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**Critically with Foucault:
Anarchaeology of Education
and Public Spaces**

by

Helena Ostrowicka &
Justyna Spsychalska-Stasiak

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From the Editors. Critically with Foucault: Anarchaeology of Education and Public Spaces

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This thematic volume was inspired by the discussions held during the academic conference *Critically with Foucault: Anarchaeology of Education and Public Spaces* organized by Kazimierz Wielki University in Bydgoszcz, in cooperation with the University of Gdańsk and the University of Lodz on November 27-28, 2018. The theme of the conference referred to two previous meetings devoted to Michel Foucault's thought and its present-day reception—the symposium entitled “Remembering Foucault. Power, Knowledge, Resistance in Contemporary Research Reflection”¹ held at the University of Lodz in 2014, and to the conference “Governmentality—What Comes Next?”² organized at the University of Gdańsk in 2016.

The discussions held during the conference at Kazimierz Wielki University were an expression of critical action “with Foucault.” As we believe, reflection encompassing the archaeology of education and public space has become particularly necessary when, in view of declining trust in scientific knowledge and the dizzying rise of the phenomenon known as “post-truth,” constructivist and post-structuralist researchers need to face the consequences of programmatic distancing from the “truths” subjected to analysis, and from absolutizing certain versions of “reality.” Michel Foucault's *oeuvre* can still provide impulses and conceptual

categories for dealing with the researchers' assumptions and the possibility of transgressing them and expanding their cognitive horizons in the research process, and in at least several ways.

First, following the “anarchaeology” mentioned in the title, we may practice criticality as a theoretical and practical stance preceding and concluding the research process, grounded in the principle of the non-necessity of power and understanding orders of knowledge. Michel Foucault, in his lectures delivered in 1980 at the Collège de France, used this neologism as a play on the words “anarchy,” “archaeology,” and “genealogy” (Foucault 2014). The term archaeology encompassed multiple levels of problematizing issues of truth, power, discourse, and subjectivity. Understood as a research stance, Foucault's term, exposing the non-obvious nature of power relations, practices of knowledge production and distribution, and “regimes of truth” about the social reality under study also comes to the fore in the researcher's reflexivity and criticality towards their scientific output. Such reflexivity can also be a way of intensifying epistemological paradoxes that are not seen in terms of obstacles or dead ends (see: Baker 2007; Saari 2017).

Secondly, it is also possible by adopting an interdisciplinary research perspective that, on the one hand, absorbs heterogeneous concepts and theories, and, on the other, does not shy away from experimenting with the research “toolbox” in the spirit of creating new conceptual constructs. Foucault's works on resistance, transgression, parrhesia, alethurgy, confession, aesthetics of existence, or governmentality (e.g., Foucault 1972; 1977; 1978; 2009; 2010; 2014), as well as the philosopher's well-known appeal: “Do not ask who I am and do not ask me to remain the same” (Foucault 1972:15) are an encouragement and,

¹ See the thematic volume of *Przegląd Socjologii Jakościowej* entitled “Perspektywa Foucaultowska we współczesnej refleksji badawczej [Foucauldian Perspective in Contemporary Research],” edited by Magdalena Nowicka and Karol Franczak, 2016, vol. 12, no. 1.

² See the thematic volume of *Miscellanea Anthropologica et Sociologica*—“Governmentality i co dalej [Governmentality and What Next]?”—edited by Marek Czyżewski, Dominik Krzyński, Ewa Marynowicz-Hetka, Maria Mendel, and Tomasz Szkudlarek, 2018, vol. 19, no. 3.

at the same time, a methodological guideline for viewing social and educational phenomena in an “anti-disciplinary” way.³

Thirdly, and finally, the inclusion of diverse discursive and non-discursive elements (material, organizational, institutional, and other) in empirical research can help researchers with constructivist and poststructuralist orientations to face the difficult aporia between neutrality and distancing oneself from the phenomena under study and normativity and the need to value them. Methodological concern for grasping the “archive of discourse” and social practices empirically, in a multi-contextual manner, is conducive to conducting emotionally involved research, which also remains in line with the postulates of research reliability. It is criticality differentiated from criticism, as it manifests itself in a reflexive approach to socio-cultural reality in its empirical complexity and multi-faceted nature.

The texts gathered in this volume are a response to our invitation to speak up for criticism in education and public space, to reflect on the potential and limitations of Foucault’s ideas for investigating current, contemporary social and cultural phenomena and problems. Thus, the present volume opens with a transcription of the discussion panel *The Politics of Truth in Education and the Public Space*, which was held on November 28, 2018, as a summary of the proceedings taking place during the two-day conference. The issues raised by the speakers centered on the manifestations of the politics of truth in public space and education, while the philosophical achievements of the French thinker marked the theoretical and methodological horizon of the discussion. It was moderated by Helena Ostrowicka (Kazimierz Wielki University),

and the following guests took the floor (in order of appearance): Marek Czyżewski (University of Lodz), Ewa Marynowicz-Hetka (University of Lodz), and Maria Mendel (University of Gdańsk). The discussants included Ryszard Mordarski (Kazimierz Wielki University) and Doctor Cezary Rudnicki, then a doctoral student at the University of Warsaw.

During his mini-lecture, Marek Czyżewski drew attention to the phenomenon of *governmentality without truth*, which is characteristic of the modern reality of communication. It consists in replacing the truthfulness of