallagher

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## *Developing 'Feminist Archival Sensibility' in a PhD ~~Literature Review~~*

Emma Jones

### *Abstract:*

This article explores the connections between ontology, epistemology and methodology in the literature review of a PhD in the social sciences. It asks whether and how early-career researchers develop literature review methodologies that are appropriate for the type of research project they intend. By juxtaposing systematic reviews with a more inductive method that integrates 'feminist archival sensibility' this article explores the implications of methodological choice for the wider philosophical framing of a thesis or dissertation. Although this article is intended for post-graduate students and early career researchers, supervisors may also be interested in the issues raised and the potential implications for doctoral pedagogy.

### *How do I begin a literature review?*

This is a question that every post-graduate researcher must answer when they begin their project. For researchers new to a field of study, it is a particularly pressing question. Without pre-existing knowledge of the empirical, philosophical or methodological literature, or an understanding of the typical literature review processes, the start of a postgraduate project can feel quite daunting. It is also full of possibilities. Undertaking a literature review imbues postgraduate researchers with knowledge about the field of research, and can, without conscious awareness, induct us into prevailing paradigms of knowledge (re)production (Oakley, 1999). As we read, attend seminars and supervision sessions, we are simultaneously learning about our chosen field and being shaped by its norms, values and cultures. Knowing about these paradigms before beginning a project has the potential to create spaces for reflection and experimentation.

Undertaking a literature review is a methodological process, yet it is rarely approached as one. Instead, a literature review is viewed as a first step, a-methodological or a process that leads to uncovering the tools that will be used in the empirical part of a dissertation or thesis (Cresswell & Cresswell, 2017). In the title of this article, the strike-through in the term '~~literature review~~' follows Heidegger's strategic philosophical device, 'sous rature'(1), which suggests a word or phrase is somehow inadequate, but cannot be completely disregarded. Its use in this article is to provoke readers to question their assumptions about the nature of a literature review and the extent to which it can or should be methodologically distinct from any empirical element. This article will juxtapose two methodological approaches to literature reviews that draw on different ontological

and epistemological foundations: systematic review and ‘feminist archival sensibility’. The aim is to provide post-graduate researchers with some methodological tools to orientate themselves at the start of their research project.

### *Ontology, Epistemology and Literature Reviews*

This article begins with a discussion of ontology and epistemology to trace how differences in our understanding of what reality ‘is’, and how we can come to know reality, affect the theoretical and methodological approach we might take to a literature review. Although research on the relationships between ontology, epistemology and methodology is not new, rarely is it discussed in relation to a literature review process. Failure to take an early interest in these philosophical foundations can cause a literature review to become methodologically adrift or bracketed from the rest of the research design, even though it is one of the foundational pillars of any project.

**Figure 1: Ontology, Epistemology and Paradigms in Social Science**

<b><u>Paradigm</u></b>	<b>Ontology (What is reality?)</b>	<b>Epistemology (How can I know reality?)</b>
<b>Positivism</b>	There is a single reality/truth that can be deduced	With reliable/valid research tools it is possible to know reality/truth
<b>Constructivism /Interpretivism</b>	Reality is created and sustained by individuals/groups. There is no single reality that can be deduced	At best, the knowledge of reality may be partial. Reality needs to be interpreted
<b>Relativism /Subjectivism</b>	Reality is what individuals/groups perceive it to be	All knowledge is a matter of perspective
<b>Critical Realism</b>	Reality exists independent of individuals/groups	Knowledge of reality is only ever partial and is shaped by ‘real’ but unobservable events.

(Adapted from Robson, 2011: 13-21)

Figure 1 provides an overview of frequently cited paradigms within the social sciences. Although presented as if there are clear ontological and epistemological differences between them, at times these differences do become blurred. For the purposes of this article, these differences will be used heuristically to support postgraduate researchers to better understand the implications for making methodological decisions.

There are numerous reasons for why different ontologies and epistemologies are deployed in social science research. This choice may be guided by the type of research questions asked, and as Ann Oakley (1999) points out, it is equally likely that a researcher’s assumptions or the fashions and expectations of a particular field, funder, or supervisor can also shape this decision. For a dissertation or thesis, it is important that the methods chosen are suitable for the research question(s) and underpinned by a consistent approach to ontology and epistemology throughout the research design. However, while books on research methods are likely to make distinctions about the suitability of methods connected to each paradigm it is often assumed that the literature review is separate from or outside of ontology.

With the lack of attention to literature reviews as a part of a methodological process, some common assumptions have prevailed. In ‘Real World Research’, one of the most highly cited books on social science research<sup>1</sup> a literature review is defined as a process of ‘systematically identifying, locating and analysing documents containing information related to the research problem [...] documents can include articles, abstracts, reviews, monographs, dissertations, books, other research reports and electronic media.’ (Robson, 2011: 51).

Robson also specifies five points that define the ‘purpose’ of a literature review:

1. *Exposes main gaps in knowledge and identifies principal areas of dispute and uncertainty.*
2. *Helps identify general patterns to findings from multiple examples of research in the same area.*
3. *Juxtaposes studies with apparent conflicting findings to help explore explanations for discrepancies.*
4. *Helps define your terminology or identify variations in definitions used by researchers or practitioners.*
5. *Helps to identify appropriate research methodologies and instruments (e.g. interview schedules, validated tests and scales).*

*Robson, 2011: 52*

Robson’s introduction to literature reviews positions it as a first step in a research process. He lists the appropriate documents that should be searched and provides a blue-print for the ground to be covered, typically involving periods of surveying and searching interspersed with moments of synthesis and analysis. By immersing oneself in the process of undertaking a literature review, an expectation is conveyed that a researcher becomes more familiar with the field, enough to identify ‘gaps’ and ‘patterns’ and ‘conflicting findings’ and make judgements about ‘appropriate methodologies and instruments’ (Robson, 2011: 52). Although other texts may have more inclusive lists of the type of documents that might be included, Robson’s book mirrors the general consensus when it comes to defining what a literature review is and the principles it should follow (e.g. Cohen et al, 2013; Neuman, 2013; Cresswell & Cresswell, 2017). When this general consensus is read with ontological and epistemological questions in mind an implicit assumption emerges that the reality of a problem can be deduced from a literature review, provided the right documents have been included and reviewed. In this one-size fits all approach to literature reviews, positivist assumptions about reality and theories of knowledge appear to prevail.

Much has been written about the paradigm wars of the 1980s (Gage, 1989) which saw interpretivist and subjectivist social science research challenge the post-enlightenment interest in ‘scientific’ knowledge. Although the validity and reliability of many qualitative approaches have since gained traction, the beliefs, values and techniques involved in methods of reviewing literature have, until recently, remained untouched. In recent years, the already positivist leaning of literature review techniques are becoming more rigidly defined and even codified. This is particularly evident in the growing use of systematic literature review methods, originally used to establish the efficacy of medical interventions, and now gaining attention in education, international development and other areas of social research (Higgins & Green, 2005). Systematic reviews certainly have their uses, and while they may be appropriate for aggregating quantitative data from randomised control trials they are not compatible with all research questions and research designs.

<sup>1</sup> This book is now in its 4<sup>th</sup> edition and according to Google Scholar has been cited nearly 20,000 times.

The remainder of this article has two aims. The first is to examine the ontological and epistemological assumptions implicit in systematic literature review processes and to question the implications of applying systematic techniques to research that is otherwise aligned with constructivist and subjectivist paradigms. The main body of this paper will then work with the concept of ‘feminist archival sensibility’, initially designed as a research method in archival research, to develop an alternative methodological approach when reviewing literature.

### *Systematic Literature Reviews in the Social Sciences*

Originally established to assess the effectiveness and efficiency of evidence in healthcare, systematic literature reviews have increasingly been used in education and wider social policy research over the last twenty years. They became more embedded in the social sciences as a result of work conducted by Ann Oakley and colleagues at the Social Science Research Unit (SSRU) in the 1990s, whose mission was to develop evidence-informed public policy in the social sciences (Oliver, et al. 2005). Writing about their growth in international development, Mallett et al. (2012) have put their rise in use down to growing pressures for accountability from donors and identifying ‘what works’ rather than what might be interesting or simply not known. They also point to shifting ideas about what represents ‘value for money’ when it comes to cost-effectiveness and ‘evidence-informed policymaking’ (p.445). Whether this is a response to the increased focus on research ‘impact’, the marketization of data or the sheer volume of knowledge output remains unclear, yet seeking robust evidence to support global, national and local policy decisions is not new. However, surges in the popularity of systematic reviews have seen the boundaries on their intended use increasingly pushed. Perhaps most contentious has been the application of systematic review methods to qualitative data derived from different methods, contexts and theoretical frameworks (Lipsey and Wilson, 2001; Cooper, et al. 2009). This has led to some confusion and heated debate about the limits of this type of approach to literature review in the social sciences. The following section of this article unpicks the key tenants of systematic reviews to understand when and how they might be usefully employed by postgraduate researchers. It also questions the ontological and epistemological borders of this methodology.

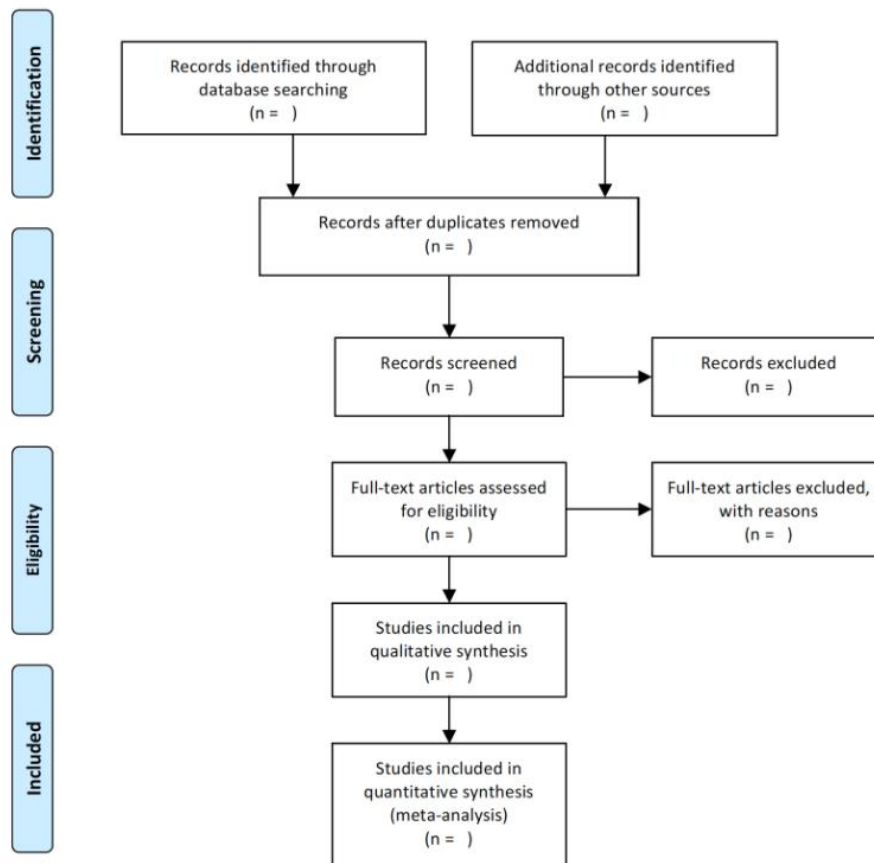
Systematic literature reviews are characterised as being objective, logical, transparent and replicable (Gough, et al. 2017). According to the Cochrane Review[2], their purpose is to ‘identify, appraise and synthesise *all* the empirical evidence that meets pre-specified eligibility criteria to answer a given research question’ (Cochrane, 2017: 1.2.1, emphasis added). This marks an interesting conceptual move in systematic review methodology, whereby the available literature becomes a dataset in its own right and the primary object of enquiry. The deductive methodological approach to a systematic review, commonly referred to as a protocol, serves as a roadmap that specifies the objects, methods and analytical framework of the review. Guidelines, an extensive checklist and a linear flow diagram (Figure 2) contained within the ‘Preferred Reporting Items for Systematic Reviews and Meta-Analyses’ (PRISMA) statement support researchers to critically assess any potential field of study. Typically, this begins with formulating a research question and checking Cochrane Database of Systematic Reviews (CDSR) and the Campbell Library to make sure that a review on this topic does not already exist.

Identifying an appropriate research question before a systematic review begins can be a particular challenge for postgraduate researchers since this requires substantial a priori knowledge. However, once the originality of the question has been established the deductive nature of the methodology

defines the series of steps that the researcher should take. One of the first steps is to identify appropriate search terms and key words associated with the topic, and academic databases where knowledge about the topic is likely to be stored. Gough et al., (2017) recommend that this part of the process can involve the help of a specialist subject librarian who may also help develop a Boolean search strategy across a range of databases. Each database search combines different words and phrases to identify studies relevant to the research question and the results of each search are recorded. Due to the amount of potential literature, searches are usually confined to titles and abstracts, the assumption being that researchers will write titles and abstracts that accurately reflect the content of their full text article.

In keeping with realist ontology, the researcher in a systematic review is instrumentalised and believed capable of making objective decisions. For example, they are expected to formulate a list of unbiased inclusion/exclusion criteria based upon the topic, definitions of key concepts, variables, research design, number of participants in a study and time frame (Gough et al. 2017). The researcher must then screen the identified articles against the pre-determined inclusion/exclusion criteria and critically assess them for quality, sometimes termed ‘risk of bias’.

**Figure 2: PRISMA Flow Diagram**



(PRISMA, 2009)

Once eligible studies have been identified, PRISMA provide guidelines on how to synthesise articles using meta-analysis and how write the review of literature. To this end, systematic reviews acknowledge and make transparent the different methods required for searching vs writing in a literature review.

Although originally concerned with the meta-analysis of quantitative empirical evidence, more recently researchers have begun to attempt systematic reviews of qualitative studies. While the challenges of synthesising quantitative data using meta-analysis have been written about extensively (Lipsey and Wilson, 2001; Cooper, et al. 2009), less is known about the ontological and epistemological dilemmas of qualitative synthesis (Britten, 2002).

The methods of quantitative meta-analysis cannot be directly transferred to qualitative research for both pragmatic and epistemological reasons. Unlike systematic reviews of quantitative research that use statistical meta-analysis to synthesise results, those attempting qualitative reviews must develop alternative methods of searching, synthesis and data presentation. Noblit and Hare (1988) sought to address this concern by developing a new qualitative form of systematic review, which they called 'meta-ethnography'. Meta-ethnography defines the field of study as the body of academic literature on any given topic and instead of the data coming from observations, interviews or other ethnographic methods; it is derived from the available qualitative studies. Noblit and Hare (1988) define seven steps in a meta-ethnography: 'Getting Started', 'Deciding Relevance', 'Reading the Studies', 'Determining Relationships', 'Translation', 'Synthesising Translations', and 'Expressing Synthesis'. Their aim was to systematise a method that would go beyond a narrative literature review and include a degree of conceptual innovation based on published findings rather than primary data (Britten et al., 2002). Unlike the case survey method proposed by Yin (2011) or Denzin's multiple exemplar approach (2001), meta-ethnography was intended to mirror the ontological framing of the studies it aims to synthesise. It does this by treating the original interpretations and explanations by researchers in the primary studies as data in the meta-ethnography. Synthesis is broken down into 'reciprocal synthesis' whereby data is directly comparable, 'refutational synthesis' in which data may be oppositional, or taken together to form 'line of argument'. While the transparency around different forms of synthesis is useful heuristically, the emphasis on the synthesis of results excludes the contextual significance, subjectivity and relativism of the original data.

Mallett, et al. (2012) articulate a belief that 'adhering to core systematic review principles - rigor, transparency and replicability - can improve the quality and strength of more traditional literature reviews' (p.447). They point to the potential for systematic reviews to expose researchers to research they might not already be familiar with and in doing so they can disrupt the researcher's bias and citation practices that privilege more frequently cited studies over others. Furthermore, Gough and Elbourne (2002) suggest that they draw attention to how research is done, rather than just the results and point to the importance of methodological transparency.

The difference between a systematic literature review and a more traditional narrative literature review is the use of an explicit methodology. The literature in a systematic review becomes both the object and the subject of a study; however, while this methodology provides transparency and guidance on both the process and the production of a literature review, it is restrictive in its ontological and epistemological framing. Perhaps most limiting is what is assumed to be valid knowledge worthy of synthesising and the lack of attention to the role of the researcher in the production of that knowledge. Even with the inclusion of so-called 'grey literature' in systematic

reviews, what makes these articles ‘grey’ is that they are not found in academic databases, usually because they have been commissioned by an external funding body (e.g. The World Bank) or government department (e.g. Department for International Development). The next section of this paper examines an alternative methodological approach to searching and writing that works with the more nebulous concept of ‘the archive’ rather than a knowable and fully searchable body of published academic literature. It implicates the researcher in the co-construction of the literature review, both as a process and a summative expression, and introduces potential avenues for including material and affective dimensions of social science research.

#### *Archivist’s Note:*

*Prior to beginning my PhD, I worked as a research officer on three systematic reviews of international education policy. I witnessed first-hand the frustrations of working with this methodology, particularly when it came to the analysis of quality studies and synthesis of qualitative research. As an early career researcher, I also found a degree of comfort in the systematising of the literature review process and the seemingly black and white inclusion/exclusion criteria. I would later find that designing search strategies for systematic reviews would provide me with a valuable skill-set to take into my PhD. For instance, I learnt which databases were most useful, about the importance of key words, how to design complex Boolean searches and useful hints and tips for organising potentially relevant literature. When it came to undertake a literature review for my own PhD, I began by using this systematic approach.*

*Approximately 6 months into my research, I attended a global international development conference. At this four-day conference there was an exhibition arena where hundreds of international non-governmental organisations, private sector companies and governments had set up stalls to promote their projects. On my way back from the conference, I had a suitcase full of leaflets, policy documents, advertising pamphlets and all manner of other documents that seemed useful for my research. On the one hand, it was clear to me that these documents would all be useful for my literature review and on the other hand I began to wonder if instead I should treat the conference as a site of data collection. The line between literature review and data collection had become blurred.*

#### *Developing ‘Feminist Archival Sensibility’ in a PhD ~~Literature Review~~*

In their book *The Archive Project: Archival Research in the Social Sciences*, Niamh Moore, Andrea Salter, Liz Stanley and Maria Tamboukou develop ‘feminist archival sensibility’ as a methodological approach to archival research in the social sciences. This section of the paper examines the possibilities for applying this fresh approach to a PhD ~~literature review~~. It specifically asks what ‘feminist archival sensibility’ might mean for the way we conceptualise ‘the archive’, appropriate literature, where we might find it, the role of the researcher, how a literature review should be undertaken, how to write a literature review and its relationship to the rest of a thesis?

In everyday parlance, distinctions are made between definitions of a repository, a library and an archive. Typically, libraries and archives are both types of repositories where records, data or artefacts are stored digitally and/or materially but differ in the types of record they hold and their use. On the one hand, a library is defined as repository that is intended for public use, allowing items to be borrowed and temporarily removed by a service user. A library also tends to collect and make accessible published material that is available in more than one place. In contrast, an archive traditionally deals with primary records, rare published materials and unpublished



documents. Subsequently there may be little or no general circulation of archival materials and their access is more strictly monitored.

Like the definitions offered above, Moore et al. (2017) explain that ‘feminist archival sensibility’ remains grounded in the notion that ‘an archive is a repository of some kind’ (2017: 1). Although the authors invite us to challenge the idea that there is a ‘property or characteristic inherent in some kinds of materials’ that make them worthy of being included in an archive (2017: 19), the exemplar archives cited throughout their book tend to be traditionally historical ‘community archives’ (2017: 171). Therefore, even though we are invited to think about how different media (videos, images and styles of text) can and should be part of an archive, there is little empirical evidence in this volume to disrupt the idea of an archive as comprised of purely primary and/or unpublished materials. That said, Moore et al. (2017) do provide the conceptual tools to make this disruption possible, and it is to them that this article now turns.

In ‘feminist archival sensibility’ the archive exists as a material place that contains a collection of artefacts, however, it is neither a fixed entity or entirely knowable. Instead, Moore et al. (2017) describe how our knowledge of the archive is simultaneously real and partial and the result of an always changing assemblage of discourses, bodies, artefacts and relationships. Such a conceptual move requires a shift away from purely positivist ontological and epistemological foundations, yet does not do away with them entirely. In addition, ‘feminist archive sensibility’ does not turn exclusively towards relativistic approaches. Instead, Moore et al., (2017) draw on Karen Barad’s neologism ‘ethico-onto-epistem-ology’, which points to the inseparability of ontology and epistemology in the practices of knowledge production. Barad argues that the production of knowledge is a constant intra-action between human (e.g. the researcher, the archivist, the author) and non-human phenomena (the text, the artefact, the building) and is coupled with an ‘ethics of entanglement’ (2011: 150) which reveals a political imperative that we, as early career researchers, cannot ignore. For Barad, and ‘feminist archival sensibility’, if we acknowledge that we are a part of the world then we cannot claim to be innocent bystanders or freely capable of observing it:

Knowing is a distributed practice that includes the larger material arrangement. To the extent that humans participate in scientific or other practices of knowing, they do so as part of the larger material configuration of the world and its ongoing open-ended articulation.” [...] “Knowing is a direct material engagement, a practice of intra-acting with the world as part of the world in its dynamic material configuring, its ongoing articulation. The entangled practices of knowing and being are material practices.

(Barad, 2007: 379)

For the purpose of this article, therefore, we might imagine the archive as an assemblage of human and non-human inter-actions that we and our research projects are always already a part of, even before we begin a literature review. In her article on space/time/matter in archival research, Tamboukou (2014) describes these inter-actions as ‘the entanglements of meaning and matter’ between the researcher, the documents and artefacts, and wider assemblage of economic, social and political processes. For postgraduate students who are starting a literature review, ‘feminist archival sensibility’ requires us to take stock of what we already know and how we have come to know it and the ethics of what we seek to create. What if a postgraduate thesis or dissertation was conceptualised as an archival project?

### *Defining and Locating ‘Appropriate’ Literature*

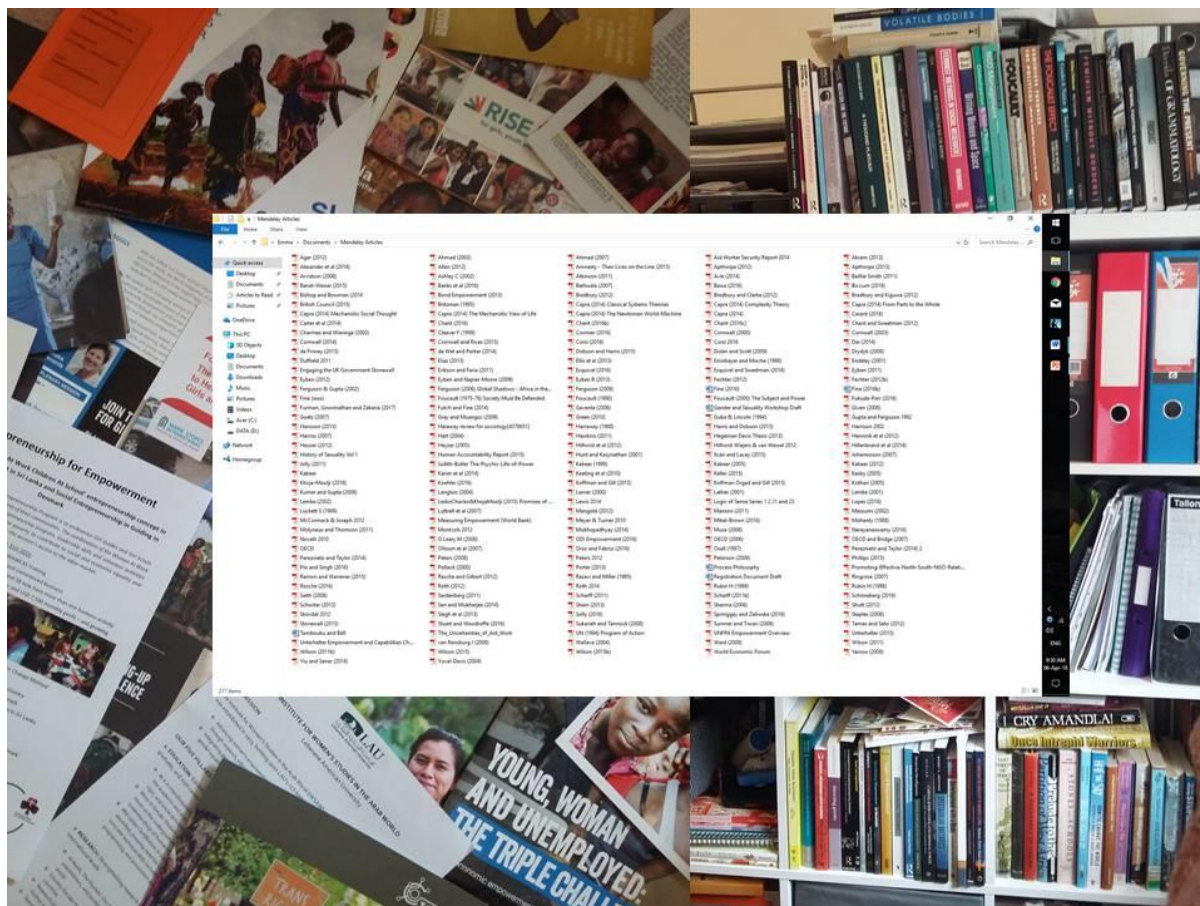
Systematic reviews set pre-determined limits to what counts as acceptable literature, where literature is likely to be found and how it should be interpreted. They also provide clear expositions on what to do, when, and how. Feminist archival sensibility does not deny the usefulness of developing strategic approaches so that a researcher may identify gaps and discontinuities; however, it does reject the possibility that a complete collection of literature on any given topic exists within an academic archive. Furthermore, while an academic archive may exist in a building or online, the boundaries between the academic archive and the wider world are porous. This porosity comes about because the writer, the archivist and the researcher all exist outside of the archive and are influenced by the wider assemblage of economic, social and political processes. If we decide to take these entanglements seriously when undertaking a literature review and reject the notion of an archive that is materially or discursively bounded, then we must understand that the archive of our research is something that comes into being as a dynamic and open-ended articulation.

From this perspective, decisions by researchers, archivists and others ‘establish the possibility of what can be said’ (Foucault, 1972/1980: 12), ‘the order of things’ (Foucault, 1970/2001) and subsequently what can be known, and we are reminded that research and the wider archive of material on a topic is not written, archived or read in a vacuum. When it comes to the information and data that exist within the academic archive, feminist archival sensibility suggests that we may only see fragments or ‘traces’ of knowledge rather than a full representation of reality itself. Steedman eloquently captured this sentiment when she said, ‘You find nothing in the archive but stories caught half way through’ (2001: 45).

In this alternative ethico-onto-epistem-ology of the archive, there exists an invitation to extend our ~~literature reviews~~ beyond the academic archive and to include a range of texts, media and interlocutors that are part of a wider dispositive<sup>[3]</sup> (Foucault, 1972/1980: 194-228). Subsequently, feminist archival sensibility requires a rejection of a ‘bibliographic approach to archival matters’ in favour of a more genealogical approach which aims to pinpoint interconnections and processes of production (Moore et al. 2017: 19). Therefore, feminist archival sensibility collapses the boundaries between reviewing literature and writing a literature review and implies a significant role for the researcher.

*Archivist’s Note:*

*Figure 3: Literature review or archive? A combination of three images of my PhD archive*



## *The Sensibility of the Researcher as Ethnographer*

Ethnographic methods and perspectives have been used across the range of ontological and epistemological traditions in the social sciences. For instance, meta-ethnography, employed in qualitative systematic reviews strongly echoes the classical tradition of social anthropology. Grounded in positivist ontology, meta-ethnography provides an objective study of the available literature whereby the researcher/ethnographer is omniscient and is interested in producing a detailed and accurate report on the studies in question using closely edited quotations. Importantly, the researcher is solely responsible for the accurate interpretation of the available literature and is unencumbered from any predispositions or exterior forces. Poststructural ethnography, on the other hand, challenges the authority implied in social anthropologic inquiries described above. According to Britzman (1995: 230), poststructural ethnography specifically contests the authority of empiricism, the authority of language, and the authority of reading or understanding.

In feminist archival sensibility, the researcher straddles the ethico-onto-epistemological position and grapples with the teleology of 'the real'. Researchers are part critical feminist ethnographers, taking steps to address material and discursive power relations in the archive while also working between the margins of claims to truth and claims to textuality (Delany, 1991: 28). Tamboukou (2017) is clear that sticking with this struggle of 'the real' vs 'the subjective' is important and that we should resist the temptation to nihilism. She argues instead, 'it is the traces and what can be understood from [the researcher's entanglements in the archive] that archival research should be

about if it is to have value as a methodological approach' (p. 174). Moore et al., (2017: 171) consequently draw attention to the 'blurry line [...] involving the collector/ archivist/ researcher/ writer/ reader'.

*Archivist's Note:*

*I think I became interested in the PhD as an archival project via ethnography. Near to the beginning of my PhD, I had a conversation with a friend and colleague about my project and what I thought I hoped to achieve. After about 10 minutes, she stopped me and said, 'it sounds like you are planning an ethnography of a concept'. There was something that rang true in her statement and I subsequently began to think about what this idea would mean for defining a field of study, the boundaries of the field and my role as an ethnographer. At this point, I hadn't been able to overcome my own assumptions about the separation between academic literature and empirical research, but as I carried out a genealogical exploration of my concept, I was beginning to find more and more cross-over between academics, policy-makers and practice. In the end, it became impossible to think of academics and academic literature existing outside of my field of study or having some god-like overview of the field – aware of, but separate from it.*

We might imagine, therefore, a postgraduate researcher entangled with/in the archive of their thesis. In researching and writing a thesis, the researcher is invited to uncover and engage with the 'ethics of [their] entanglement' (Barad, 2011, p. 150) at every stage. Key to engaging with this ethics is the notion of 'sensibility'. Therefore, feminist archival *sensibility* encourages us to make 'visible and audible – the sight and noise of working in the archive' and take note of how we respond to emotional and aesthetic encounters in 'the black box' (Stanley, 2017: 66).

As researchers undertaking post-graduate qualifications within institutional settings, we cannot claim to be neutral and objective figures given that we have a vested interest in the positive outcome of our research. We might therefore consider making 'visible and audible' the institutional restrictions, norms and values that work with and against us to create the conditions of possibility for our research project (Moore et al, 2017: 160). Funding, research training, fieldwork bursaries, supervisors and colleagues, library access, and departmental histories all influence our research sensibility.

*Writing a ~~Literature Review~~*

In Discipline and Punish, Foucault (1977/1995) describes power as diffuse and acting through people and institutions. He demonstrates this argument by analysing the ways that the human sciences produce and sustain certain forms of knowledge as acceptable, while marking others as dangerous or illegitimate. Subsequently, what becomes known as acceptable knowledge is the product of disciplinary practices which Foucault named, 'power/knowledge'. The archive of available literature is riven with power/knowledge relations and formations that implicate the researcher as archivist/activist and require us to adopt a critical approach to both researching and (re)writing our own research archive.

*Archivist's Note:*

*I found recognising my PhD as an archival project to be liberating and generative move. Becoming an archivist allowed me to see my role as a researcher as a political position; it provided a critical perspective on the decisions I was making about the texts and artefacts to include/exclude, cataloguing them and re-writing/ citing them in my own academic text. It also provided the tools to make these decisions explicit whereby conducting a literature review became a methodological and ethical process.*

Liz Stanley takes up this critical approach by encouraging researchers to be explicit about what happens ‘inside the back box’ of the archive (2017: 33-67) and include details of the activities that are rarely spoken or written about. For instance, this may provoke researchers to reconsider material and discursive conventions, such as the reproduction of so-called canonical texts in a literature review and encourage us to think carefully about the effects of our own citation practices. In her book, ‘Why Stories Matter’, Claire Hemmings examines the stories that feminist scholars have told about the past (2011). She argues that, “feminist theorists need to pay attention to the amenability of our own stories, narrative constructs, and grammatical forms to discursive uses of gender and feminism we might otherwise wish to disentangle ourselves from if history is not simply to repeat itself” (Hemmings, 2011: 2). The answer, according to Hemmings does not lie in ‘corrective’ storytelling and trying to bring forth what has been left out of the archive, but to bring into question the very politics and reasoning that ‘sustain one version of history as more true than another, despite the fact that we know that history is more complicated than the stories we tell about it’ (Hemmings, 2011: 15-16). Hemmings offers an alternative practice of citation, ‘re-citation’, whereby a text is read via a text that cites it, which she exercises by offering a re-reading of Monique Wittig via Judith Butler’s *Gender Trouble*.

Once we ground the entirety of a thesis ontologically, we must ask, to what extent is a ~~literature review~~ epistemologically separate from data collection? As this paper has demonstrated so far, both systematic reviews and feminist archival sensibility treat the literature in a ~~literature review~~ as data which require a methodological approach. When we write a thesis or dissertation, we write the archive of our research.

## *Conclusion*

My point is not that everything is bad, but that everything is dangerous, which is not exactly the same as bad. If everything is dangerous, then we always have something to do. So my position leads not to apathy but to a hyper- and pessimistic activism. I think that the ethico-political choice we have to make every day is to determine, which is the main danger

Foucault, (1984: 343)

Irrespective of the ontological and epistemological paradigm, this article has challenged the idea that we can effectively, and in good conscience, undertake a literature review without first developing an awareness of methodological approaches. The aim was to support early career researchers to think critically about the methodological choices we make before embarking on a literature review and what these choices may mean for the overall conceptual framing of a thesis or dissertation. Systematic reviews provide clear and coherent strategies for beginning a review, selecting appropriate literature and synthesising it to identify what works as well as gaps in our knowledge. However, they fail to address the role of the researcher, the effect of social, political and economic processes that have shaped the literature in question and can only be used to answer deductive research questions. Their attachment to quantitative and qualitative meta-analytical techniques gives an insight into the importance of transparency when synthesising literature and attempts to account for the role of the researcher by mitigating bias. Even though bias may suggest

that a researcher has the potential to negatively interfere with a research process, it also assumes that the research process and body of knowledge is otherwise unaffected by external factors.

By juxtaposing systematic reviews with an exploration of feminist archival sensibility, this article has tried to reimagine a PhD literature review. Feminist archival sensibility enables a more inductive approach to undertaking a literature review which requires the researcher to move between the realities of different documents and artefacts, the wider assemblage of economic, social and political processes while retaining an awareness of our own entanglements. It does this by conceiving of a postgraduate thesis or dissertation as an archival project where we are both archivists and researchers. In a research project, we decide on our collection of artefacts, how they are catalogued and where they are stored. Although we are constrained by what is available to us, we have agency to look beyond the conventions of institutional academic literature and practices. We also enter into our archive as researchers to analyse, synthesise and re-narrate. That is not to say that we are entirely free agents as either archivists or researchers. One way we can navigate our dual roles is to cultivate feminist archival sensibility, to ensure that we do not fall for what Haraway describes as, 'a god trick' (1988: 581) and allow ourselves to believe that we can see everywhere from nowhere. Feminist archival sensibility combines ethics and methodology to plant way markers for when we enter the archive so that we remember there may not be a single right or wrong way to go about a research project, but that each decision we make is potentially 'dangerous' and contains traces of possibility.

### Notes

1. Unlike Derrida's use of the concept which marks the absence of a presence, Heidegger uses 'sous rature' or under erasure to demonstrate an inarticulable presence.
2. Cochrane Review is a global independent network of researchers responsible for upholding the quality of systematic reviews in healthcare and related areas.
3. Foucault describes a *dispositif* as 'A thoroughly heterogeneous ensemble consisting of discourses, institutions, architectural forms, regulatory decisions, laws, administrative measures, scientific statements, philosophical, moral and philanthropic propositions—in short, the said as much as the unsaid.'

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# *Exploring the Possibilities for “Other” Politics in the Context of Asylum Activism in the United Kingdom and Germany.*

Isabel Meier

## *Abstract*

Based on my fieldwork in asylum activist spaces in the United Kingdom and Germany, I want to explore the possibilities of "other" politics in the context of asylum activism. In this paper, I situate the politics of asylum activism by bringing together three emergent bodies of scholarship - literature on everyday activism, the politics of affect and emotion, precarity and the asylum. I want to illustrate how looking at their entanglements in the context of asylum activism allows a more textured and contextualised analysis of what I call the "politics" of asylum activism. The results reveal the necessity to look at asylum activist spaces as spaces in which different social locations and experiences meet and to pay attention to the emotional and affective doings of these different positionalities if we hope to recreate activism as a space of care that all bodies can inhabit, especially marginalised bodies of asylum seekers. Rather than a critique of contemporary asylum activism, this paper hopes to provide possibilities for reorientation.

This paper comes out of a three-year intimate ethnography (Lerum, 2001; Waterston & Rylko-Bauer, 2007; Banerji & Distant, 2009) exploring the politics of asylum activism by attending to the everyday, affect and asylum seekers bordered positionalities. My intimate ethnographic approach to research allowed me to respond to conversations, feelings, and thoughts I encountered "in the field". It is not a practice that I read and then consciously applied. Rather, it is a form of relating, an "intimate knowing" (Lerum, 2001), that unexpectedly opened up through my friendships with asylum seekers. These relationships and the momentary collapsing of distance between us opened up an atmosphere of trust and understanding that made this intimate ethnography possible. Feelings and emotions shaped my research significantly. It was this immersion-based approach that allowed me to not only experience asylum activism in the United Kingdom and Germany at group meetings and events but to look and feel beyond the distinction between "public" and "private", into entanglements of the political, the everyday and the affective.

Here I want to explore the possibilities for "other" politics in the context of my activist involvement in asylum activist communities in London and Berlin. Interested in social change, I went into spaces where people from different backgrounds were trying to challenge existing power structures impacting on asylum seekers everyday lives. These asylum activist spaces were built to support people in the asylum, and yet, all 40 asylum seekers I became friends with over the last three years, kept questioning what was "offered" as a space of asylum activism. My conversations with them taught me to contemplate the questions: What is political space? Who gets to decide where and what political space is? Who is an agent within these spaces and who is not? Attending to these questions allowed me to listen to "other" politics and understand that moments of agency of bordered subjects cannot be captured by the framework of political theory as we know it.

### *Methodology*

I draw on memory, observation, 100 pages of field notes and recorded bits of conversation with 40 asylum seekers during my fieldwork in and around different spaces of asylum activism in London and Berlin between 2015-2018. Initial contact was made through my involvement with London's and Berlin's activist network. Conversations with asylum seeker activists before, during and after meetings were the starting point of this exploratory research. A few months later, in January 2016, I become friends with around 10 asylum seekers in London and one year later, in May 2017, with 7 asylum seekers in Berlin. These friends then introduced me to friends and acquaintances interested in joining our ongoing conversation about the politics of asylum activism. I conducted 40 interviews varying between 20 minutes and 3 hours over a time span of 18 months. During my fieldwork in an average week, I attended 2-3 meetings, different events organised by asylum activist groups or informal social gatherings with friends. I used Maxqda software to transcribe, organise and analyse my data gathered from observations, field notes, and recorded conversations. My conversations with asylum seekers usually started with a sharing about how we experienced our asylum activist involvement. About 24 of the 40 asylum seekers were attending formal activist group spaces regularly, while about 16 of the asylum seekers I spoke to retreated from the "visible" and well-connected asylum activist network. On average the asylum seekers I have interviewed spent 15-30 hours per week going to events, group meetings or gather with friends to discuss, share and support their challenges.

While in most groups the vast majority of the activists were white and European, I attended some groups in London that had a majority of asylum seekers from African countries. However, despite this majority, most often meetings and events were held and organised by a white minority. About 20 of the asylum seekers identified as women and 20 as men. Most asylum seekers I become close friends with were in their mid-thirties. However, I also interviewed asylum seekers in their twenties, forties, and fifties. Most groups I worked with made up of a high percentage of asylum seekers from African and South-Asian countries. My interviewees came to the UK and Germany for very different reasons; 16 asylum seekers came because of LGBT reasons. Sexual identity forces people disproportionately into the asylum system, particularly from African and South-Asian countries, where identifying as LGBT is illegal.

I use the term "asylum activism" to emphasise that all asylum seekers who have co-produced this research (1) did rely on activism and/or social relationships to support their asylum claim; (2) engaged (at some point) in multiple activist group activities, all organising around asylum issues; (3) were constraint and controlled by many practices, as for example money collecting and

reporting to the Home Office, uniquely tied to the asylum process; (4) have to negotiate precariousness in their everyday lives on a daily basis due to their housing situation, financial problems, stress and uncertainty, and (5) experienced everyday racism due to the markedness of their radicalised bodies. Even though I do not extensively engage with literature on race in this paper, a project exploring asylum activism is always also a project exploring processes of racialisation as the theme is itself entangles with the study of race. State bordering practices in Germany and the UK are developed systems of racial differentiation of populations, which is used to naturalise fixed hierarchical power relations (Yuval-Davis, 1992; Goldberg, 2009; Rattansi, 2007; Solomos and Back, 1996). Asylum seekers bodies come to matter precisely as markers of border and race, which must be looked at in a post-colonial context. It is therefore important to not only look at bodies of asylum seekers as subjected to harm as bordered subjects but bordered, racialised subjects.

As my fieldwork encounters have shown, there is a very particular precarity of people in the asylum process. I argue therefore for the importance of theorising the asylum positionality as a specific form of precarity in order to understand the affective structures of contemporary bordering experiences. Within the range of precarities that are produced by the border, there is a very particular irresolvable precarity of people in the asylum process. However, there is also the risk of homogenising the asylum experience. Bordering processes impact subjects in different ways depending on their complex social position, which is based on a multitude of positionalities: from race, class, gender to personal histories and experiences. The asylum is thus one of many different social positionings and through its entanglement, with other positionings, it creates different experiences.

### *Asylum activism*

When I started my research in autumn 2015, I thought of asylum activism as everything that happens in spaces of organised "politics" - groups meetings, protest events - everywhere where people come together to speak about and act towards changing the asylum system. My picture of activism was rooted in images of public protest events and mass movements of asylum seekers themselves as well as people in solidarity. This impression was formed by my experience as an activist over the last 10 years and my theoretical readings of protest and social movement literature in which activism is often portrayed as unconventional physical public activity (e.g. McAdam, McCarthy & Zald, 1996; Della Porta & Diani, 2009; Opp, 2009). These scholars portray activism as a joint public action such as a demonstration, street blockage, assemblies and direct actions and often discuss these actions within the confines of a single movement (McKay 1998; Pickerill and Chatterton 2006; Crossley 2003; Chesters and Welch 2004). Being an activist in that sense means trying to influence the government in making and implementing policy, actions of authorities, and so forth.

When my engagement in asylum activism started, I paid attention to group activities and events, which I understood as "the field". The asylum activist community appeared to me as a more or less formally organised space consisting of different terrains. With formally organised space I mean coordinated group spaces in which people met to organise public protest events such as demonstrations, prides or blockades. I refer to "formal" activist spaces in contrast to the other spaces of asylum activism I explore in my research such as the everyday. There was a regularity to most of these formal activist spaces. All groups had weekly meetings and the meetings were

structured in similar ways: Usually, they started with a quick update on current events, followed by a reflection on recent protest actions of the group. Afterwards, there was time for the organisation of future actions. Some groups did readings on famous activists and/or political theory. The last 10-30 minutes were kept for questions and other inputs. Attending meetings and events of five asylum activist groups in London, my writing was focused on exploring political subjectivities by looking at big public events such as protest actions and demonstrations. I understood an "activist" as a person who appeared in these organisational spaces and self-identified as an activist.

Months later, in Spring 2016, it was my deeper engagement as well as friendships with asylum seekers that brought me to expand my notions of activism and the political and turn towards the "the everyday" of activism. A lot of asylum seekers did not frame their involvement as "political" and often eschewed the realm of official, organised politics. In media and social movement literature activism is understood as a "politics in action" or a "political way of life". The assumption that there is a political way of life, however, always comes with the idea of "the political" as a specific sphere, separated from a non-political life: the everyday. My conversations with asylum seekers turned my attention towards this "non-political life"; what happens alongside and outside of these activist group spaces I was involved in and what happened within them but went unnoticed. Asylum seekers shared many stories about little acts of care, of solidarity, of hope they exchanged with other asylum seekers that seemed to transform their lives in significant ways, although these acts were not framed as activism or being political. Hearing these stories inspired me to contemplate and reconsider my notion of activism and engage with literature that critiqued a more traditional understanding of political activism.

Turning my attention towards the "background", the everyday, meant turning away from the big public events such as protest actions and demonstrations, where my focus was at first. Historically, when we think of activism, images of rallies, protests, and large-scale collective action come to mind. At the heart of these traditional representations of activism is the subject as an autonomous, rational, coherent agent governed by logic and reason. The act of activism is generally considered as a planned and intentional act, the outcome of hours of organisation and planning to achieve a certain end or aim (Horton & Kraft, 2009). What happens before and after these staged events, was rendered as not important. All of these little acts of care, of solidarity, of hope I observed and was told about, however, happened outside of these formal spaces of political organising - they took place in the everyday.

From the 1960s, an emergent body of literature on activism tries to decentralise traditional understanding of activism as grant actions in public space and to politicise the everyday (McCarthy & Zald, 1977; Abu-Lughod, 1990; Abrahams, 1992; Chatterton, 2006; Martin Hanson & Fontaine, 2007; Horton & Kraft, 2009; Pickerill and Chatterton, 2006; and Chatterton and Pickerill, 2010; Zembylas, 2013). Most of these scholars argue that the prioritisation of particular types of activism produces a very narrow understanding of activism, manifesting in the acknowledgment of dramatic, grandiose, and iconic kinds of activism – such as large marches and public demonstrations and the spectacular, "staged" actions – to the exclusion of a range of "banal" activities in daily life.

My encounters with asylum seekers also made me aware of the naturalised neglect of feelings and emotions in these spaces, which were not registered in formal spaces of asylum activism despite their clear presence. I observed and felt subtle discomforts, dynamics, and feelings that were repeating itself whenever I sat in group meetings or attended events. As mentioned in the previous chapter, in these meetings asylum seekers often felt "out of place". Activist spaces are often imagined as spaces of "action" and "significance", however, as I will explore in the following

chapters, in this formal spaces of asylum activism, I observed action and inaction, movement and stillness, words and silence, involvement and distance that became a language through which different positionalities in these spaces were communicated. It was turning towards emotion and affect that gave asylum seekers and me a more detailed understanding of the dynamics we observed and felt.

Conversations with asylum seekers about how they were feeling in formal activist spaces brought me closer to understanding political action as showing "as political" what was viewed as "private", "everyday" or "invisible" such as feelings, emotions and material affects of the division in a "political life" and "non-political life". I, therefore, use the term "the everyday" in the following for everything that is placed outside of what we call the political. The everyday here thus includes day-to-day acts as well as what is not made political within formal activist spaces: emotion and affect.

As outlined before turning towards to everyday, required a different methodology that allowed me to attend to the doing of the asylum positionality in these spaces. All 40 asylum seekers I was in conversation with were interested in exploring the question of how asylum activist spaces make them feel, what affects and emotions are produced in this spaces and how they are linked to their social positioning as asylum seekers. While I could feel their discomfort during and outside of group spaces in form of gut feelings, discomfort and embarrassment in my own body - it was mainly our many conversations that allowed me to get a closer understanding of the discomfort. I thus began to be interested in emotion and affect and its doings in activist spaces.

### *Turning towards emotion, affect and the body*

Alongside with this exploration of everyday activism and the attempt to consider acts in everyday life as activist acts, acts with political relevance, there has also been a growing interest in the role of emotions and affect in activism (Aminzade and McAdam, 2002; Flam and King 2005; Goodwin & Pfaff, 2001; Goodwin, Pfaff & Polletta, 2008). Scholars have attended to the "interior" dimension of activism by exploring activism as relational, corporeal and emotionally laden (Brown & Pickerill, 2008) and how social movements activate emotions in others such as fear, anger, and shame to mobilise collective action (Gould, 2002; Holmes, 2004; Brown & Pickerill, 2009). Some feminist scholarship on witnessing has attended to the role of emotions in creating political communities (e.g. Ettlinger, 2009; Gibson-Graham, 2011; Katz, 2004) and the political possibilities of work performed on the basis of compassion, friendship, love. Emotions are political and can be used to sustain certain power structures rather than being individual, subjective responses to external factors (Illouz, 1997; 2007; Ahmed, 2013). Hence, they can also be used to challenge conditions of power (Wilkinson, 2009).

Alongside the engagement with affect and emotion, scholars attended to the corporeal materiality of resistant subjectivity. Butler for example engaged with the body as a space of resistance (2015). In conversation with Arendt's notion of the political, she rethinks her ideas of a political subject constituted by action and speech and argues that we need to think the performativity of politics beyond speech and acts to include actions of the body. Here the body is a site of struggle, a space where inequality and social order is negotiated. She argues: "the concerted action that characterizes resistance is sometimes found in the verbal speech act or the heroic fight, but it is also found in those bodily gestures of refusal, silence, movement, and refusal to move (p. 218)". This way of

conceptualising the political body resonates with my experience in asylum activist spaces, where I often observed and felt acts of bodies speaking louder than words.

Next to this emotional turn in critical and feminist literature, in the last decade, there has also been an emergent affective turn in social sciences (Clough and Halley, 2007). This scholarship is inspired by Deleuze, the philosophy of Spinoza, Whitehead, and Bergson. Affect draws attention to the ways in which “bodies” shift into new formations through their encounter with other bodies. While some affect scholars think of affect as pre-discursive, as disturbing normal (communication) structures (Massumi, Thrift, Brenning), hitting the body first and then the cognitive apparatus, others (Butler, Ahmed, Wetherell, and Blackman) have criticised the dichotomy between mind and body, emotion and affect.

My field journey revealed how affect is linked to meaning-making through both, the body and the discursive. Asylum seekers discomfort in formal political spaces was made visible through their bodily reactions and mine, as well as our ongoing conversations that reworked existing narratives and discourse terms and practices that opened the possibility for meaning-making beyond these existing forms. Our conversations, as I will argue, were what made the affects, emotions, gut feelings and observations powerful - in the sense as they provided spaces to attend to, to share - for "affect to travel" (Wetherell, 2013). Asylum activism as affective emotional practice thus folds together bodies and meaning-making.

My fieldwork pointed at the importance to pay attention to affect and emotion to understand how difference works in activist spaces - to pay attention to the doings of different histories, positionalities and everyday lives beyond status and political agency, beyond the public and visible story - to register the micro-politics of asylum activism. Contrary to Massumi's, my fieldwork showed the importance to look at what conditions shape the experience of affect and emotion. It was the subtlety of the dynamics that I was observing and the material bodily dimension that captured my attention. Many dynamics escaped language and action - some were expressed in sitting in silence or falling asleep during group meetings. Most often it was an absence - a withdrawal of action, speech or participation - that marked it. It was my subjective embodied experience of these absences, a personal feeling based on my long-term involvement, friendships and the observation of social norms and practices, that I took as an indication of ruptures and intensities which spoke for different positionalities and everyday lives. Interpreting these absences and being in conversation with asylum seekers about them was only possible because of the space of intimacy, an atmosphere of trust, that developed with time. It was our closeness that allowed me to not only experience asylum activism in the United Kingdom and Germany in spaces such as meetings and events but to look and feel beyond the distinction between the political and the “private”, everyday.

There has been a growing scholarly engagement with how affect and emotions emerge from specific subject positions and contexts. Emotions are imprinted with histories, values, and politics (Ahmed, 2004). Affect and emotion emerge from their specific context as well as they have the power to generate meaning through the histories and contexts that they invoke. Affect scholarship, however, often ignores the social and cultural context of affective formations. Tolia-Kelly (2006) and Rose et al (2010) for example have argued that theories of affect neglect how affective experience is "a cumulative, and therefore historical, process of interaction between human beings and place" (in Kobayashi et al, 2011, p. 873). Divya Tolia-Kelly (2006) described affect geographies as "ethnocentric" as "underpinned by universalist thinking" as most scholars do not contextualise encounters historically as well as do not take existing power structures into consideration. Similarly,

Barnett (2008) argues that a missing social and historical contextualisation of specific affects “suggests a mute attunement to place bereft of political, social, and cultural orientations, delimiting peoples agency, expectations, habits, and objectives”. Although conceptual conversations on affect, race, and encounter have been initiated by for example Sara Ahmed (2007, 2010), Arun Saldanha (2007), Nigel Thrift (2004; 2010; 2016), Divya Tolia Kelly and Mike Crang (2010a; 2010b) and many more, research that weaves theoretical and empirical insights is just emerging.

In the following, I want to illustrate the importance of contextualising the affects and emotions experienced in asylum activist encounters by attending to conversations about emotional work.

### *Turning towards emotional work and its context*

After starting to pay attention to the role of affect and emotion in asylum activist spaces, I observed that the majority of my conversations with asylum seeker activists in the first few months of my fieldwork were a dialogue around care and emotional work in these spaces. Our conversations revealed how building and maintaining affective relationships in these activist spaces is an indisputably valuable and essential part of activism that is often not considered as being part of “political activism”. Not only do these small everyday acts of networking and care constitute activism, they can also be described as unrecognised acts of reproduction - the domestic sphere of activism that creates and sustains it. They make staged actions such as demonstrations possible, which links to scholars understanding of some forms of everyday, implicit activism. What I want to focus on here though, is asylum seekers expression of an additional and different focused necessity of care within the asylum activist community that is determined by their particular asylum positionality within the state. Over half of the 40 asylum seekers I interviewed, retreated from activist group spaces as they did not feel that their additional and different focused necessity of care within the asylum activist community was taken into consideration, leaving them with much discomfort. All asylum seekers I have spoken to are part of personal networks of care (outside of formal activist spaces) consisting of other asylum seekers. In these networks, asylum seekers exchanged acts of hope, solidarity, and care which are expressions and responses to this additional and different focused necessity of care. Contemplating these happenings led to a turn towards literature on reproductive labour and care in activist spaces to further understand what affects and effects they produce.

For a long time, social reproduction - care and emotional work - has not been given much attention in the literature on activism (Thorburn, 2017). There is a tendency in activist theory as explored in more detail earlier to focus on the visible and staged work: tactics, public appearance, media presence and its impact on established political discourses. Only recently scholars started to explore the role and distribution of unpaid work such as emotional labour in activist spaces (Bosco, 2007; Pratt, 2009; Oliver, Cadena-Roa & Strawn, 2003; Bosco, 2006; Koopman, 2008; Wright, 2009; Feigenbaum, Frenzel & McCurdy, 2013; Halvorson, 2015). Materialist feminists originally developed the concept of emotional labour to theorise the unremunerated and unrecognised work typically performed by women in the home and the extension of this labour into poorly remunerated and low-status waged workplaces (Federici, 2012; Hochschild, 1991; James, 2012; Weeks, 2011). Insofar as emotional labour nourishes people's capacity to form, sustain and actualise activism and its emotional bonds, this labour is also an animating force behind political action. Yet this world of activity and feeling that is indispensable to the daily re-making of life itself is typically banned to the backstage of political life.

My engagement with this literature mirrored the importance of care in political spaces that was revealed in my conversations with asylum seekers that were infused with intense emotion. In a group conversation after a meeting in central London in January 2016, a woman from Cameroon told me that “there are times when you are so stressed, you can just bring people together and give them sandwiches. One Sunday a month (not every week) we could just eat sandwiches. That’s how you come to know people as one. But if we come every week and you just sit and then you go again you don’t even have the chance to know me.” A man from Uganda told me when he was visiting me at my home in a conversation about the missing care-work at two meetings we have recently attended together “the truth is us Africans we like meetings where people are coming together to eat and drink, to relax. To tell their story, how they are and others are listening.” In another group conversation about the lack of emotional work in asylum activist spaces in a local park, an asylum-seeking woman from Nigeria said “after your stressful week – you just want to sit and chat. Tell everyone how you are.”

The emotional intensity I witnessed among asylum seekers reflects how care work - from offering tea and food to asking how you are, comforting and listening - forms the emotional core of asylum activist spaces. Close observation revealed how the asylum positionality, in particular, demanded a big amount of emotional work.

However, the literature on care and emotional work I read did not quite capture what I was encountering in my conversations with asylum seekers. Unlike this research on reproductive labour, my conversations with asylum seekers about care work did not revolve around the division of the means of care - the questions “who does what?” but much more around different needs of different actors within this spaces resulting out of asylum seekers social positioning as bordered racialised subjects and the depletion and exhaustion with which they entered these formal activist groups spaces. These conversations asked to situate asylum activism better and look at the different contexts, histories and embodied everyday experiences with which people enter activist spaces. As this shows, the de-prioritisation of care in “the political” in favour of the old model of politics has a stronger set of implications in a situation of everyday bordering. This conflict of interest asks for a political consciousness in which caring is invoked as a symbol of power to build a different kind of community within the movement. A lot has been written on how the body of migrants is subjected to countless striations through state regulations and institutional forces. There is no reflection in formal asylum activist spaces, however, how these striations influence people's need and capacities to look after themselves in a collective practice of reproduction.

The politics of different positionalities and contexts are barely discussed in this scholarship on the everyday beyond newly emerging writings on gendered, sexed and racialised care work or emotional labour. A few studies also look at the labours of racialised bodies in activist spaces but mostly focuses on the tendency of racialised, feminised and minorised bodies to do the “background” work (Ahmed, 2006). While this is an important area of research my focus here is slightly different. The scholarship on gendered, racialised and sexed care work, asks the question “Who does the background work?”. It asks to include more activist acts (such as care work) as political work and shows how not doing so is making the background work invisible, and by that is making the work of racialised and feminised bodies invisible.

Similar to this literature, my conversations with asylum seekers contemplated the entanglements of the politics of activism with the politics of different positionalities. However, the focus of our conversions were not specific activist labours but rather different needs of different actors within



this spaces resulting out of asylum seekers social positioning as bordered racialised subjects and the depletion and exhaustion with which they entered these formal groups spaces of activism. More importantly, they pointed at the importance to pay attention to affect and emotion to listen to the doings of different positionalities and everyday lives in these spaces. Emotional labour literature, on the other hand, mostly focused on the gendered aspects of and who does the necessary care work of political activism. Instead, I want to argue that my encounters with asylum seekers point at the significance of the question of how political spaces feel and how emotion and affects speak for different positionalities and everyday lives. How emotion and affect are linked to how we are positioned differently in the word.

### *Turning towards precarity and the asylum*

Judith Butler (2015) has explored how precarity and the body is linked to the political action. She argues that only the sustenance of the body in the private allows the actor to appear publicly; only the "well-fed body speaks openly and publicly" (p. 206). Having your basic needs (such as adequate housing, rest, education) met, are according to Butler, not only necessary requirements of a livable life, but also for political involvement, of action: "Living and acting are bound together in such a way that the conditions that make it possible for anyone to live are part of the very object of political reflection and action" (p. 44).

According to Butler, there is a vulnerability we all share. The body, for Butler, is "vulnerable by definition" (Butler in Lloyd, 2015, p. 214). "All responsiveness to what happens", she argues, "is a function and effect of vulnerability" (Butler, 2012, p. 16), including "all the various ways in which we are moved, entered, touched, or ways that ideas and others make an impression on us" (Butler in Lloyd, 2015, p. 214). This vulnerability we all share, she distinguishes from precarity - the historical condition whereby some lives are rendered more insecure, unequal, or destitute than others. Precarity for Butler signals a politically generated condition of heightened risk and threat for specific populations, the "political condition of unequal distribution of exposure to harm" (Butler, 2015).

The asylum positionality comes with a multiple precarity. During my fieldwork in asylum activist communities in London and Berlin, I witnessed endless moments, in which bodies of asylum seekers were subjected to harm. Asylum seekers were subjected to harm whenever they walked past the police. Asylum seekers were subjected to harm when the police ask them during protest events for their details. Asylum seekers were subjected to harm when constantly worrying about money and food. Asylum seekers were subjected to harm when only receiving 36 pounds a week to cover everything from food to travel expenses in the UK, where the cost of living is high. Asylum seekers are subjected to harm when collecting their 36 pounds at the post office every week. They were subjected to harm when I invited them over to my house and they were not able to come because they were running out of money. They were subjected to harm when feeling discomfort whenever I paid for something or offered them money. Asylum seekers were subjected to harm when they were not able to attend a demonstration because they could not afford the journey. They were subjected to harm when asked to eat food in Berlin's asylum camp spaces that made them sick. Asylum seeker women and children were subjected to harm when the spicy foods mothers were served led to their children refusing to breastfeed. They were subjected to harm when having no agency in deciding what they want to eat at when. Asylum seekers were subjected to harm when their most intimate relationships were infiltrated by bordering processes. They were subjected to harm when constantly having to worry about their basic needs being met. They were subjected to

harm when reporting to the home office, never knowing if their very presence might end up in them being detained. Asylum seekers were subjected to harm when living in camp spaces with a complete lack of privacy and safety, particularly for women. Asylum seeker women, who had experienced sexual violence at some point in their lives, were subjected to harm when forced to live in a camp space where they were controlled and harassed by male security guards. They were subjected to harm when being deprived of sleep. Asylum seekers were subjected to harm when their bodies were forced to constantly manage and negotiate feelings of fear, stress, and powerlessness. They were subjected to harm when the markedness of their racialised bodies meant being asked to leave a pub where we met to work on one of our projects together. Asylum seekers are subjected to harm when walking on the streets worrying that the markedness of their racialised bodies could lead to harassment or violence. They were subjected to harm when bordering processes produced constant feelings of sadness, anger, worry, helplessness, and depletion.

Asylum seekers cannot escape these bordering harms as they stick to their bodies. Feelings, emotions and affects that are produced through this multiple precarity are not left at the doorstep when entering asylum activist spaces, these different contexts, positionalities, and everyday lives affects bodies and relationships within activist spaces. When I started my fieldwork I was looking for angry politicised asylum seekers that are able to fight violent state practices, however, most asylum seekers I became to know better were not involved in direct action politics but just trying their best to get by. A narrow neoliberal understanding of activism would frame my encounters as encounters with non-political subjects that "fail" to resist. However, instead, I want to ask how we can learn to listen to "other" politics. A reformulation of political space and political subjectivity is necessary, I argue, in order to listen to the politics of asylum activism.

Only attending to citizenship as the only mode of politics in the case of my research would have meant not hearing anything from the voices I have been speaking too. As this paper hopes to illustrate attending to the politics of asylum activism meant focusing on unfamiliar and unnoticed acts of politics within asylum activist spaces. Recognising the potential of embodied acts can open up ways of conceptualising politics beside citizenship that allow for a more complex consideration of different positionalities. In order to understand how different positionalities and everyday lives play out in political spaces, we need to ask again what political space is? Different positionalities played out in asylum activist communities in ways that I could not have observed in language. It is thus a matter of learning to hear the voices, to attend to expressions of the political that are traditionally not perceived as political. How can we understand a politics that is not enunciated in speech or formal political intervention? How do communication and symbolisation happen in a much more expansionary political space?

Ranciere's work turns to expressions of the political that are traditionally not perceived as political and therefore engages with a notion of the political that involves questioning seemingly giving borders beyond established forms of the political. Completely refusing the citizen-subject as the subject of politics, Ranciere writing contemplates the possibility of politics for those who have no rights. According to Ranciere, the subject of rights is not a fixed subject – one dependent upon a conferred legal and political status (such as the citizen) - but the ever-fluctuating subjects of politics. He argued: "politics exists when the natural order of domination is interrupted by the institution of a part of those who have no part" (Ranciere, 1999). According to Ranciere, the space of activism is thus not a specific physical space that structurally excludes some subjects from appearing, but it opens up whenever the "order of things" (Foucault, 2002) is interrupted. Thinking the political through Ranciere means, thinking through exclusion and ruptures - the part that "has no part" has the ability and power to disrupt. His thinking resonates with my experiences of asylum activism.

Thinking with Ranciere, the question of the possibility of politics in the context of asylum activism becomes the question of the possibilities of disrupting bordering processes and ideas of the political that excludes some from participating. In consequence, asylum activism can be found in both - formal asylum activist spaces, where asylum seekers questioning established ideas of the political and in the everyday, where the encounter with the border also brings the possibility for resistance. Rather than tying activism to a particular group involvement or space, I propose to consider acts of asylum seekers that open up political possibilities by stepping out of the formalised othered situation of being a non-political, racialised, bordered other not by becoming the formal subject of political rights but in “becoming other, other” - a new subject of politics.

### *Moving forwards: Possibilities for “other” politics*

In order to attend to the possibilities for “other politics”, we need to ask - What allows us to register the doings of different positionalities and politics in their affects and emotions in these spaces of asylum activism? How can we attend to the politics of asylum activism in all its subtleties, in its background, emotions and feelings and relationships? How can we attend to political expressions when they traditionally escape our senses? Seeing citizenship as the only mode of politics depends on a particular physical comfort that excludes some bodies such as bodies of asylum seekers from appearing. What I want to attend to now is the question of a politics of the un-well and un-fed body, the body in discomfort, in spaces that are not perceived as political space?

As explored before, Butler sees precarity and vulnerability also as an important force in political action (2015). She argues that the right to appear politically is regulated by norms of recognition that affect bodies possibility to appear disproportionately. Not embodying the norm, however, can open up possibilities for resistance - has the potential to re-do the norm in unanticipated ways or even, in some unspecified circumstances, to un-do the norm and thus to “disrupt” existing categories, ideas, structures of emotions and subjectivities. So how exactly can precarity and vulnerability be a condition for embodied political action? The assembling of subjects in resistance, simply the appearance of their bodies might be “saying” something (without relying on speech). This can either happen through the embodied, visible disrupting of norms or because the assembly happens in opposition to “differential forms of power that qualify who can and cannot appear” (p. 50). In other words, simply the presence, the appearance of a part that “has no part” (Ranciere, 1999) can disrupt a social order as it is an embodied critique of who is allowed to appear in public space. When asylum seekers who are erased from communities and public spaces, bodies that are made invisible and disposable, appear despite these conditions, they are challenging the social order. As Butler said, “only through an insistent form of appearing precisely when and where we are effaced does the sphere of appearance break and open in new ways.” In other words, when bodies appear, where and when they were not assigned to appear, and assemble where and when they were not assigned to assemble, or even feel what they are not assigned to feel, these bodies appear politically, and by doing so, disrupt the order of things.

Butler does not attach the political to specific spaces that excludes some bodies but sees its appearance in precarious and vulnerable bodies gesture to “the right to have rights”, and by that, to become “part”. Bodies are not only able to resist despite their precarious and vulnerable lives, but because of these conditions. It is their collective gathering in public space, while Butler argues that public space as such does not exist. Public space is anywhere were bodies “reconfigure the materiality of public space” (Butler, 2011); by laying claim to that space, they constitute it as public.

Butler thus opens up our understanding of the political citizen subject by saying that the asylum seeing subjects, when breaking into the formal spaces of the political such as the politics of squares disrupt the formal space of politics and as such are political. However, Butler's focus lies on the political spaces of the squares, of the public. I am looking at spaces that are not public in the same sense in which the not-yet citizenship subject is a necessary audience, the object of politics. Resistance in her engagement with the precarious body implies an intervention in formal political space not creating a parallel to this formal space as my research result show. The kinds of emotional and affective dynamics I have seen in these spaces feel different to Butler's theorisation and require a reformulation of what political space and what political subjectivity is - to encompass a range of things; reaching from a gesture, to a subtle feeling, to a speech act.

Looking at asylum activist spaces as spaces in which different social locations and experiences meet, and paying attention to the emotional and affective doings of these different positionalities is necessary, I argue, if we hope to recreate activism as a space of care that all bodies can inhabit, especially marginalised bodies of asylum seekers. Paying attention to what allows for mutuality and closeness, a common politics, in formal spaces of asylum activism and beyond (in the space of the everyday) also is an important learning point for a wider social justice project.

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# *Therapeutic Citizenship and the Teaching Profession: New Theoretical Approaches of Zambian Teachers Living with Human Immune–deficiency Virus (HIV) and on Antiretroviral Therapy (ART)*

Sanny Mulubale

## Abstract

Teacher training, teachers' economic status, their use of effective pedagogy and many other factors have been chronicled extensively by various scholars across disciplines in research on education in developing countries. However, teachers' experiences of illness and health conditions, as key actors in implementing the development agenda of many countries in Africa, have received very limited attention. The HIV/AIDS burden in Sub-Saharan Africa (SSA) is higher than available resources to deal with the pandemic effectively (Kharsany et al. 2016) while the number of people living with the virus and on ART in SSA countries, such as Zambia, remains high (UNAIDS 2017). This article discusses HIV positive teachers' medicalisation in the Zambian context. It makes a theoretical appraisal of the dynamics of health in this HIV treatment era, viewing the era as leaving the AIDS pandemic between two streams: a disappearing tragedy and a treatable illness with latent psychological, social and economic effects (Lichtenstein 2015:858). The above proposition in this paper is supported by three fundamental concepts which can be surmised as: governmentality, identity and chronicity. These three concepts – when effectively synthesised – offer new ways of understanding the medical solutions, normalcy, and their limits in the everyday living of teachers who are on ART. Based on this theoretical analysis and its relation to existing empirical data, the central argument in the paper is that teachers' daily lives seem to be filled with the socio-political and economic consequences of HIV medicalisation and that these consequences seem to shape and limit how teachers manage and make sense of their acquired 'therapeutic citizenship' status.

**Keywords:** Identity, Chronicity, Governmentality, Teachers, Therapeutic Citizenship, HIV, Development, Illness, Health, Zambia

## *Introduction*

The United Nations' Sustainable Development Goals (SDGs) are aimed at eradicating poverty by 2030, with SDG number three focusing on 'good health and well-being'. One target under this goal is to reduce HIV and other diseases, with HIV/AIDS still is a national disaster and hindrance to development for many Sub-Sahara African states (UNDP 2016; UNAIDS 2014). Through the integration of Millennium Development Goals (MDGs) into its monitoring and evaluation process, most African nations, including Zambia, have made good progress in the fight against HIV/AIDS. The combined efforts of international and local stakeholders on achieving MDGs has reduced the threat of communicable and infectious diseases on social, economic and human development. Moreover, action to attain the MDGs led to community-based and multi-sectoral approaches to national responses on such diseases as HIV/AIDS in most SSA countries. However, diseases like HIV, through its complex medical needs, still poses a serious threat with varying effects to individual wellbeing and national development in sectors like agriculture, mining, health, and tourism, as well as education (CSO 2014; UNDP 2010).

In relation to education, Target Five of the 2014 UNESCO Muscat agreement on Global Education for All – GEA – admonishes that by 2030, 'all learners acquire knowledge, skills, values and attitudes to establish sustainable and peaceful societies, including through global citizenship education and education for sustainable development.' Target Six challenges all governments to 'ensure that all learners are taught by qualified, professionally – trained, healthy, motivated and well – supported teachers' (UNESCO 2014:3). Reports indicate that HIV/AIDS has a strong effect on work (UN Chronicle 2011), given that the most affected or infected are those who are in the productive years of life, in relation to paid and unpaid work.

The aim of this article is to discuss some theoretical issues around HIV positive teachers' medicalization and normalisation in the Zambian context. Ren (2002) defines medicalisation as a social practice which transforms behavioral, emotional, and physiological human conditions to an entirely medical problem of Western medicine. Additionally, medicalisation is a process of unending treatment of the body which has an effect on the mind and behavior of an individual as well as actions of a group (William and Gabe, 2015). It is important to note that medicalization involves process because in relation to any health conditions there can be degrees of it. The normalization of HIV, on the other hand, is both medically oriented – people living with HIV when treated are 'normal' physiological bodies – and socially framed – when people with HIV are, regardless of treatment (though usually treatment is seen to play a role in this) now largely seen as 'normal' citizens, people 'just like us' (Squire 2013:90 – 104). Thus, therapeutic citizenship is an arena through which trends of HIV medicalisation and normalisation can be understood.

The paper is divided into four sections. The first parts, after this introduction section, gives a methodology which demonstrates and justifies the approach that was followed for this article. The method section is followed by brief definitions of some significant concepts. The second section is about an account of the Zambian health and HIV situation in relation to development and teachers. This account is given in line with some notions of medicalisation and normalisation that are defined in the next section. In the third part, we engage identity, governmentality, and chronicity in understanding how teachers govern their health in the light of HIV in Zambia. The fourth and

final section uses notions of identity, governmentality, and chronicity as entry points into a theoretical inquiry aimed at understanding and re-conceptualising or extending conceptions of ‘therapeutic citizenship’ and their implications for development narratives in general.

### *Conceptual method*

Antiretroviral drugs have helped to increase longevity; the research focus must now be more on qualitative (rather than quantitative) empirical explorations of conceptual accounts to explore how people living on medication can find meaning when living with HIV as a chronic condition. Quantitative research gives morbidities – death and illness rates and their causes - but not details of experiences of living with a chronic, and yet still potentially fatal illness. Thus, assessing the level of a population’s health cannot be satisfactorily done without qualitatively considering the economic, political, social and psychological effects of living with a disease that requires daily medication (Wahlberg and Rose 2015:61). Here, the focus is on a preliminary step towards such qualitative investigation: examining the conceptual framework within which qualitative investigation can proceed.

Since teachers are the largest group of government employees in Zambia, the impact of HIV treatment on teaching – whether disruptive or positive – make this a national and development issue. Moreover, the additional complexities of living with a chronic condition also render it unlikely, as with HIV itself, to be understood fully by quantitative study alone. The downside effects of HIV on the socio-economic fronts are vast and well documented. However, enhanced ART coverage for teachers has largely been seen simply as cost-saving in Zambia (Risley et al. 2012: 12).

With the above justification in mind, this study is a first stage conceptual project, prior to my further empirical investigation (see Mulubale, S. forthcoming, *Identity, Governmentality, Chronicity and Development: A Study of Zambian Teachers Living with and affected by HIV and ‘Therapeutic Citizenship’*), which engages accounts of representations and experiences of teachers with HIV in the Zambian context. An argument is made that suggests a new theoretical synthesis of issues around health, development and what it means to be a Zambian teacher on ART. It is hoped that this discussion will also shed light more generally on the complexities of lives lived with HIV and ART in the current and future epidemic, in SSA and elsewhere (Kharsany 2016). In the section that follow, let us define and contextualise HIV.

### *Understanding and contextualising HIV*

HIV is an infection that weakens the immune system of the human body and once acquired leads to life-threatening problems and death. However, treatment with antiretroviral (ARV) drugs can slow or stop the development of HIV into AIDS and can reduce infectivity. There has been immense investment in combating the HIV/AIDS epidemic (Whiteside 2016), in treatment, care, and in reducing transmission, which occurs via particular sexual, reproductive and drug use behaviours and which is socially driven (Squire 2010; Whiteside 2006; Whyte 2015).

HIV/AIDS is on the global development agenda. For example, the MDGs’ eight international development goals had a specific and exceptional focus of combating HIV/AIDS, Malaria and other diseases on goal number six. In 2015, a strategic plan for 2016 – 2021 was released, by the

United Nations AIDS (UNAIDS), in line with the current Sustainable Development Goals (SDGs), which calls for strengthened global response in HIV prevention, diagnosis and treatment (UNAIDS 2015). In parallel, country-based actions are aimed at working towards an integrating version of HIV testing and treatment services into a range of care flows to reach the UNAIDS'90–90–90 aims: By 2020, 90% of all people living with HIV to identify their status, 90% of those who know they are HIV positive to have access to treatment, and 90% of those on antiretroviral therapy to have undetectable viral loads.

As mentioned, the social drivers of HIV transmission are powerful, and poverty is preeminent among them. Most people living with HIV and in developing countries are poor. About 78 million people have been infected from the time the first case of the epidemic was documented, and an estimated death toll of 35 million people world-wide has been linked to AIDS (UNAIDS, 2016). The majority of those living with and affected by HIV are poor, and most poor people who are HIV positive are in developing countries of East and South Sub-Sahara African. These blocs account for over 19.4 million people living with HIV, recording about 790,000 new infections at the end of 2016. About 51% children and 61% adults are receiving ART and over 420,000 deaths were AIDS related in 2016 (UNAIDS 2017; UNDP 2016). There has been progress in HIV treatment efforts around the world in spite of challenges. People living with HIV in underdeveloped nations have benefited most from generic drugs and scale up projects. Yet in spite of nationally, regionally and globally driven programmes in the fight against the pandemic, there are ongoing debates regarding how HIV has problematised life expectancy, deepened poverty, decreased socio-economic development and fractured education and health systems (UNAIDS 2016; Whyte 2015).

HIV treatment can produce some psychosocial as well as physical challenges. For example, stigma which is often taken as the labelling and devaluing of individuals based on undesired differences that increase social isolation (Squire 2007:123). Treatment has reduced stigma due to the social acceptance that comes with the healthy physical appearance of HIV positive people who are on ART. Now, stigma appears to have taken a new form that stems from discrimination on basis of being on ART. Discrimination against medicalised people in HIV is a social identity issue because it attaches unwanted labels through moral appropriation on an HIV positive person (Goffman 1987). Thus, medicalisation can possibly include cultural and social processes of categorising people on the basis of their health condition and treatment needs (Stutterheim et al. 2017). Although some gains have been recorded in the fight against the pandemic in Africa and Zambia in particular, the disease still poses a serious threat with varying effects, ranging from individuals' wellbeing to national development in sectors like agriculture, mining, health, and tourism, as well as education, the focus of this paper. Zambia may not meet the 2030 health related SDGs and GEA deadline. One instructive example of such potential failure will ensue if development and well-being issues around HIV for teachers in schools are not investigated and fully addressed (Kelly and Bain 2003). In this and based on conceptual context, HIV positive teachers do experience some 'on and off' episodes of wellness and illness both physically and mentally, but how this affects their roles in schools can possibly be explored.

Using the concepts of governmentality, identity, and chronicity the article attempts to ascertain the dynamics of health in this treatment era that seem to be leaving the AIDS pandemic between two streams: a disappearing human tragedy and a treatable illness with latent long and short-term psychological, social, and economic effects (Lichtenstein 2015:858). The emphasis here is on the on the second 'stream' with the first 'stream' a kind of memory that needs to be considered and that is often 'disappeared'. The two streams are thus unequal because the first stream is now much

weaker due to advancement in treatment technologies. The next part introduces, defines, and qualifies the key concepts that are employed in this paper.

### *Defining and outlining the importance of key structuring concepts*

Many investigations in the social sciences have been inspired by Foucault's conceptualization of government. He used the term 'governmentality' to define a particular way of managing people in the modern history of Europe, in relation to the idea and practices of the state. He later amended the theory to capture procedures used to govern people beyond political and administrative levels (Bulley 2014).

Identity is a concept that is often applied in a broad sense. It has been used with ambiguity in exploring the collective present, past histories, and life subjectivities in socio-political contexts (Goffman 1968, Turner 2000). Most of its usage concerns processes of populations-cohesion that is driven by both political and social connotations of individual uniqueness, group representativeness, belonging, power acquisition and recognition. Identity in relation to disease can be framed around prevention, care and long-term treatment (Cruz 2005). That is why when a specific disease awareness engendered through biomedicine becomes a conscious health issue, it sets up grounds for socio-political manifestations of identity around that condition. The politics of identity in health and disease relates to state of bodily and mental capabilities that make people be considered socially normal and abnormal among what are supposed to be equals in society (Pallesen 2014).

Chronicity of disease, as the term suggests, is the characterisation of a health condition's relationship with time, space, and life events. Although chronicity as a concept can be traced in Western societies which embrace individualised identities more than collective ones, it has been successfully applied in many non-western cultural contexts to examine the impact of chronic diseases (Manderson and Smith-Morris 2010). Curtin and Lubkin (1995) define chronicity in relation to illness as the irreversible presence, accumulation, latency of disease states or deficiencies that involve the total human environment of supportive care and self-care, maintenance of function, and prevention of further incapacitation. The theory of chronicity generally deals with long-term subjectively experienced medical conditions of everyday life, which may or not have a cure.

When critically synthesized in relation to HIV's therapeutic citizenship - a way of conceptualizing subjects in relation to socio historical particulars of medicalisations and normalisations of HIV (Nguyen 2008; Patterson 2015) - the above concepts offer new ways of understanding medical solutions, normalcy, and their limits in the everyday living of teachers in Zambia who are on ART. The notion of 'citizenship' signifies taking part in the public life beyond the conventional political sphere. According to Marshall (1950:10), citizenship entails an individual's full participation in public affairs and denotes an interaction among citizens, it also signifies a relationship between the individuals and the state. Contemporary developments and problems have led to an expansion of the concept and practices of citizenship (Turner 2000; Johari 2009, Steenbergen 1994:2). Patterson (2015:1) defines therapeutic citizenship as 'biopolitical membership that includes claims and ethical projects that emerge from techniques to control and manage bodies. In some contexts, therapeutic citizenship includes activism and claims-making against local, national, and international power

brokers.’ As a concept, ‘citizenship’ is useful in exploring some challenges and successes of personal and group identity. Thus, ‘therapeutic citizenship’ is a phrase that highlights the biopolitisation of populations and self-management of bodies, especially in illness, involving making of claims through local and international channels (Richey 2006; Nguyen 2010; Whyte 2012).

Thus, medicalisation and normalisation - though different and sometimes in conflict - are the overall theoretical context within which identity, chronicity and governmentality are considered within the therapeutic context of HIV citizenship. First, in order to build from an integrated theoretical framework, the medicalisation and normalisation of HIV positive teachers in Zambia is conceptually explored and examined here.

### *Zambian Teachers: Progress, Problems and Prospects of ART*

HIV positive teachers’ situations cast light on contemporary discussions of the African states. These national-states appear not to be much better but of course different from colonial times, because of the autonomy that they now possess. Although according to Whyte (215) some governments of SSA countries in this neoliberal era are perpetuating and transforming into some kind of ‘para-states’. For instance, Zambian teachers are on government payroll but many of them who are HIV positive have complex treatment and resources needs that are largely met by donor provision of free ART drugs. The first case of HIV/AIDS in Zambia was reported in 1984. Due to the impact in terms of number of new diagnoses, high deaths tolls, short life expectancy, in the past – by 2004, the government of Zambia declared HIV/AIDS an emergency national issue and committed itself to providing free ARV treatment for at least 100,000 people by the close of 2005 (Mweemba, et al. 2010). The effect of chronic conditions, such as HIV, on individual well-being and national development largely remain under-researched, both quantitatively and qualitatively, in Zambia. This paper sets out some theoretical groundings for that work.

The current state of HIV in Zambia is that over 1.2 million people are living with HIV/AIDS (UNAIDS 2016; UNDP 2016). With the prevalence rate standing at 12.4% and 59,000 new infections annually, 67% adults are on ART and there are slightly over 21,000 AIDS related deaths yearly (UNAIDS 2017). The Ministry of Health in Zambia recently increased access to treatment by creating 68 new sites in addition to supplying drugs to all existing ART sites nationwide. Assessment laboratories for monitoring of HIV-positive patients are present in almost all provincial hospitals, district and community clinics. The number of people, teachers included, dying from HIV/AIDS related illnesses, when compared to the pre-treatment era, has drastically reduced (from 66,272 in 2003 to around 21,000 in 2016) due to early diagnosis and free provision of ART in Zambia (CSO/MoH 2015, NAC 2009, UNAIDS 2017). These above figures speak to how the Zambian population is slowly being moved towards the 90-90-90 goals (UNAIDS, 2017) of near-universal and effective HIV testing and treatment – which also has preventative effects, since effective treatment correlates with lack of transmissibility, or as UNAIDS now puts it, undetectable = untransmissible [U=U] (The Lancet 2017). This increasing emphasis on medical solutions may indicate the medicalisation of HIV in Zambia, which would in turn have implications for national development.

The clinical claim of having a ‘normal’ and ‘healthy life’ when on ART is contested, particularly in relation to psychosocial issues. The notion of normalcy as perceived in medical spheres seem to

be problematic in the eyes of many social science researchers (Kippax 2010; Squire 2013:67). The concerns around HIV's medicalization and contemporary neglect of social 'wellbeing' – broadly understood (Harper 2009), indicates that the epidemic cannot and should not be 'normalised' by clinical medical approaches. Whitside (2006), Squire (2010; 2013), Whyte (2014) and Patterson (2015) all testify as to how deep and far-reaching the crisis of HIV is, and how it is far from being over, even in the treatment era. HIV like other conditions such as cancer and TB is slowly shifting discourse paradigms from that of fatal illness towards, in this case, that of chronic illness accompanied by the complexities of taking medication lifelong and living a 'positive' life. The need to shift from a clinical and epidemiological focus to exploring more social scientific ways of understanding the impact of disease is born from the idea that illnesses are not only something people acquire and die from but also something that individuals, such as teachers, live with, long-term.

In Africa, including Zambia, teachers work under hard economic conditions with very low pay. Teachers can have some cash income but they are not as rich as other professions they help shape through teaching pupils who become the needed human resource in various fields (Abdukareem, 2001; Bennell and Kwame 2007; Buckler 2016). Many HIV positive teachers' lives are relatively healthy and yet there remain medical difficulties, economic constraints, and a social stigma. The interaction between the duties and difficulties of teaching as a profession, unfavorable socio-economic conditions, and navigation through this chronic condition (Sabina 2013) and the effects of ART medication, makes teachers' lives, in and outside school, an important subject that needs to be studied. As observed by Mweemba et al (2010:2), 'In Zambia HIV/AIDS studies have focused on knowledge, counselling, behaviour change, mother-to-child transmission, and clinical presentation but there are few published studies which examine the effects of ART and HIV/AIDS on populations' activities of everyday living'. The difficulties faced by teachers on ART in Zambia can be assumed to be around their health uncertainty, self or public stigma within the school communities, and limited or no access to social and medical support networks beyond the medicalized 'normalcy' provided by ART.

A teacher is a significant facilitator for national development. Teachers in Africa bear a great obligation to yield the right kind of skills and behaviour not only for job creation but also to fill-up positions so created (Buckler 2016; Okemakinde et al. 2013; Wanekezi et al. 2011). Teaching as a profession, positions individuals as agents of development because of their role in imparting knowledge and crafting skills in learners. The pedagogical approaches that teachers use in the teaching process such as participatory learning, lectures, debate, role play, group work, questions, and answers, are vital in increasing attainment levels and enables learners develop important skills for life after school (Capel et al 2016; Farrant 1980). To achieve such learning outcomes, education systems thrive when classroom teachers are motivated and efficient (Cohen, 2009). According to Wanekezi et al. (2011) the skills, creativity, and industry of people, in Zambia will be difficult if not impossible to build without healthy teachers and more generally an HIV positive population of civil servants.

What does the process of HIV 'underdeveloping' public services look like? There have been few systematic studies that explore how the processes work out within particular sectors, especially for those affected by HIV/AIDS themselves. The high level of HIV related complex treatment challenges can possibly diminish prospects of quality assurance in Zambia's education system due to loss of experienced teachers, shortages of teachers and restricted human capital expansion (Siameja 2011:89). The quality of education in rural areas appeared especially compromised because

few teachers, particularly those who were HIV positive and needed treatment, were willing to be stationed in remote schools with no access to either transport or good health facilities. Some of these difficulties are exacerbated by lack of choice by teachers regarding the location of their deployment.

From the above we can see the complex interaction of the private and public divide of illness and health. The means of representations are significantly an identity issue when dealing with long ill health conditions and medication. The effects of health and illness may better be understood from individuals as members of a much larger social setting and profession such as teaching. With the above perspective in mind, identity construction around illness and health is discussed in the next section.

### *Identity: Sense of self and relationships in living with a disease*

The above issues render identity, as contended by Allahar (2001), a political and psychological construct that is socially located within relationships and individual codes of conduct. Historically devised set of cultural and socio-political standards facilitate the creation and sustenance of any form of identities. The complexity of identity in health is rooted in the ever-shifting and uncertain health consequences of HIV diagnosis. According to Woodward (2003), formation of social and political groups within nations is mainly precipitated by shifting identities of the self. But this is contested as there are different facets of identity beyond the 'self' around which groups can mobilise for various reasons and different times. The concept of the 'self' generally refers to an entity with psychosocial and physiological dynamism (Pallese 2014). The self derives from what people think, feel, and know about themselves based on experiences and shared communal norms (Berzonsky 2011). In this regard, identity allows integrated ways of both thinking and acting about the social and the personal: that is the lived experiences and related social facts which together create an internalised self-image (Woodward 2003). Yet in medicalisation, individuals define themselves and develop a sense of belonging through various diagnostic categories and the nature of their treatment such as ART, which bring people together through shared aspects that can be genetic in terms of having HIV. In this regard, HIV positive teachers who rely on medicine in order to function, may define themselves in relation to their viral identities and are less likely to be concerned with professional values identities such as pursuing their pupils' well-being, due to their own health burden (Tao 2013; Buckler 2016:171, Flowers 2010:114).

The pivot between biomedical identities is imbedded in relations of the state and the infected individuals and their interaction among themselves and within communities. The self and collective identity is even made more visible through the demands for recognition based on chronicity – discussed in detail later – of daily struggle that requires policy makers and services providers' intervention. That is why the HIV medicalisation process is somehow directed by decision-making and support channels to integrate HIV diagnosis into the everyday life.

Identity, when contextualized in relation to health draws much consideration on individual experiences and representations. Health and illness do interact with more general social 'labels' that become personalised, such as the image of an HIV positive person (Berzonsky 2011:58). In many cases, lived experiences, especially of bodily illnesses, are used to construct routes and destinies for ordinary 'everyday' interaction within the broader social structures and inter-subjective relations of 'identity', over a life course. However, through diagnostic medical process one gets an aligned sense



of self and collective identity. This is implicitly ratified by societal as well as medical discourses of 'normalisation' predicated by self - regulation, efficacy, esteem, and consistency.

The multiplicity of identity in biomedical processes leads to categorisation of populations. For instance, being HIV positive can be led to clustering of personal feelings of self-esteem and social co-constructions of identities that emanate from spaces such as schools for Zambian teachers on ART (Cast and Burke 2003; Munachaka, 2006; Flowers 2010). Centrality of an HIV medicalized population is mainly through a shared, relational and a time mediated product of self-perception.

The dynamic consequence of shared societal values is, in politics, capable of inducing another sense of nationality called 'ethnic citizenship' whereas in biopolitics it can generate what we are referring to here as 'therapeutic citizenship' (Nguyen 2008) discussed later. The notion of biopolitical identity and its linkage to various forms of 'citizenship' is twofold: first, the transition from individual illness awareness to health consciousness and second, move from specific disease to formation of group-membership based on similar regimes (Collyer 2015). In this view, identity is both a process and an outcome of deeply felt personal illness and public health records that give 'meaning' to biopolitical and social life (Wahlberg and Nikolas 2015; Whyte 2015; Nakata 2013).

The extent to which an HIV citizenized person can develop either a positive nor negative attitude towards their own identity is shaped by resistance of HIV normalisation amidst effective ART. That is why addressing people based on their biological condition in some communities is seen as stigmatizing, discriminatory, shameful and an undesirable in the search for social harmony and mental wellness for the affected.

Medical normalisation contravenes the many challenges that are faced by people with chronic conditions. Normalcy as drawn from medical discourses is a violation of medicalization recognition as it foists identities that shelve psychosocial and sociocultural compositions of, for example, living with HIV and on ART (Flowers 2010:115). Two differing schools of thought that have generally emerged in identity studies which are applicable in illness and health related forms of identities. The first is the view that identity labels inspired by disease and chronic conditions, just like ethnic identity – in the African context (Mulubale 2017), must not be embraced due to potential negative effects on individuals' self-esteem and the likely negative impact within communities (Whyte 2012). The second position refutes the preceding contention and argue that describing populations based on health status and other biological characteristics as opposed to nationality, ethnicity, race, and many others, is a pillar upon which healthy nations can be built through knowing, prioritising and providing medical needs of some people in communities. The resources of a nation depend on the health of its citizens and health-related identities are part of building those resources (Marmot 2015; Wahlberg and Rose 2015:77).

In a multi ethnic society where tribal identities are prevalent, like in Zambia, they compete and often integrated with biomedical identities through language labels that are shaped by notions of 'sameness and difference' when it comes to health status. For biomedically distinct individual and group to join the mainstream society, they must first situate themselves as different (Flowers et al 2006). Differences in HIV medical identity for, professions like teachers, highlight the importance of social experiences that can facilitate the process of recognition and incorporation for excluded groups based on their health condition in work place policy. Health and illness representations cannot be given absolute visible "meaning" for recognition and inclusion in diverse social and political structures because the impact of most medical transformations' effects are mental and thus hidden (Cruz 2005, Flowers 2010:116).

Since HIV is seen as a deadly disease due to lack of cure, its medicalisation has not reduced the likelihood that those who are positive are labeled as a social biohazard. Since people with many chronic conditions must make conscious adherence commitments to adhere to treatment for health or even survival, it is the institutionalisation of HIV, through laws, which make it and its medication different from other pandemics. This exceptionalism, and in some instances the history of the pandemic, impact self – presentation in professional spaces and social roles (Manderson and Smith-Morris 2010, Flowers 2010:117).

Nonetheless, identity derived from biomedicine appears problematic and compromising. Grouping HIV positive individuals based on their medical reliance may not promote societal singularity but can deepen the fragmentation of populations based on biopolitics within nations (Sabina 2013, Nguyen 2010, Parker 2005). This has led to scholars, like Ecks (2006), claim that political [medical] pluralism: the presence of two or more peoples with the same [chronic health] condition, is a recipe for either social stigmatisation or the biomedically determined formation of groups. It is possible that people who suffer from certain illnesses are often given certain special opportunities, privileges, socially as well as politically excluded or included. Consolidation of identity founded on biological traits – for instance, sickle cell anemia, sickle cell trait, or Tay-Sachs disease - and medicinal needs – such as those around HIV, diabetes, or heart disease - can be useful for (re)distribution of available resources into and within the health sector, and as grounds for claims for these and other resources (Rose and Novas 2005).

While chronic conditions do re-establish new forms of belonging through identity, it is a more often the case that long-lasting illness weakens social networks and interrupts relationships over time (Pallesen 2014:237). Foucault's work, on for example sexuality and governmentality, has inspired many identity movements. However, he was critical of the concept of fixed identities and its promotion, calling rather for the dissolution of identity because of the subjugations and power relations in play over and between different others (Bulley 2014). Contrary to Foucault's support of elastic identities in response to, for instance, medicalisation, identity in biopolitics is significant for, in the first place, recognition, integration and participation in public life. Because being on ART is and can be used as criterion for the struggle of acknowledgement, inclusion and respect for those living an HIV positive life like teachers in school.

Though identity theory is significant for understanding human action and their spaces of relationships, it seems flawed in determining the extent which subjectively felt and not enacted identities can manifest themselves in medical discourses. As a concept, it mainly looks at self-image construction processes that are influenced by external entities, leaving out internal ambivalent identities, such as those with troubled HIV status adaptation. Individuals may at times deliberately process and evaluate self-relevant information before forming commitments and defining themselves, whereas sometimes they adopt and internalize the normative prescriptions of those around them and their cultures (Berzonsky 2011). The accommodation of a medically determined identity is in itself drawn from individual physical and psychosocial histories of the impact of medicalization over time. Indeed, in self-determination theory (Guardia 2009), it is argued that identity-relevant obligations are controlled by natural factors such as bodily incapacitation due to illness, an idea that is consistent when applied in the context of teachers who are on ART in Zambia. Their personal health and illness trajectories from diagnosis to treatment is key in forming the grounds of their HIV status identities coupled with socially determined norms of being positive. Living a medicalised life, such as being on ART, is highly governmentalised thus confronts old identities, as it requires both expert knowledge and the formulation and implementation of

intervention routines for a healthy life (Wahlberg and Rose 2015). Moreover, many other identity constructions – related to gender, generation, age, religion, and class, for example – intersect with the HIV medical identities, biopolitically and perhaps, outside of governmentality also.

The idea of identity construction for HIV positive people has cause and effects links to the governance of medical regimes and interactions. It is the interface between the social and medical which is crucial in understanding the agency upon which medical images of HIV are crafted in social spaces, like the work place of a school for teachers. In this view, the conduct of medical practitioners and services users in managing an illness' positive identity that fits into social structures is testament to how ART has been normalized by biomedical constitutions. This therefore overshadows some psychosocial issues in the governmentality of health and illness in the treatment age, which is the focus of the next section.

### *Governmentality: A Foucauldian approach to understanding life on ART*

Foucault's perspective of government is embedded in his notion of governmentality. He defines governmentality as constituting of a variety of techniques that encompass political government, forms of self-regulation (technologies of the self) or the 'conduct of conduct.' Emphasis on 'conduct' implies 'regulation of behaviours' (Bulley 2014:1; Burchell et al. 1991). The phrase 'conduct of conduct' implies understanding of how 'subjects' are made and 'power' is exercised by individuals and groups through a given culture. In relation to HIV/AIDS in Zambia, the appointment of focal persons in districts, provinces, and schools in addition to other HIV projects endorsed and supported by the ministry of education is in itself creating a health education culture and governance model in the sector. The ministry of education in Zambia has also introduced HIV/AIDS topics in various curricula, promoted creation of clubs for learners and series of HIV workshops for teachers.

The occupation HIV risk of teachers led the ministry of education in Zambia to develop its own AIDS work policies in schools (Bennell 2003). This institutionalisation of an illness such as HIV is similar to having a constitution that governs actions and behaviours of a given population. More and more positive teachers are now engaged in the HIV school community by sharing their experiences even becoming activists through 'technologies of the self' (Foucault 2008) of living with HIV and on ART while performing their roles. Thus, through confession – disclosure – technologies they become respected participants of the broad HIV community in and outside their schools. Zambian schools' administrators appear to be consciously, though slowly, making their school communities as safe havens with reduced risk behaviours and reduce stigma for teachers as well as learners who are receiving HIV medication (Kelly 2000; World Bank 2009).

Foucault introduced the term medicalisation with reference to politically charged medical interventions during the 18<sup>th</sup> century. He argued that human existence, behaviour and body were brought into an increasingly dense and important network of medicalisation that allowed fewer and fewer things to escape (Foucault 2008). Contemporarily and with the upsurge of chronic conditions worldwide as health care has become more accessible and lifespans have increased, (De-Graft et al. 2010) health has increasingly become more of an individual responsibility than a public issue, especially with privatization on the back of structural adjustments. This move brings us to what Foucault called technologies of the self – in this case, extensions of medicalization that place the biomedical governance of the body increasingly in the realm of self-care. Foucault considers

medicine as a culture which has its own body of knowledge, and as a way of knowing that has evolved in conjunction with technology and in isolation with sociopolitical norms of affected individuals and groups (Tiefer 1996; Foucault 2008, Squire 2013). Foucault's work broadens our understanding of 'subjectification'; a concept that takes individuals as co-authors (with external influences) of their own identities even in the course of medicalisation. Foucault extended his ideas of medicalisation by arguing that the process of subjection is a negative force through which individuals are made subjects against their will – like taking medicine on a daily basis. This constitutes the various versions of the social and natural worlds which are fundamental to identity construction (Foucault 2008).

The consequences of disease for the collective and individual are diverse. Governmentality here is about exploring the diverse ways in which people (teachers inclusive) on curative treatment (and others) feel and are controlled – disciplined, not only within and around a 'medicalising' clinical encounter, but also in perceived expectations from their own social milieu such as those of a school. Foucault's concept of governmentality has advantages in theoretical terms of understanding how HIV positive teachers in Zambia manage themselves and are governed by school rules. The concept typically reveals indirect as well as direct medical and other techniques by the state, civil society and medical practitioners for leading and controlling individuals without being responsible for any unexpected outcomes of HIV medicalisation technologies. It is through these wide ranging and often invisibilised techniques that the treatment of HIV is done. There is an increasing tendency to portray social and psychological phenomena as normal medical problems (Nye, 2003). This is due to the fact that medical governance [is one form of the naturalization of HIV that] is now shifting responsibility, for citizens' health, in nations from the state into the domain of individual self-management and sufficiency (Squire, 2010; 2013). At the same time, governments operate powerfully medicalizing governance at the national policy level. The HIV work policy for teachers in Zambian schools, developed in 2005, is an example of state-intervention on health matters affecting individuals but has the potential of disrupting activities at a larger scale (Ministry of Education 2012).

Foucault's theory of governmentality has not remained unchallenged. It is criticised for attempting to hold a discussion at once on too much and ending up with too little (Lemke 2001). The theory seems flawed in its attempt to identify 'core characteristics' of modern medicine in a reductionist approach similar to the very health issues it seeks to interrogate (Bulley 2014). Additionally, his approach can be criticised for being too euro and ethno -centric. However, patterns of conduct and self-regulation techniques in Foucault's theorisation of technologies of the self in relation to medicalisation can be universally applied and grasped clearly by relationally thinking of governmentality and chronicity.

In spite of the noted weaknesses, Foucault's governmentality theory uncovers the subtle obligatory duty to rules that are supposed to be for the public good, rather than individual wellbeing. For example, teachers who are on ART are required to teach even if their medical review appointments clash with their class-timetable. Thus, temporality issues in relation to the Foucauldian reconfiguration of power and time invested in governing health burdens of chronic conditions can best be described by looking at the concept of chronicity that is discussed in the section below.

### *Chronicity: The time, social and management factor in HIV as a chronic condition*

The prominence of chronic health conditions in nations is a global concern because they pose serious health, economic, social, and political challenges for individuals, households, communities, and nations (Olmen, 2011). In the global south, especially Zambia, the HIV pandemic's chronic nature will continue to change the macro and micro socio-economic structures as those affected and infected by HIV cope with the conditions (Calvin, 2011). Chronic illnesses such HIV, has been so imbued in global structures and international geopolitics have gone through significant changes that are reducing bodily incapacitation and death around the world (Cooper et al. 2013; Yach et al. 2004; WHO 2015:20).

Furthermore, Manderson and Smith-Morris (2010) argued that there are four areas of life that are affected by lifelong medicalisation. These are systemic poverty, interpersonal relationships, management of biological and epidemiological phenomena and subjective time experiences. The above aspects are interwoven within three key elements of chronicity. These are disease or health management techniques large and small scale, social phenomena and time (Colvin 2011).

While HIV can be broadly categorized as a chronic disease, its complex prevention and treatment needs make it unique from other chronic health conditions (Colvin 2011:4). First, to the above itemised elements, is the management of disease for a health life. The idea of chronicity expands understanding of 'disease' time verses 'illness' time and how these blurred categories of time are managed and have different effects largely due to medicalisation. Illness is more of an 'experience' than disease which can be determined by biomedical methods, ranging from clinical observation to physiological testing and culturing. Illness depends on phenomenological examination of personally experienced distress (Curtin and Lubkin 1995).

To manage HIV in terms of chronicity is to stabilize a person's condition that can be diseased yet not ill – as with certain types of cancer, or indeed with HIV, where the temporality of being HIV positive and becoming more and more immunologically compromised does not relate consistently to the temporality of experienced HIV illnesses.

The focus of managing chronic epidemics appear more biomedical than medico-social through such techniques as rehabilitation, prevention, palliation, risk constraint and even rights to be supported. The practices for sustaining a healthy life whilst living under medication for a chronic condition, as shown in De-Graft et al (2010), have had special effects in modifying: a) many chronic conditions whose management changes meanings of the 'biological', appear less socially contextualised and b) HIV's strong socio-cultural embedding foregrounds how its management over time changes 'biological' categories. HIV's management is highly and increasingly biomedical – and successful – and that seems to reduce its biological determinism, as with other chronic conditions.

However, HIV is in addition highly socio-culturally contextualised because of how it is transmitted and because of its epidemiological patterns that requires, reorganising and integrating health services, self-management and behavioural changes. For instance, within contemporary debates on HIV, it is often argued that the emergence of PrEP, the availability and access to ART, medicalised prevention and transmission programs, and the creation of activist lobby groups – around treatment – is changing meanings and the scale of being HIV positive and negative (Whyte et al

2014). With medicalisation, the number of survivors who need complex treatment and medical care increases in long – term treatment successes.

The HIV – biomedicine relationship is unique from that around conventional treatment of chronic illness such as diabetes or heart disease because it requires a certain level of acquiring medical knowledge and social skills for a healthy life (Yasin 2012). Most Zambian teachers work in social spaces thus are subjects of policies, interventions and information that alter social behaviours in the management of schools (Kelly 2000; Mulubale, forthcoming). This implies that the success of being on ART for Zambian HIV positive teachers, is determined by resources and local contexts of policymaking around health which can influence how individuals are able self- manage their chronic disease effectively.

The second area of chronicity involves ‘social’ factors. Studies have shown that the social support base for people living with a chronic health condition determines the level of treatment effectiveness (Squire 2010). Social support and the lack of it thereof for a range of chronic illnesses – such as cancer and depression – is linked to high mortality and chronic illness treatment withdraws (Yasin et al. 2012:4). Similarly, Good et al. (2010) argued that the health of patients improves when they receive functional support, like that from family. Though self-management is key, society has a bearing on the process of patients’ self-determination and commitment to wellbeing (Emson 1987, Institute of Medicine, 1991; Curtin and Lubkin 1995). In Zambia, it seems teachers’ access to biomedical and social technologies relies on their social status of life. Government employees – teachers included – who live ‘normal’ lives whilst on ART are those whose chronicity has been accepted by their social networks and are receiving both functional and structural social support through companionships, peer groups formation and informational links (Whyte et al. 2014). Help in the medicalisation process ranges from encouraging one to test and motivating them to get on a treatment program. In Uganda, for instance, the sociality that kept the infected populations resilient even in sickness and long-lasting treatment was the support of kinship, friendship and partnership ties (Rabinow 1996; Whyte 2012). Similarly, teachers living with HIV in Zambia seek to be socially accepted and sometimes conceal their HIV status due to stigma and absence of standard social security and occupationally-related incentives of medicalization through ART (Kelly 1999).

And the third area of chronicity relates to time. Adjusting to bodily limits, disruptions and medication routines under HIV treatment is something learned over time. Time plays a significant role in shaping biomedical practices and it defines patients’ everyday life experiences away from clinical encounters (Whyte 2012). Chronic illnesses, such as HIV among teachers in Zambia, require the ability to adapt to changes of illness longevity and the passion of thriving whilst individually managing and negotiating different identities foisted by the disease and its subsequent treatment (Kelly 2000). Within the chronicity perspective, lie the idea that any disabling conditions such as alcoholism and related long-term health or even addiction illnesses can lead to living modified life-styles (Manderson and Smith-Morris, 2010).

From the discussion above, each domain of chronicity appears interrelated. This is because ripples of chronicity range from social isolation or integration, physiological or psychological limitations, independence, or dependence, enforced or forged self-images and modifications of identities, to economic pressures and the episodic fear of death among sufferers (Levy 1979 in Curtin and Lubkin 1995). The changes in an individual’s life due to medication are shaped by means of coming terms with one’s past, present and future health conditions. And how they make the links between changing life and chronic condition is facilitated by seeing life in temporality terms of adaptation

and self-conduct. There is no certainty of continued health stability in living with a chronic condition. Also a person's social clock is disrupted by the unexpected experiences of an illness (Bury and Holme 1991) which topples life prospects at any stage. Mostly, then, chronic conditions have less to do with the past and the projected future than the present. Mead (1932) in Collyer (2015) through his theory of 'temporality' argues that time and history have no impact on long-term chronic health issues. He argues that chronic conditions are timeless bound due to focus of the 'present' on infected and affected person. Because living with a chronic disease is emphasized by experiencing and embracing the 'present identity' that is either imagined or forfeited. Self-construction in chronicity is based on existing reality that is in the now – the present; this implies that *time* – past and future – are at some points irrelevant in health and illness.

Though the conceptualization of chronicity above appears relevant in deducing the trajectories that are reshaping and normalizing HIV in recent past, the concept is not devoid of problematic connotations in current scholarship. The prevailing chronicity narrative points to a panoramic view of chronic diseases as manageable, lifelong and invisibility of acute illness and body incapacitation. The above traditional view of chronicity does not help in fully describing life on ART for HIV positive individuals. The uncertainty tied to life on ART and the social expectation of invisibility of chronic conditions can be basis for stigma in HIV medicalization. Temporality effects in biomedicine is homogeneous and linear, thus medical narratives of chronicity appear problematic and inaccurate as social dimensions are often unaccounted. The understanding of a chronic illness such as a HIV is not only an individual account of experiences but also takes into account effects of collective actions and interpretations of living with an incurable disease and medicalised life.

The concept of chronicity can be flawed if used in low level analysis and short-term perspective of HIV medicalisation. Therefore, the theory ought to be contextualised in relation to long-term biomedical conditions that are without visible signs of being acute. New ways of understanding chronicity must be inspired by the medicalisation of invisible, non-physical disorders and life-long conditions such as HIV's contemporary phase of ART.

In the following section, an attempt is made to conceptualise 'HIV citizenship' in its new therapeutic context, in a way that also recognises the concepts discussed above.

### *Therapeutic citizenship: Its conceptualisation and interconnections*

The work of Vinh-Kim Nguyen on people living with HIV and humanitarian efforts in fighting the scourge made the concept of 'therapeutic citizenship' prominent in the HIV field (Nguyen 2008; 2010). Through his 1990s research in West Africa, Nguyen reveals the extent to which AIDS transformed into a global industry enmeshed within the development sector leading to humanitarian projects, on effective treatment, that appear to have birthed new forms of life subjectivities such as AIDS activism, creation of support groups and subjects governed by the demands of particular regimes of treatment: Therapeutic citizens. Most positive individuals in Nguyen's (2010) sample had no access to ART drugs and appealed more to donors than to the state, given that donors predominantly funded treatment at that time. Although it was not most HIV positive individuals in his sample who sought for international assistance, their discourse appears to have had relevance to donors and such a global platform. This was done through what he calls 'confessional technologies', personal stories of disclosure and living with HIV. At the same time, it appears that his participants were regulated in their discourses and practices by the

requirements of ART treatment to be regularly measurable, to adhere to treatment, and in addition, to be disclosing members of an 'out' HIV community.

The notion of therapeutic citizenship highlights notions of inclusions and exclusions of the infected and affected. Through citizenship that is medically determined, but also variably socioculturally shaped, one can gain access to resources and enjoy rights that other national citizens with other forms of chronic illness like diabetes, high blood pressure and more, may otherwise not be entitled to. In this HIV case, positive people have access to free drugs and in some instances in Zambia, for instance they receive food stamps, and sponsorship to attain an education as well as empowerment funds (Mweemba et al. 2010; Siameja 2011). At the same time, gender, class, ethnicity and 'race' also stratify HIV citizenship itself: Access to HIV-related resources are inflected by such power relations. As before, this form of citizenship continues, too, to support a governmentality of 'solutions' by providing easily identifiable human subjects since infected people are put under medical surveillance. However, most scholarly works cited in this paper such as Nguyen 2008, 2010; Mweemba et al 2010 and Whyte 2012 tend to focus on narrow conceptualisations of therapeutic citizenship, looking more at biomedical implications of medicalisation than at social dimensions within political and cultural spaces of identity and belonging – partly because, as mentioned above, they derive from earlier periods in the pandemic. They also address highly specific country contexts. The prevailing situation, perhaps best summarised through the 90-90-90 goals or more modestly, in the Zambian case, widespread ART access and efficacy, as well as country-specific histories and conditions, mean that the notion of therapeutic citizenship needs to be readdressed. For example, Nguyen's conceptualisation of relations of therapeutic citizenship was meant for a particular era and geographical area. Today, it appears minimalist as it focuses on access to medicine and difficulty of treatment access alone. However, disclosure, treatment education and adherence as technique in current discourses and practices of HIV treatment continues to create a membership base, a citizenship, at both global and national levels (Paparini and Rhodes 2016:505). The concept of 'therapeutic citizenship' indeed involves the broader social, political, economic and cultural implications of stratifying citizens on the basis of discourses and practices of biomedicine and biopower, beyond the field of HIV.

In the present HIV field, individual biopolitical claims are recognised and respected on the basis of shared biological conditions understood through biomedicine. Under extended conceptions of 'therapeutic citizenship' applied here to HIV/AIDS and drawing on later work on therapeutic citizenship (Paparini and Rhodes 2016; Patterson 2015; Whytes 2015), biological characteristics, as they are socially mapped and acted on, matter both subjectively and socially. For the relationship between therapeutic and biological citizenship is twofold: individualising and collectivising. It is individual because it focuses on the body and personal strategies of managing illness. It is collectivising because it acts as a conduit to establishing communities, group engagement with the social context, and broader civic participation and activism. For example, 'therapeutic citizenship' among HIV positive teachers in Zambia, the topic of my upcoming research, could involve such issues as support for treatment that sustains individual and collective identities through hope symbols and activism and that manifests itself in social spheres and biomedical arenas (Rose & Novas, 2005:5). The social relations of care activities undertaken on the basis of HIV diagnosis and treatment are bringing people living with HIV closer to both the state and communities (Kyakuwa 2009 cited in Whyte 2012). Teachers in Zambia may then come to recognise and connect with the government through its programmes of free access to testing and treatment, and with local communities defined through being HIV positive or HIV affected. 'Therapeutic citizenship' is clearly about both solidarity and the contestation of power brokering relations as seen in relations from the interpersonal to those of nation-states relationships, and it has to include attention to



socioeconomic inequalities prevailing among citizens in most countries as well as between countries and regions (Ratele 2016).

How does the picture of HIV developed earlier in this paper, and current today, fit with the concept of therapeutic citizenship? First of all, HIV is increasingly seen as a chronic condition due to the availability of and access to effective early; long-term treatment, and side effect management, although one's relations to the condition may change over time (De-Graft et al. 2010). This chronicity means that therapeutic citizenship is now framed in relation to HIV as chronic illness, as enduring, mobile – and sometimes, medically 'failing' – rather than as a response to difficult to access, rationed, life-saving treatment in the context of widespread HIV fatality, as with Nguyen's earlier work. Second, the ongoing role of support groups both to serve and to appropriate HIV's medicalization, continues to operate as a politics that turns individual conduct into citizenly action, as in Nguyen's first work. However, HIV's increasing biomedicalization, as treatment-driven approaches to the epidemic become more hegemonic technologies of governance, means that there is less space for such groups to articulate their own health citizenship, as happened with for instance South Africa's Treatment Action Campaign (Robins, 2008) or indeed in Nguyen's research contexts. Third, even as a chronic health condition, HIV identities remain characterized by internal and external stigma, and HIV identities also continue to be strongly linked to cultural and social factors, for instance, race, religion, gender, and socio-economic status. Therapeutic citizenship is thus recognised now as not reducible to stigma-governed or stigma-resistant identities, as in Nguyen's typology. Stigmatisation and destigmatisation (Campbell et al, 2006) are now woven into all its identity forms, and cultural and social variabilities in identity play much more of a role in ongoing HIV lives.

Moreover, therapeutic citizenship in relation to this continuing, long-wave condition needs to be conceptualised in terms of ongoing issues of employment and of resource availability for PLWHIVs and for communities and countries addressing the pandemic – governance issues largely irrelevant to Nguyen's original conceptualisation (Squire 2013; Whiteside 2016). Even more widely, therapeutic citizenship in general, and for specific groups such as Zambian teachers, my research focus, is now framed by global and national political, policy and media technologies of governmentality, as well as governmental social relations at all levels, from the interpersonal to those of civil society (Whyte 2012), all of which position HIV not as a potentially fatal emergency, as with Nguyen's first research, but as a chronic, pre-eminently medical, and largely solved problem.

The on-going practise of therapeutic citizenship, this paper argues, takes its shape from HIV's current chronicity; its implications with HIV identity, itself inflected by the new status of HIV as a chronic condition; and the increasingly biomedicalised governmentality of the HIV field. This complexity generates potentially disruptive and perhaps also reconstructive effects of living with HIV and antiretroviral therapy today, for those who are HIV positive or affected by HIV – effects that appear within the constraints and possibilities of contemporary HIV 'therapeutic citizenship' (Murray 2007). Therapeutic citizenship as a concept thus allows us to think, through identity, chronicity and governmentality, about large structures of political, economic and sociocultural practice around HIV, as well as about how individuals with chronic conditions forge new forms of resilience, resistance, acceptance and belief about their illness and its subsequent treatment effectiveness (Squire, 2007).

Given the contemporary complexities just described, therapeutic citizenship can generate both benefits and limitations in citizens' public and private lives. For instance, there is increasing medical,

cultural and social understanding of living with HIV. Yet, stigma isolation and bodily limitations, even fatality, are also associated with being HIV citizenized. Again, discourses and practices for people living with the virus are intertwined with not only an HIV positive identity which continues frequently to involve stigmatization, but with positive forms of self-image associated with, for instance, the professional identity of being a teacher. Moreover, claims made and privileges enjoyed based on being HIV positive seem in some circumstances to interact intersectionally with, but in other circumstances to outweigh, entitlements claimed on the basis of poverty, gender, race, ethnicity and other forms of injustices that are identity driven (Nguyen 2008:143; Patterson 2015); or entitlements claimed on the basis of biomedically based citizenships related to other illnesses. Such potential economic or resource conflict can create categories of ‘citizens among citizens’ among biopoliticised populations and populations framed in terms of identarian social justice, within the same national state and even on the global level (Squire 2013:90 - 104). For instance, since most HIV treatment is externally funded in low-income countries like Zambia, international donors tend to shape therapeutic citizenship – for example, by focusing, contemporarily, on young women as those most needing to become ‘HIV citizens’, whether they are of positive or negative status (UNAIDS, 2017). Similarly, donor provisions are creating global grouping of populations which are pacifist through clinics and universal ‘projectification’ of HIV/AIDS (Patterson 2015: 2). Another example: international and national patterns of manufacturing, procuring and distributing ART continue to constitute HIV positive citizens in all countries – but especially in low-income countries with least ability to fund ART - as precarious subjects of international health policy, national health departments, and brand and generic pharmaceutical company strategies.

With the above in mind, therapeutic citizenship can be linked to political citizenship. How aspects of citizenship like; national identities, responsibilities, rights, obligations and entitlements are reformed and understood among medically reliant individuals to be active citizens, exacerbates the need to extend notions of ‘therapeutic citizenship’ to capture political aspects of citizenship such as rights (Steenbergen 1994:2). HIV patients, at least in Zambia, do not often act and mobilise on their right to health – embedded within political citizenship – hence likely not to place health related demands on the state. Teachers as therapeutic citizens in Zambia appear not to recognise the social contract they politically have with the state as the role of the state is invisible since demands are placed on non-state actors such as donors or pharmaceuticals (Whyte 2012; Patterson 2015). HIV advocacy has somehow taken a much broader approach resulting to such notions as para-state: which implies an absence of full ideological state apparatus in health matters especially in non-developed nations like Zambia (Mbali 2013). Today, in most liberal political customs, health politicking has nurtured citizenship stratification between those who are living with and without HIV (Squire, 2016). The biopolitics of HIV has allowed people to offer solidarity and to identify themselves with each other based on shared experiences (Patterson 2015:3) just like other citizenship aspects that held in commonality within and between countries.

Therapeutic citizenship here is conceived as relationally shaping understanding on the politics of HIV and perhaps other chronic conditions in this treatment era. HIV has transformed societies; it is a global issue with long-term health implications tied to taking medicine, every day and on time, for life – a continuity of biomedical care shared with other widespread chronic conditions (Paparini and Rhodes 2016). How such citizenship, here, in the HIV case, affects populations that are key for development activities, such as teachers, needs a great deal more empirical investigation. Therefore, the reviewed theoretical issues above provide a diverse and modern context of therapeutic citizenship. The repurposing of therapeutic citizenship may in future require involvement of concepts of ‘ubuntu’ and ‘decoloniality’ in Zambia. Ubuntu is brought into the picture because it draws on personhood, humaneness, and morality, it is a humanistic orientation

towards fellow beings in that it envelops key values of group solidarity, compassion, respect and human dignity (Ratele, 2016). Whereas decoloniality is useful in our time of framing therapeutic citizenship due to rising concerns to (de)globalise the production of knowledge and our social discourse outside western domains by utilising other disciplines (Masing, 2018), especially in this medicalisation and normalisation context.

## *Conclusion*

This article has discussed the extent to which the medicalisation of HIV positive teachers in Zambia can possibly create forms of ‘therapeutic citizenship’. The paper has also shown how HIV fits into the therapeutic citizenship picture beyond just treatment to encompass broad issues that are economic, social, political, cultural even biomedical and psychological. The preceding sections have explored how the governmentality of this disease, turned chronic, involves an identity that is bio-social and bio-political, an outward manifestation through conduct of an inward emotionality. It has been argued here that being HIV positive and on ART can change the image and role of teachers in development.

Through some of new theoretical insights highlighted in this article, it can be ascertained that use of ART is directly and indirectly changing knowledge (or understanding) of the HIV pandemic. This change in Zambia means that HIV is now a chronic illness that seem to be creating a form of ‘therapeutic citizenship’. Key populations, such as teachers’ well-being, sickness and, medication go beyond individuals and their families affect whole societies and their institutions and has broad national development implications (Bennell and Kwame 2007). Thus, the role of HIV positive teachers in Zambia’s development can be mediated by those who particularly may view and experience their therapeutic citizenship more positively.

Additionally, and from the foregoing discussion, it can be noted that living a life mediated by medicine can create positive, healthy, active therapeutic citizens; but the overlooked difficulties of such citizenship can also leave individuals, in positions of uncertainty, despair and periodic disruptions of self-efficacy. HIV is a fading tragedy due to the possibility of the effective treatment that has drastically reduced mortality in Zambia. The HIV disease has been transformed into more of a chronic condition and less of an acute illness, yet still with major implications for many aspects of human life. Going forward, social science research in this area needs to pay attention to concerns around biomedical ‘objectivity’, ethics and the changing role of the state in governing medicalised populations. There is also a need to further extend the biomedical conceptualisation of ‘therapeutic citizenship’ to capture its biopolitical and biosocial implications.

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# Passionate leadership in organizations (PLIO)

Sok-ho Trinh

## *Abstract*

The aims of this literature review are to firstly unpack the definition and components of the concept of passionate leadership, and to assess whether it differs from passion in other contexts. From this a second aim will be to critically review the extant literature of passionate leadership, and to assess where gaps may be present. Thirdly it is anticipated that this will generate several research avenues and questions in need of exploration so as passionate leadership in organizations (PLIO) can be further understood.

Researchers and academics from various sectors call for a more “effective, inclusive and legitimate forms of global leadership” (e.g., Gill, 2011). Indeed others such as Gandolfi and Stone (2016) even go so far as to suggest a global leadership crisis.

In response to this, PLIO addresses this global need of a new form of leadership identified as a way of life focused on bettering the world.

## *Introduction*

Recent research in the field of leadership and well-being have led to a renewed interest in exploring forms of leadership which contribute to a better world (Grenville, 2017). Organizational leaders are confronted with unparalleled complexity (Youssef and Luthans, 2012), and others warn against a global leadership crisis (Gill, 2011).

As a response to this crisis, an increasing number of researchers have investigated the correlates between leadership style, employees’ well-being and concomitant impact on business outcomes (Keyes, Hysom and Lupo, 2000). The result of this has been for organizations to not only look at success based on the profit and revenue, but to also shift towards the wellbeing of their staff (De Cuyper, Van der Heijden and De Witte, 2011) and to build a leadership for a better world (Komives and Wagner, 2015).

Research indicate the contribution of employees’ well-being to the organization’s success measured in terms of performance-related outcomes (Cotton and Hart, 2003; (Alimo-Metcalfe *et*

al., 2008). The importance of employee wellbeing to organizational success, and the role of passion as part of wellbeing is now beginning to be explored (Philippe, Vallerand and Lavigne, 2009), (Vallerand, 2012b).

Research on the concept and construct of passion at work also identified as Work passion (WP) and Job passion show evidence that employees perform better (Ho, Wong and Lee, 2011) when harmoniously passionate. Harmonious passion (HP) being defined as an autonomous internalization that leads individuals to choose to engage in the activity that they like and HP promotes healthy adaptation (Vallerand et al., 2003).

Zigarmi (2009) defines WP as “an individual’s persistent, emotionally positive, meaning-based, state of well-being, stemming from reoccurring cognitive and affective appraisals of various job and organizational situations that result in consistent, constructive, work intentions and behaviors” (Zigarmi et al., 2009) pointing its contribution to the state of wellbeing. A correlation between a leader's work passion and an employee's work passion has also been established (Li, Zhang and Yang, 2017) (Smith, 2018), with evidence suggesting that a leader's work passion is transferred to employees through emotional contagion (Li, Zhang and Yang, 2017).

Business practitioners’ publications posit that being a passionate leader is key for an organization’s success (Rosengarten; Bruce, 2010). To provide evidence of the interest of practitioners for passionate leadership, several references<sup>2</sup> are provided.

However, conducting a literature review upon “passionate leadership”, only one paper of academic rigor is found. Research on EBSCO as of June 2018). This paper (Davies and Brighthouse, 2008) looks at passionate leadership in Education and so it can be concluded that with regards business and organizations that there is a lack of knowledge in this area. passionate leadership is described by Davies and Brighthouse as “a passion to change things for the better, a passion with a moral foundation”. Aligned with the virtuous quality of passionate leadership, contemporary scholars express their concerns to conceive a new form of leadership to contribute to a better world, (Grenville, 2017).

Further literature searches (e.g., academic database EBSCO, Scopus, Science Direct and Google Scholar, June 2018) indicate a similar lack of scientific literature which examine the concept of passionate leadership in an organizational setting (0 result on the academic database as of June 2018). Similarly, there is no empirical research exploring wellbeing and the work outcomes of passionate leadership on the leaders themselves and their followers (0 result on the academic database as of June 2018).

<sup>2</sup><https://www.forbes.com/sites/ellevate/2015/07/08/the-art-of-passionate-leadership/#2ec7a10f4484>  
<https://www.inc.com/peter-economy/10-powerful-habits-of-highly-effective-leaders.html>  
<https://www.theordinaryleader.com/why-passionate-leadership-matters/>  
<https://www.businessnewsdaily.com/9489-leadership-lessons-tom-lindberg.html>  
<https://leadonpurposeblog.com/2013/07/06/are-you-a-passionate-leader/>  
<http://danblackonleadership.info/archives/1273>  
<http://www.businessinsider.com/ceo-explains-why-passion-is-key-to-success-2014-5?IR=T>  
[https://generalleadership.com/passionate\\_leadership/](https://generalleadership.com/passionate_leadership/)  
<https://www.inc.com/peter-economy/the-5-essential-qualities-of-a-great-leader.html>  
<https://www.michelleray.com/passionate-leadership-12-key-traits-that-distinguish-the-best-from-the-rest/>

To avoid confusion, the term passionate leadership In organizations” (PLIO) will be used to refer to passionate leadership in an organizational and Business environments (Meinhardt, Junge and Weiss, 2018) and to differentiate it between passionate leadership in other settings. (Davies and Brighouse, 2010).

The proposed research will therefore aim to build the foundations for future investigations on PLIO by exploring this under researched area. It is believed that this will be of valuable for both practitioners and scholars who have an interest in positive psychology, organization development, leadership development, human resource management, among other disciplines.

### *Defining passion*

Attempting to define the concept of passion is not an easy task (Vallerand, 2015). This is hardly surprising as the topic of passion has interested philosophers for several millennia (Rony, 1990). Vallerand in his book dedicated an entire chapter to the history and definition of passion according to philosophers (Vallerand, 2015).

The etymology of the word *passion* (from the latin "passio" for suffering) motivated many philosophers to look into the concept to further investigate the assumed negative impact which is connoted by the work suffering (Miller, 2012).

In ancient Greek time, passion was described as conceded by the gods which implies the idea that a person has no control neither on its original nor on its development (Vallerand, 2015).

This was supported by Greek philosophers Solon, Thales, who described passion as “a dysregulated form of energy” (Vallerand, 2015), which “entails a form of passivity as outside of one’s control” (Vallerand, 2015).

Passion then became a term with religious connotations, in particular in Christianity as preached by Saint Augustine in the 4<sup>th</sup> century who voiced the importance of controlling one’s passion using god’s granted free will (Hecht, 2014) (Roach, 2008) (Vallerand, 2015). Although much later, Aquinas in the 13<sup>th</sup> century, argued that passion can be also good provided that it can be controlled (Miller, 2012).

**Descartes**, the 17<sup>th</sup> century French philosopher, rooted his view of the world in certainty, grounded in what is now called a “Cartesian method”. To him, emotion, such as passion, arose from two sources, the intellect and the body (**passions** of the **Soul** and **passions** of the Body) (Albuquerque, Deshauer and Grof, 2003). In this same publication Descartes described how **passions** of the **Soul** were observed as problematic emotions. It is worth noting that this dualistic model of passions has later been explored with a scientific approach, in psychology (Vallerand, 2010).

Beyond emotions, passion has also been opposed to reason by 17<sup>th</sup> century English thinker Thomas Hobbes in the. “passions are shown as the principle of movement in men, thought being at its service.” (Vargas and Verdejo, 2008).

This idea of passion leading to specific behaviour and physical connect is further supported by Scholastic and Cartesian philosophers from the 18<sup>th</sup> Century. They granted passion a kinetic

dimension of passion (Larllham, 2012). Recent philosophical publications seems to support the role of passion on the body movement indicating that passion offers a corporal judgement from a subjective point of view (Valls, 2011).

Passion has generated interest from many scholars for decades (Benedek, 1977) (Hatfield and Sprecher 1955-, 1986), generating numerous research on passion in relationships (Antar et al., 1997), (Marston et al., 1998), (Lemieux and Hale, 1999) and has received recent attention form the emerging field of positive psychology (Vallerand et al., 2003), (Vallerand and Verner-Filion, 2013). Passion has become a topic of interest, investigated mostly in human and social sciences. The following section will now explore i) passion for an activity, ii) the definition of passion, iii) measurement.

Although passion has been researched in correlation with love and in the context of a relationship several (positive) psychologists and social and behavioural scientists decided to investigate passion in relation to an activity producing a reasonably high number of empirical studies (Rousseau *et al.*, 2002), (Vallerand *et al.*, 2003), (Mageau and Vallerand, 2007), (Vallerand, 2010).

Passion was defined by Vallerand (2003) as a “strong inclination toward an activity that people like, that they find important, and in which they invest time and energy.”.

Two types of passion are proposed: Harmonious passion (HP) and Obsessive passion (OP) in a Dualistic Model of passion – DMP (Vallerand *et al.*, 2003)”. Under this definition, Vallerand constructed a useful comparison table which aims at dissociating the construct of passion based on Vallerand’s definition, versus other constructs which may be perceived as similar: try to describe what this shows or means not just cut and paste into your document.

Table below: passion compared to other constructs using the passion Definitional elements (Vallerand, 2015).

Passion Defining characteristics	Zest and Grit	Flow	Personal Interest	Personal, striving, personal projects, current concerns, and life tasks	Intrinsic motivation	Extrinsic motivation
1 Specific Object Love (or liking) of	No	Yes	Yes	Yes	Yes	Yes
2 the Object	No	No	No	No	Yes	No
3 Meaningful Object Motivational	Yes	No	Yes	Yes	No	For Some
4 construct Time, Energy,	Yes	No	No	For Some	Yes	Yes
5 persistence	Yes	Yes	Yes	Yes	Yes	Yes
6 Part of Identity	No	No	Yes	For Some	No	No
7 Duality of Passion	No	No	No	No	No	No

There is a growing interest of Practitioners for the concept of Work passion (WP) also called job passion and passion at work, in from professionals in Human Resources Development, leadership development, Coaching and other people-centric roles (Thibault-Landry et al., 2018).

The concept of Work passion is used by practitioners in the context of leadership where it is associated to emotions (Rosengarten et al, 2010), meaning and values (Malphurs; Audrey. 1996), leading to a work-life balance (Goldsmith, 2008) and connected to success (Rosengarten et al, 2010), (Venus, Stam and van Knippenberg, 2013).

Here is a list of websites and practitioners' publications which show evidence of this interests:

- Some<sup>3</sup> praise passion at Work, highlighting its importance and its benefits.
- Other<sup>4</sup> warn against certain malaptative outcomes of passion at work.

This increasing interest has paved the way to many research on passion at work, also found under the WP construct (Zigarmi et al., 2009), (Forest et al., 2011), (Ho, Wong and Lee, 2011), (Gagné et al., 2014), (Nimon and Zigarmi, 2011).

Zigarmi (2009) defines WP as an individual's continuous, emotionally positive, meaning-founded, state of well-being caused by repetitive cognitive and affective judgments of various job and organizational situations which leads to constant, constructive work intentions and behaviors (Zigarmi et al., 2009).

There is a considerable amount of research concerning entrepreneurship and passion (Chen, Yao and Kotha, 2009), (Chen, Liu and He, 2015), (Thorgren and Wincent, 2015). "entrepreneurial passion as an entrepreneur's intense affective state accompanied by cognitive and behavioral manifestations of high personal value" (Chen, Yao and Kotha, 2009).

In line with the self-defining component of Vallerand's definition of passion, a research found that entrepreneurial passion comprises strong positive feelings instigated by engagement in entrepreneurial activities and the significance of these activities for entrepreneurs' self-identity (Bao, Zhou and Chen, 2017).

Scholars also found that through this entrepreneurial passion "shared intense positive feelings for a collective and central team identity for new venture teams" can take place (Cardon, Post and Forster, 2017). Thorgren and Wincent (2015), use the Dualistic Model of passion developed by Vallerand (Vallerand, 2010) and warns that "the obsessive component is particularly evident among habitual entrepreneurs" (Thorgren and Wincent, 2015). Practitioners' publications which discuss entrepreneurial passion can also be found (Clover, 2009), (P. R. Newswire, 2014).

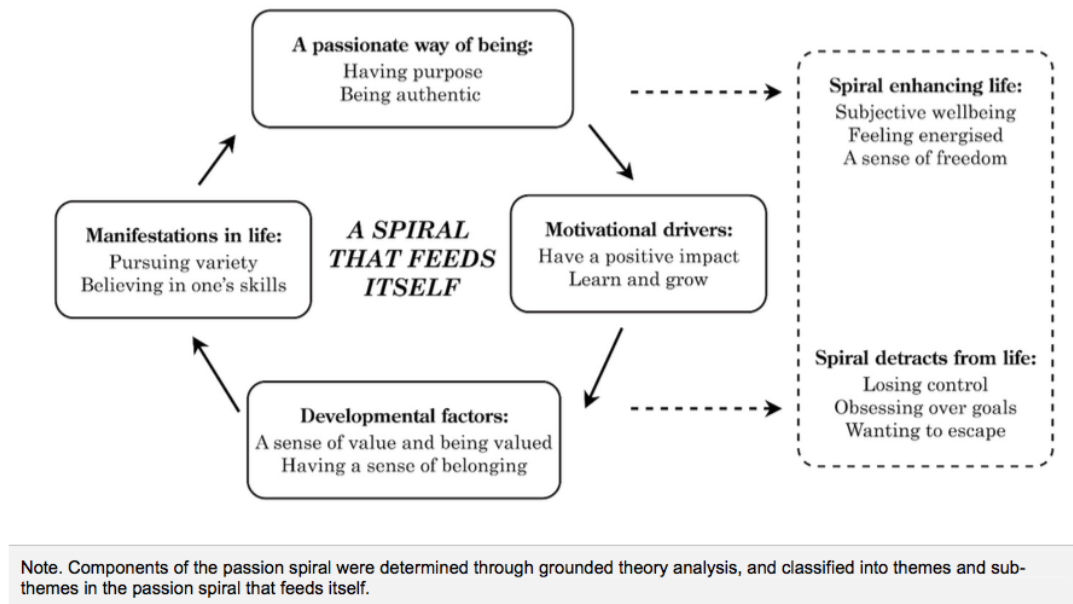
Most scholars examined the object of passion as an activity (Vallerand, 2010), (Lafrenière *et al.*, 2011), (Stenseng, Forest and Curran, 2015), work (Zigarmi *et al.*, 2009), (Forest *et al.*, 2011), or a person / relationship (Carbonneau and Vallerand, 2013), (Ng and Cheng, 2010). A recent research suggests that passion can be intrinsic to an individual in his/her way of being and is characterized by two components: having a purpose and being authentic. "passion is a way of being, or a quality, that the individual holds, rather than passion being a strong desire towards a

<sup>3</sup> <https://www.officevibe.com/blog/passion-work-important-engagement>  
<https://www.changeafactory.com.au/our-thinking/articles/what-is-passion-at-work/>  
<https://content.wisestep.com/passion-at-work/>  
<http://time.com/money/5107956/i-asked-5000-people-how-they-stay-passionate-at-work-heres-what-i-found/>  
<http://focus-1.com/passion-in-the-workplace.html>  
<https://www.theguardian.com/lifeandstyle/2018/apr/02/how-do-i-find-my-passion-work-sharmadean-reid>  
<https://www2.deloitte.com/insights/us/en/topics/talent/worker-passion-employee-behavior.html>

<sup>4</sup> <https://www.forbes.com/sites/work-in-progress/2017/06/28/lets-get-real-about-passion-at-work/#4020613c23b3>  
<https://www.inc.com/todd-nordstrom/how-passion-can-destroy-your-potential-according-to-5-experts.html>

specific activity” (Halonen and Lomas, 2014). In that same research, Halonen and Lomas identified the desire to have a positive impact, as one with the highest prevalence of all themes identified. Related to Vallerand’s research (2003), a passionate way of being can lead either to a sustainable subjective well-being, or to negative outcomes such as detracting from life and or loss of control. These findings are represented in a passionate way of being model (see illustration below) as described by Halonen and Lomas (2014).

Figure: components of the passion spiral



Although the passionate way of being model suggests prevalent themes following a grounded theory analysis (Halonen and Lomas, 2014), the sample analysed was randomly chosen from Ted talk speakers and do not apply specifically neither to Leaders nor to people in organizations which justifies one of the aim of this literature to assess whether passionate leadership differs from passion in other contexts. Prior to that, the definition of passionate leadership in organizations should be unpacked.

To pursue with the concept of a passionate state of being, when applied to leaders, a search on academic databases yields one main research published under a paper (Davies and Brighouse, 2010) and a book (Davies and Brighouse, 2008), on passionate leadership in Education (Davies and Brighouse, 2008). The publications gather a wide-range of authors: Brent Davies, Tim Brighouse, Brian Caldwell, Geoff Southworth, Andy Hargreaves, John MacBeath, Christopher Day, Alan Flinham, and John Novak.

The publications received several critiques (Roberts, 2009), (Eacott, 2009), (Oplatka, 2011) which confirms several themes identifiable in passionate leadership (in Education) :

- a. Involves emotions, emotional intelligence
- b. Establish a set of values and purposes
- c. Generate positive affects
- d. Is associated to successful leadership
- e. Is driven by social justice and moral purpose
- f. Driven by leaders' passion(s)



g. Generate admiration and delight in the followers

According to the authors, passionate leadership is about “energy, commitment, a belief that every child can learn and will learn, a concern with social justice and the optimism that we can make a difference.”, passionate leadership founds “a set of values and purposes that underpin the educational process in the school. Most significantly it is the individual passion and commitment of the leader that drives the values and purposes into reality.”

The authors therefore recognize that passionate leadership in education is not only focused on its cognitive and behavioral, observable aspects according to Day (Davies and Brighouse, 2008), but that it also contains emotional and moral qualities.

### *Measuring passion*

The concept of passion became a psychological construct when a systematic way to investigate the concept and when measurements of passion were introduced, tested, validated and therefore bringing a systematic way to understand passion (Cox III, 1987), (Dowding, 2013).

As described in section 2, passion as a (scientific and psychological) construct appeared in the early 2000's (Vallerand *et al.*, 2003). In his research, Vallerand proposed a way to measure passion, using a scale providing evidence of both its validity and its reliability (2003), including across languages and culture as set of questions may be interpreted in different cultures and languages (Vallerand, 2015), (Marsh *et al.*, 2013).

Based on a 14-items self-reported report, the passion scale has psychometric qualities and has been translated, tested and psychometrically validated in French, in Spanish, in Italian among other languages. That same scale has been adapted from measurement passion for activities to passion at work (Houlfort *et al.*, 2015), (Serrano-Fernández *et al.*, 2017), and for motivation and gambling (Rousseau *et al.*, 2002).

The scale and questionnaire allow practitioners and scholars to determine whether a person's passion for an activity is related to a harmonious (HP) or an obsessive (OP) character, and possible correlates between HP and OP are corroborated with other factors such as subjective wellbeing (Philippe, Vallerand and Lavigne, 2009), burnout (Kong and Ho, 2018), mindfulness (St-Louis *et al.*, 2018) which allows for a better understanding of the potential maladaptive or positive outcomes of passions on individuals.

However, what Vallerand and his teams have not measured is the concept passion as a way of life or a way of being, rather than passion being a strong desire towards a specific activity (Marsh *et al.*, 2013), (Halonen and Lomas, 2014). Very few research attempt to investigate the correlation between passion and personality with results that “show a pattern of relations between passion and personality” (Balon, Lecoq and Rimé, 2013) with limited contextual factors, hence “ These outcomes nevertheless remain weak (and with) more research needed” (Balon, Lecoq and Rimé, 2013). Scholars recognize the need to develop theories that are practical, often through the lenses of a company employees' engagement (Nimon and Zigarmi, 2011).

To understand the construct of passion, Vallerand (2003) investigated passion in a work setting and produced an original English version of the passion Toward Work Scale (PTWS) composed

of 14 items<sup>5</sup> (Vallerand *et al.*, 2003), (Serrano-Fernández *et al.*, 2017). The understanding of passion at work is particularly relevant to human resource development professional (Nimon and Zigarmi, 2011) and scholars who wish to further understand the impact of passion in an organizational setting. Although the PTWS is well adapted to identify whether employees passion at Work are associated to HP or to OB, it does not measure the passion at work as way of life or way of being nor does it measure other outcomes of passion on employees' leaders (Balon, Lecoq and Rimé, 2013) such as wellbeing or work.

Entrepreneurial passion (EP) has attracted the attention of researchers and yet, it “lacked a robust and validated instrument for measurement” (Cardon, 2008), (Cardon *et al.*, 2013) . A systematic approach was therefore proposed involving two dimensions: Intense Positive Feelings and Identity Centrality (Cardon *et al.*, 2013) for measuring entrepreneurial passion based on 26 items which can be operated through a self-reported questionnaire (Fellnhöfer, 2017).

A limitation which needs to be pointed out is the lack of correlation made between entrepreneurs' passion and leader's passion. Entrepreneur-start up founders-CEO becomes leaders of their own company, leading followers manifesting distinct forms of leadership (Zaech and Baldegger, 2017) and facing different types of challenges requiring different of forms of leadership depending the growth trajectory (Freeman and Siegfried, 2015). Entrepreneurial leaders' passion is yet to be investigated with clear measurements.

Angela Duckworth investigated the personality trait that is found amongst successful individual and discovered that passion + Perseverance for long term goals leads to success; and this trait is called Grit (Duckworth *et al.*, 2007). A Grit scale and later a shorter version based on 12 items, has been constructed. The Grit questionnaire is also a self-reported questionnaire which has been fully tested and validated with various groups of people including organizational leaders (“Grit” the true predictor of success: Talent isn't everything. Being hardy and being able to persevere can help you succeed in business. This learnable trail was the focus of a title that was discussed at the most recent We Read For You presentation.’, 2017), (Clark, 2017).

### *Passion vs other motivational similar concepts*

Given the amount of motivational concepts (Vallerand, 2012a), (Von Culin, Tsukayama and Duckworth, 2014), (Zigarmi, Galloway and Roberts, 2016) which may be associated to passion in an organizational setting, it might prove useful to compare passion to other similar concepts. This would clarify how some of these constructs relate to passion, whether any of these concepts entails passion and how they differ.

Similar scholarly investigated motivational concepts which were associated to leadership in a work context include but are not limited to

- Grit (Kelly, Matthews and Bartone, 2014), (Kelly, Matthews and Bartone, 2014),
- Calling (Longman *et al.*, 2011)
- Zest for work (Peterson *et al.*, 2009)

<sup>5</sup> Items are distributed into two subscales with 7 items each, the first being harmonious passion, ( $\alpha = .70$ ; e.g. “3.- My line of work reflects the qualities I like about myself”) and the second obsessive passion ( $\alpha = .85$ ; e.g. “11.- I am emotionally dependent on my work”). The responses were gathered using a 7-point Likert- type scale (from 1 = totally disagree to 7 = totally agree).

- Engagement (Breevaart *et al.*, 2014), (Schmitt, Den Hartog and Belschak, 2016)
- Motivation (Shu, 2015), (Fernet *et al.*, 2015)
- Enthusiasm (Glassman and McAfee, 1990), (Damen, van Knippenberg and van Knippenberg, 2004)

Using the definitional elements of Work passion (Zigarmi *et al.*, 2009) the below comparative table has been constructed

	Grit	Calling	Zest for work	Engagement	Motivation	Enthusiasm
A state of well-being	No	No	Yes	No	No	No
Persistence	Yes	For some	For some	For some	Yes	For some
Emotionally positive	No	Yes	Yes	Yes	Yes	Yes
Meaning based	Yes	Yes	No	No	No	No
Recurring cognitive appraisals	Yes	Yes	Yes	Yes	Yes	Yes
Recurring affective appraisals	Yes	Yes	Yes	Yes	Yes	Yes
In job and organizational situation	Yes	Yes	Yes	Yes	Yes	Yes
Results in work intentions/behaviors	Yes	Yes	Yes	Yes	Yes	Yes

### *What passion it not*

With the aim of unpacking the definitional element of passionate leadership In organizations (PLIO), and to avoid confusion, it may prove beneficial to underline what passion at work is not. Based on the two definitions which can apply to passion in organizations, which is where the focus of this review lies, the two definitions of passion below are used to discuss what passion is not. Passion is defined as a “strong inclination toward an activity that people like, that they find important, and in which they invest time and energy”. Two types of passion are proposed: Harmonious passion (HP) and Obsessive passion (OP) in a Dualistic Model of passion – DMP (Vallerand *et al.*, 2003)”.

Work passion is defined as “an individual’s persistent, emotionally positive, meaning-based, state of well-being, stemming from reoccurring cognitive and affective appraisals of various job and organizational situations that result in consistent, constructive, work intentions and behaviors” (Zigarmi et al., 2009).

On the light of these definitions, passion is not

- Associated to activities, a job or organizational situations
  - which are not self-defining, not part of an individual’s identity
  - where the individual does not invest time, energy
  - which is meaningless
  - where the individual does not find praising element
  - experienced without positive emotions
  - where individual does not connect cognitively and affectively
- A state of unhappiness
- A lack of wellbeing

### *Conceptual definition of passionate leadership in organizations (PLIO)*

Following literature on entrepreneurial passion (Cardon *et al.*, 2013), (Murnieks, Mosakowski and Cardon, 2014), (Fellnhöfer, 2017), we can posit that passionate entrepreneurs are passionate leaders of their own venture where passion is utilised as a means to turn their business into a success (Chen, Yao and Kotha, 2009), (P. R. Newswire, 2014), (Clark, 2017).

According to a survey conducted on Canadian passionate Entrepreneurs-leaders, 53% believe that balancing work and life commitments is one of the greatest challenges they face on a daily basis (C. Newswire, 2014). This somewhat contradicts Goldsmith (2008) whose view is that passionate leadership leads to a work-life balance. (Goldsmith, 2008).

To arrive to a theoretical definition of passionate leadership In organizations, relevant attributes which pertain to the concept were analysed following a thematic analysis (Braun and Clarke, 2006):

- Data corpus were literature reviews and articles from peer-reviewed academic sources
- Data sources were generated from academic database EBSCO, Scopus, Science Direct and Google Scholar (June 2018)
- Data-driven coding was then performed in a systematic fashion across the entire data sets to find pertinent semantic meanings and latent features
- Themes were being searched for using a broader level of analysis, using an iterative/intuitive stance generating candidate themes
- Themes were then reviewed to keep coherence theme, sub themes with sufficient data to support them, prevalence of theme repeated was analysed and ranked
- Themes were then defined and named using labels

First, linked to passionate leadership: we looked at the cognate areas which pertain to the definition and the qualities attributed to:

- passion
- passionate state of being
- passionate leadership in education

Linked to the focus on the organizational environment, we looked at cognate areas which pertain to the definition and the qualities attributed to:

- Work passion
- Entrepreneurial passion

Second, all attributes which pertain to PLIO have been uncovered arriving to 26 items.

Third, multiple sub themes were created, and classified thematically rolling up to 8 themes, with a label attributed, composed of one word for each theme as illustrated in the table below:

Label	Theme	Sub themes
Purpose	Live life purposefully	Purpose, meaning in life

Identity	Be your authentic self	Value, self-identity
Better	Build a better world	Wellbeing, social and moral purpose
Power	Unleash your Power	Influence on followers
Perseverance	Never give up	Perseverance
Action	Make it happen	Action-driven
Life	A way of life	Emotional, Cognitive, Behavioral, Spiritual
Passion	Yin & Yang	HP, OP
Success	Successful leadership	Effective leadership

Fourth, the 26 item identified as pertaining to PLIO where being attributed a label each as shown below:

#### Passion

1	Identity	Self-defining
2	identity	Value-based
3	Life	Emotional
4	Life	Cognitive
5	Life	Behavioral
6	Passion	Harmonious passion (HP)
7	Passion	Obsessive passion (OP)

#### Passionate (state of being)

8	Purpose	With a purpose
9	Identity	Being authentic
10	Better	Desire of a positive impact

#### Passionate leadership

11	Life	Emotion driven
12	Identity	Value based
13	Purpose	Purpose based
14	Better	Search of Positive impact
15	Better	Longing for social justice
16	Better	With moral purpose
17	Power	Generate admiration and delight from followers

#### Passion at work

18	Life	Positive emotions
19	Purpose	Meaning-based

20	Better	Wellbeing driven
21	Perseverance	Drive consistent and constructive work intention/behaviour

#### Entrepreneurial passion

22	Power	intense affective state
23	Action	Behavioral (action-driven)
24	Life	Positive feelings
25	Action	Engagement driver
26	Passion	High propensity for OP

Fifth assessed the count of theme was assessed and three prevalent themes were found as highlighted in green below and listed here after.

In (...) are the prevalence % of theme determined out of 26 identified.

The three prevalent themes are:

- A way of Life (23%)
- Be your authentic self (15%)
- Build a better world (15%)

Label	Theme	Count	Prevalence (%)	Sub themes
Purpose	Live life purposefully	3	12%	Purpose, meaning in life
Identity	Be your authentic self	4	15%	Value, self-identity
Better	Build a better world	4	15%	Wellbeing, social and moral purpose
Power	Unleash your Power	2	8%	Influence on followers
Perseverance	Never give up	1	4%	Perseverance
Action	Make it happen	2	8%	Action-driven
Life	A way of life	6	23%	Emotional, Cognitive, Behavioral, Spiritual
passion	Yin & Yang	3	12%	HP, OP
Success	Successful leadership	1	4%	Effective leadership
		26	100%	

From this analysis, a theoretical definition for passionate leadership we are proposing is:

**“Passionate leadership In organizations (PLIO) is a leadership style identified as a way of life focused on bettering the world, while being authentic to oneself.”**

And an extension to this definition is: **“PLIO is also characterised by a clear purpose in life, affected by the impact of both Harmonious and Obsessive passions, with an influence on followers, to drive actions forward, persistently leading to success.”**

It might prove useful to compare PLIO with other forms of leadership, using the definitional elements of PLIO. The concept of PLIO has been compared to other forms of leadership. The

most cited leadership types (Gardner *et al.*, 2010) and a global reference publication in the field of leadership education “**Bass & Stogdill's handbook of leadership**” (Bass, 1990a), (Santora, 1992) have been consulted to develop this comparison.

This list includes:

- Transformational leadership may be directive or participative. It required higher moral development, transformational leadership is recognized universally as a concept (Bass, 1999) which includes 5 characteristics <sup>6</sup> on the leader. This type of leader has been characterized as one who articulates a vision of the future that can be shared with peers and subordinates, intellectually stimulates subordinates, and pays high attention to individual differences among people (Yammarino 1954- and Bass, 1990), (Lowe and Galen Kroeck, 1996).
- Charismatic leadership: is defined as a leadership which entails five characteristics “five specific personality traits. These include: self-monitoring, self-actualization, motive to attain social power, self-enhancement, and openness to change” (Jung and Sosik, 2006). It includes an element of passion as described by Tucker (1968) “They do not follow him out of fear or monetary inducement, but out of love, passionate devotion” (Tucker, 1968).
- Transactional leadership is defined as exchanges against rewards contingent upon a display of desired behaviors (Lowe and Galen Kroeck, 1996), (Waldman, Bass and Einstein, 1987). It has been investigated by a few scholars (Bass, 1990b), (Wofford and Goodwin, 1994).
- Inspirational leadership is defined as a subfactor of transformational leadership, which centres on delivering a convincing vision to the team, communicating confidence in team members, and invigorating the team (Joshi, Lazarova and Liao, 2009). It is found that investors seek more than inspirational leadership in entrepreneurs they invest in, they look for entrepreneurs who are passionate and tenacious (Murnieks *et al.*, 2016), (Bonau, 2017).
- Authentic leadership has been defined and investigated by scholars (Avolio and Gardner, 2005), (Fusco, O’Riordan and Palmer, 2015). Authentic leadership in organizations is defined as a process which leverages positive psychological aptitudes and a highly advanced organizational setting, which results in both further self-awareness and self-regulated positive behaviors from the leaders and associates, development positive self-development (Avolio and Gardner, 2005).
- Distributed leadership has attracted the interest of many scholars (Tian, Risku and Collin, 2016). As an attempt to define it, it “can be considered to incorporate shared, democratic, dispersed and other related forms of leadership.”(Harris et al., 2007), (Bolden, 2011).

<sup>6</sup> (1), the Transformational Leader knows to be charismatic and knows how to convey his beliefs (2), the Transformational Leader knows to motivate and inspire the team (3), the Transformational Leader raises creativity and finding original solutions (4), the Transformational Leader pays attention to each member of the team (5) (Barbinta, Dan, Muresbarbinta, 2017).

- Ethical leadership refers to ethical leaders who are altruistically motivated, caring, and concerned about their followers and others in society (Treviño, Brown and Hartman, 2003), (Brown and Treviño, 2006), (Gini and Green, 2014).
- Relational leadership is defined as a social influence process through which emergent coordination (i.e., evolving social order) and change (i.e., new values, attitudes, approaches, behaviors, ideologies, etc.) are built and generated. (Uhl-Bien, 2006).
- Vision-based leadership: it is often assimilated to Transformational leadership (Kantabutra, 2005) with vision which is core to the prevailing vision-based leadership (Kantabutra, 2009).
- Servant leadership which is found to have its roots since the ancient time (Gandolfi et al, 2017), “encourages followers' intellectual and skill development and enhanced moral reasoning capacity so followers become autonomous moral agents. In the workplace, servant-leaders are sensitive to the needs and desires of organizational stakeholders, hold themselves accountable, and encourage the intellectual and moral development of all around them” (Graham, 1991). Servant leadership is found to have its roots.
- Autocratic leadership (also known as authoritarian leadership) is a leadership style characterized by individual control over all decisions and little input from group members. Autocratic leaders typically make choices based on their own ideas and judgments and rarely accept advice from followers. Autocratic leadership involves absolute, authoritarian control over a group (Lewin and Lippitt, 1938), (Malos, 2012). It has attracted recent research (Harms *et al.*, 2018).
- Democratic leadership in groups with not one single leader. Leaderless group differs from leadership-less group. leadership remains but it is “diffused throughout the group” (Haiman, 1953). It is function of three roles: distributing responsibility among the membership, empowering group members, and aiding the group's decision-making process” (Gastil, 1994).
- Directive/participative leadership: these are leadership styles comprised within transformational leadership (Bass and Riggio, 2006). Directive leadership is defined as the process of giving subordinates with a guideline for decision making and action that favours the leader’s perspective (Sagie, 1997), (Hayes, 1999). It is also commonly perceived as a task- oriented behaviour, with a strong tendency to control discussions, dominate interactions, and personally direct task completion (Cruz, Henningsen and Smith, 1999). “Participative leadership is defined as “the process of having a shared influence in decision making, by a leader and his or her subordinates” (Hayes, 1999).

The table here after summarizes the comparison between PLIO with other leadership concepts listed previously





### *Gaps identification*

In this study, we investigated the concept of PLIO. Although a conceptual definition has been proposed, it is important to address several elements which are identified as gaps.

- I. More literature could have been included as part of this review to broaden the scope of the definition
- II. The analysis which led to a conceptual definition has not been corroborated with organizational leaders and their followers which leave the definition theoretical and not yet practical
- III. Cultural nuances may impact the attributes collected which compose the theoretical definition of PLIO
- IV. A measure for PLIO has not been identified

### *Recommendations*

This review will serve for further research, and more is required to understand the concept of PLIO.

Although the theoretical definition of PLIO is based on a thorough review of existing scholarly literature, themes identified must be corroborated interviewing organizational leaders and their followers to verify the correlation with the proposed definition.

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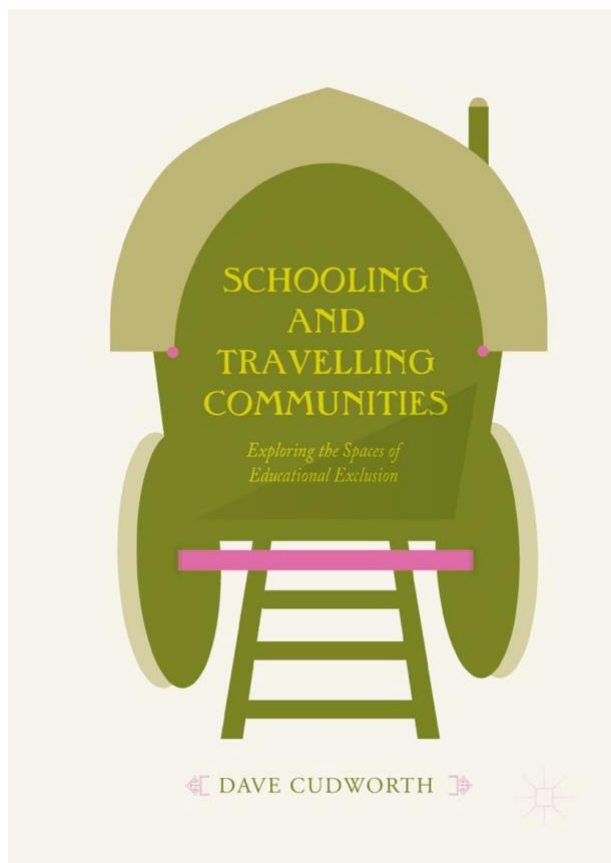
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*Publication news from UEL PhD Alumni and Alumnae*

*2017-2018*



## Selected Books



### Schooling and Travelling Communities

Exploring the Spaces of Educational Exclusion

By Dave Cudworth, 2018

Highlights the key role that spaces, such as schools, hold within an educational context

Explores the difficulties faced by those with nomadic lifestyles to engage with the requirements of schools

Interrogates why Traveller/Gypsy achievement has not risen despite attempts to integrate the community into educational contexts over the last half century

ISBN 978-3-319-91364-3

This book calls for a re-thinking of educational provision for Gypsy / Traveller communities.

Despite having been recognised by the government and educational providers for over fifty years, underachievement of children from Gypsy / Traveller communities persists. Rather than focusing specifically on access, attendance and attainment, the author provides a structural analysis of the cultural tensions that often exist between Nomadic communities and current school provision based on the interests and values of Sedentarism. The author uses spatial theory as a base upon which to build knowledge and understanding of the educational exclusion of children from Gypsy / Traveller communities, highlighting the social role that space plays within schools. This innovative book will be of interest and value for students and scholars interested in not only education and Gypsy / Traveller communities, but education for minority communities more widely.

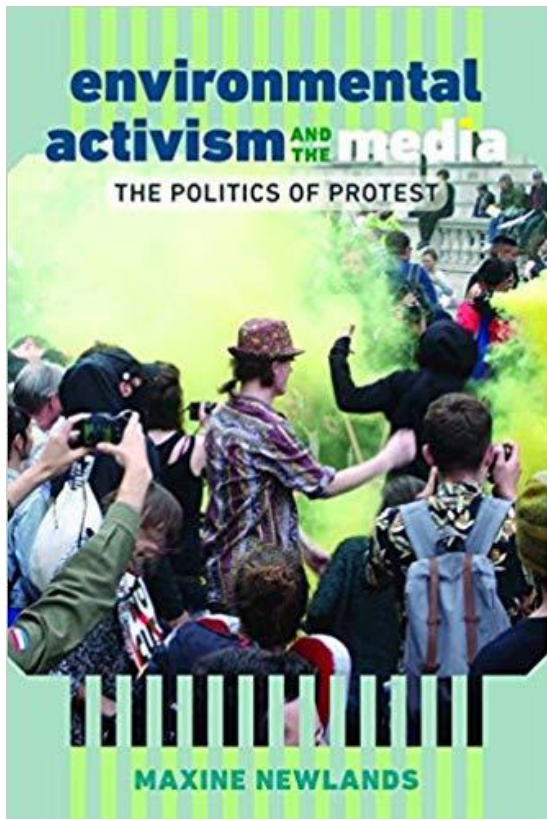
## *Reviews*

“This book is a fascinating, and highly readable, contribution to the growing literature on space, place and schooling. Drawing on Henri Lefebvre’s *Production of Space*, Cudworth’s ethnographic study of the everyday experiences/ ‘lived spaces’ of Gypsy-Traveller children and families challenges Modernity’s spatial orthodoxy of sedentarism. The historical chapters argue that Britain’s post-World War two egalitarian project, with its dual aims of nurturing social democracy and children’s creativity, has been supplanted by the neo-liberal project of competition between individuals and schools. Children are ranked by scores on tests based on age-group ‘norms.’ They and their schools are rewarded or penalised for regularity of attendance. Emanating from the metropolitan spaces of the ‘conceived,’ these assimilationist policies fail to acknowledge or build upon the nomadic spatial orientations of Gypsy-Traveller communities. Turning towards ‘progressive’ precedents such as Summerhill, Cudworth suggests practical curricula based on children’s and their families’ work and craft activities.” (Sue Middleton, Waikato University, New Zealand)

“Dr Cudworth’s book reinvigorates the debate regarding the educational exclusion of Travelling Communities. He convincingly shows how ‘Sedentarism’ is an unacknowledged aspect of neo-liberal policy, mapping the history of this idea through decades of British history powerfully demonstrating its confluence with other forms of oppression. Empirically, the book shows through interviews with members of the TESS (Traveller Education Support Services) and children how schooling systematically codes ‘placelessness’ with deviancy. Space is developed as the missing component in theories of intersectionality in education. Although Cudworth is aware of the ways in which neo-liberalism grounds down possibilities of resistance, through considering the positive actions of teachers and communities he provides suggestions for an alternative education constructed around nomadism.” (Professor John Preston, University of Essex, UK)

**Dr Dave Cudworth** is the Head of the Division of Education at De Montfort University, UK. Prior to his move into academia he was a primary school teacher. His research interests include educational social justice, spatial approaches to education and forest schooling. He started his PhD at the School of Social Sciences under the supervision of Professor Maria Tamboukou, who remained his external supervisor when he moved to the University of De Montfort.





## Environmental Activism and the Media

*The Politics of Protest*

By *Maxine Newlands*, 2018

ISBN: 978-1-4331-5012-8

For more than 40 years politicians, activists, advocates, and individuals have been seeking ways to solve the problem of climate change. Governments and the United Nations have taken an economic path, while others seek solutions in the equality of climate justice. Taking the step from green consumer to the streets at climate summits and protest camps, as well as taking direct action recasts activists as everything from tree huggers, to domestic extremists, to ecoterrorists. Political policing and new legislation increasingly criminalizes environmental activism, supported by

media reporting that recasts environmental activism as actions to be feared.

Why this has happened and how activists have learned to circumvent the media's recasting is the story of *Environmental Activism and the Media: The Politics of Protest*. Through media movements to persuade the moveable middle, high court challenges, and gatekeeping, activists have found ways to challenge media and political discourse.

This book identifies four key areas to tie together diverse sets of green governmentality, traditional media discourse, and activism: (1) environmental governance and green governmentality; (2) historical media discourse; (3) alternative communication infrastructures; and (4) local to the global. Using data from 50 interviews, archival research, and non-participatory observation from environmental activists from the UK, USA, and Australia, this text will show why protest is important in democratic political participation.

From activists to slacktivists, *Environmental Activism and the Media: The Politics of Protest* is for those with an interest in cultural, social, and political studies; democratic processes; climate and social justice; governmentality; and/or the study of environmental politics, human geography, communication, and sustainability.

Dr. Maxine Newlands is a Senior Lecturer in Political Science and International Relations in the School of Social Science at James Cook University, Australia. Her Ph.D. studies were in environmental politics and the media over in the UK at the School of Social Sciences, UEL under the supervision of Professor Erika Cudworth and Dr Stephen Hobden. Before entering academia, Maxine was a broadcast journalist with the BBC and commercial radio.

## Selected Edited Collections



### *Contesting British Chinese Culture*

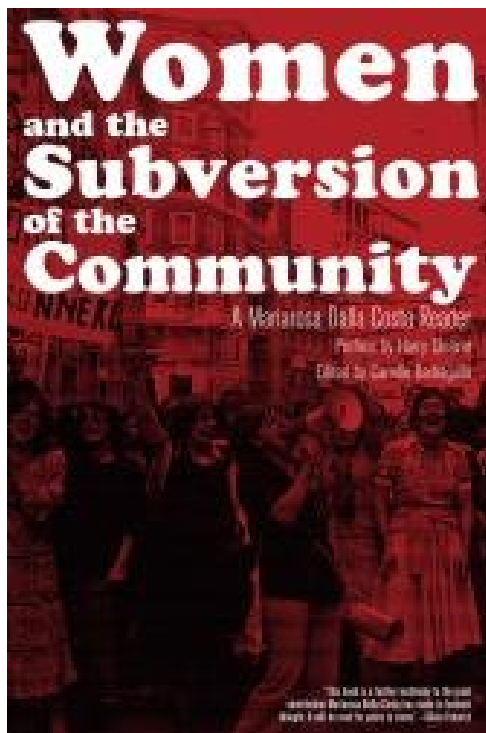
Edited by **Thorpe**, Ashley, **Yeh**, Diana, © 2018

ISBN 978-3-319-71159-1

- The first book to address the topic of British Chinese Culture
- Takes an interdisciplinary perspective, appealing to Cultural Studies, Race/Ethnicity and Diaspora Studies, Theatre Studies, Art, Film and Media Studies and Sociology
- Covers artistic collaborative practice and commercial co-productions that cross national and ethnic boundaries

This is the first text to address British Chinese culture. It explores British Chinese cultural politics in terms of national and international debates on the Chinese diaspora, race, multicultural, identity and belonging, and transnational 'Chineseness'. Collectively, the essays look at how notions of 'British Chinese culture' have been constructed and challenged in the visual arts, theatre and performance, and film, since the mid-1980s. They contest British Chinese invisibility, showing how practice is not only heterogeneous, but is forged through shifting historical and political contexts; continued racialization, the currency of Orientalist stereotypes and the possibility of their subversion; the policies of institutions and their funding strategies; and dynamic relationships with transnationalisms. The book brings a fresh perspective that makes both an empirical and theoretical contribution to the study of race and cultural production, whilst critically interrogating the very notion of British Chineseness.

Diana Yeh is Lecturer in Sociology, Culture and the Creative Industries at City, University of London, UK. She completed her PhD at the School of Social Sciences, University of East London under the supervision of Professors Nira-Yuval Davis and Maria Tamboukou, in 2010.



## *Women and the Subversion of the Community: A Mariarosa Dalla Costa Reader*

Edited by Camille Barbagallo, 2019

ISBN: 978-1-62963-570-5

This collection brings together key texts and previously unavailable essays of the influential Italian feminist author and activist Mariarosa Dalla Costa. In recent years there has been both a renewed interest in theories of social reproduction and an explosion of women's struggles and strikes across the world. The collection offers both historical and contemporary Marxist feminist analysis of how the reproduction of labour and

life functions under capitalism.

Dalla Costa's essays, speeches, and political interventions provide insight into the vibrant and combative women's movement that emerged in Italy and across the world in the early 1970s. Since the publication of *Women and the Subversion of the Community* (1972), Dalla Costa has been a central figure in the development of autonomist thought in a wide range of anticapitalist and feminist social movements. Her detailed research and provocative thinking deepens our understanding of the role of women's struggles for autonomy and control over their bodies and labour. These essays provide critical and relevant ideas for anticapitalists, antiracists, and feminists who are attempting to build counterpower in the age of austerity.

### **Praise:**

"This book is a further testimony to the great contribution Mariarosa Dalla Costa has made to feminist thought. It will be read for years to come."

—Silvia Federici, author of *Revolution at Point Zero*

"This publication is a major step in the constitution of a subversive feminist historiography. Mariarosa Dalla Costa's contribution has been at the vanguard of the theorization of the relation between the oppression of women and capitalism."

—Morgane Merteuil, researcher, coeditor of *Pour un féminisme de la totalité*

"That capitalism organizes society to be divided into a 'private' sphere of the home and a 'public' sphere of the workplace is commonly acknowledged by all. What is not recognized is how capital consistently tries to depoliticize the 'private.' Even revolutionaries have sometimes been in thrall of this particular obfuscation, limiting their anticapitalist strategizing to the workplace alone. Mariarosa Dalla Costa's works, since the 1970s, have unfailingly pierced this veil. By theorizing the reproduction of labour power to be the precondition for capitalism's functioning, Dalla Costa

has always illuminated for us the immense political potential of the private. Connecting unpaid labour in the home to the paid work of the wage worker, and by linking the naturalization of women's work to the capitalization of nature, Dalla Costa, in her scholarship and on the streets, continues to model for us an insurgent, irrepressible, anticapitalist feminism.”

—Tithi Bhattacharya, editor of *Social Reproduction Theory: Remapping Class, Recentering Oppression*; national organizer for the International Women's Strike

**Dr Camille Barbagallo** is a feminist activist and researcher. Her research, situated within Marxist feminist theory, gender, and black studies, explores how the reproduction of labour-power is valued, what it costs, and who pays the bill. She completed her PhD at the University of East London in 2016 under the supervision of Professors Massimo de Angelis, Erika Cudworth and Maria Tamboukou.

## Selected articles and chapters

**Godin, Marie. 2017. [Breaking the Silences, Breaking the Frames: A Gendered Diasporic Analysis of Sexual Violence in the DRC, Journal of Ethnic and Migration Studies, Special issue: Diaspora Mobilizations for Conflict and Postconflict Reconstruction: Contextual and Comparative Dimensions](#)**

*Abstract:* The role of diasporas in fuelling conflict has been extensively studied, with much less attention being paid to their role in peace-building. It is increasingly recognised that diasporas from conflict regions are contributing to the reconstruction of their countries of origin, acting as ‘peace-makers’ rather than ‘peace-wreckers’. Women and men migrants have also been found to engage differently towards their country of origin, but attention to women's activism is still scarce. This article addresses the issue of political activism by Congolese women in the diaspora in both the UK and Belgium. Their activities are assessed analytically through the prism of ‘mechanisms of framing’, which shape the ways in which messages are conveyed during the mobilisation process. The paper discusses diagnostic, motivational and prognostic frames to address sexual and gender-based violence against Congolese women in the protracted conflict in the Democratic Republic of the Congo. Framing strategies vary among Congolese diaspora women's groups depending on the national context in which they are embedded (Belgium and the UK) but a variety of narratives is also discerned which transcends and is shared among Congolese women beyond national borders.

**[Gunkel, Henriette](#) and Annas, Max. 2018. An Act of Citizenship - Mozambican Films from Kuxa-Kanema to a Cinema of Re-sistance. In: Antje Schuhmann and Mistri Jyoti, eds. *African Women in Film*. Pretoria: Unisa Press.**

**Johanssen, J. 2018. Towards a Psychoanalytic Concept of Affective-Digital Labour. Media and Communication. 6 (3), pp. 22-29.**

*Abstract:* This article draws on the argument that users on corporate social media conduct labour through the sharing of user-generated content. Critical political economists argue that such acts contribute to value creation on social media and are therefore to be seen as labour. Following a brief introduction of this paradigm, I relate it to the notion of affective labour which has been popularised by the Marxist thinkers Michael Hardt and Antonio Negri. To them, affective labour (as a sub-category of immaterial labour) denotes embodied forms of labour that are about passion, well-being, feelings of ease, immaterial products and generally a kind of communicative relationality between individuals. I point to some problems with a lack of clarity in their conceptualisation of affective labour and argue that the Freudian model of affect can help in theorising affective labour further through a focus on social media. According to Freud, affect can be understood as a subjective, bodily experience which is in tension with the discursive and denotes a momentary feeling of bodily dispossession.

In order to illustrate those points, I draw on some data from a research project which featured interviews with social media users who have facial disfigurements about their affective experiences online. The narratives attempt to turn embodied experiences into discourse

**Johanssen, J. 2018. Gaming-playing on social media: using the psychoanalytic concept of 'playing' to theorize user labour on Facebook. Information, Communication & Society. 21 (9), pp. 1204-1218.**

*Abstract:* Political economists have argued that user activity on corporate social media is regarded as labour that appears playful and fun but is exploited and sold to advertisers for profit maximization. This article begins with the working assumption that such user labour on social media constitutes a form of playing. It is theorized through a psychoanalytic perspective on the term as developed by D. W. Winnicott and André Green. The notion of gaming-playing is put forward to account for set interface structures on Facebook that resemble a game as well as free-flowing dimensions more akin to playing. Some user discourses on Facebook are analysed through this prism. A psychoanalytic conceptualization of user labour as playing allows one to analyse both positive discourses that emphasize Facebook as a space for creativity, exploration and the unknown, as well as negative discourses that critique the platform with regard to lacking privacy controls or data ownership. Both discourses are conducted in a playful manner that creatively utilize a sense of user agency in relation to others and Facebook itself, but often remain without consequences.

**Garrisi, D. and Johanssen, J. 2018. Competing narratives in framing disability in the UK media: a comparative analysis of journalistic representations of facial disfigurement versus practices of self-representations online. JOMEC Journal. 12, pp. 128-144.**

*Abstract:* By using discourse analysis, this paper compares and contrasts the journalistic coverage of the story of a beauty blogger with facial disfigurement with her blog. On the one hand, we will show the extent to which a self-representational account may align with the journalistic coverage, reinforcing rather than contesting mainstream representations of disability. On the other, we will demonstrate how a person with a disfigurement can use blogging to reclaim her own identity and challenge the medical objectification of her body perpetuated by mainstream media. This research

found that rather than being mutually exclusive, journalism and blogging can play a complementary role in shaping the society's understanding of the complexities and contradictions surrounding disfigurement.

**Johanssen, J. 2018. Not Belonging to one's Self: Affect on Facebook's Site Governance page. *International Journal of Cultural Studies* . 21 (2), pp. 207-222.**

*Abstract:* This article makes a contribution to a growing number of works that discuss affect and social media. I use Freudian affect theory to analyse user posts on the public Site Governance Facebook page. Freud's work may help us to explore the affectivity within the user narratives and I suggest that they are expressions of alienation, dispossession and powerlessness that relate to the users' relations with Facebook as well as to their internal and wider social relations. The article thus introduces a new angle on studies of negative user experiences that draws on psychoanalysis and critical theory.

**Vieten, U. M. 2018. Ambivalences of Cosmopolitanisms, Elites and Far-Right Populisms in Twenty-First Century Europe in *Populism and the Crisis of Democracy*. Mackert, J., Turner, B. & Fitz, G. (eds.). London: Routledge, Vol. 2, p. 101-118**

**Vieten, U. M. & Yuval-Davis, N., May 2018, Citizenship, entitlement, and autochthonic political projects of belonging in the age of Brexit, in *Enfranchising Ireland?: Identity, citizenship and state*. Ellis, S. G. (ed.). Dublin: Royal Irish Academy, p. 70-80.**

*Abstract:* The chapter examines some of the reasons why different sections of British society, particularly in England and in Wales, have voted for Brexit and links it with recent developments with the ways people and governments are being engaged in racialized political projects of belonging. The overall argument is that Brexit should be analysed in the context of the reactions of people and governments to the global and local double crisis of governability and governmentality. The rise of populist politics among British people, including some of its racialized minorities, needs to be seen against the background of the British 2014 & 2016 Immigration Acts which established 'everyday bordering' as the primary technology of controlling diversity and discourses on diversity, so undermining convivial pluralist multi-cultural social relations. In these processes, border guarding is added to citizenship duties, and the boundaries of social rights are being shifted from the boundaries of civil society towards the boundaries of political citizenship.

**Vieten, U. M. 2018, "Europe is for being recognized for more than an ethnic background": Middle class British, Dutch and German minority citizens' perspectives on EU citizenship and belonging to Europe' In : *Cosmopolitan Civil Societies: An Interdisciplinary Journal*. 10, 1, p. 27-45**

*Abstract:* The paper pinpoints some crucial themes of European belonging and transnational identities arising in the narratives of minority key activists with various hyphenated national citizenship status, e.g. South Asian-Brits, Moroccan-Dutch and Turkish-Germans. In the context of the current post-cosmopolitan climate with a political shift to the far-right across Europe,

concerns of visible minority citizens struggling with racisms and a lack of inclusion in the European project, are discussed. In this original research 43 key minority activists, academics and professionals, were interviewed between autumn 2009 and summer 2012, predating Brexit in 2016. The 'new' citizens interviewed in this sample live in major and middle sized cities, and their individual feelings of belonging to Europe, perceptions of being European and cosmopolitan are very much shaped by urban metropolitan spaces. The findings of the study underline ambivalent post-cosmopolitan identities and more complex notions of 'race', racism and ethnicity, particularly in Britain and the Netherlands and due to specific post-colonial situations impacting the individual feeling of belonging to Europe.

**Vieten, U. M., 2018 'The New Year's 2015/ 2016 Public Sexual Violence Debate in Germany: Media Discourse, Gendered Anti-Muslim Racism and Criminal Law' in Media, Crime and Racism. Bhatia, M., Poynting, S. & Tufail, W. (eds.). 1st ed. London: Palgrave Macmillan, p. 73-92.**

*Abstract:* This chapter discusses some of the national and international media coverage of the New Year's Eve 2015/2016 sexual attacks, and the political, legal and societal responses to it in the period January to July 2016. With this reflection it contributes to international debates on Islamophobia, Anti-Muslim racism and gender.

Vieten, UM. 2018, [Refugees, displacement and moving bodies: studying loss and the language of dance](https://www.opendemocracy.net/ulrike-m-vieten/refugees-displacement-and-moving-bodies-studying-loss-and-language-of-dance), <https://www.opendemocracy.net/ulrike-m-vieten/refugees-displacement-and-moving-bodies-studying-loss-and-language-of-dance>

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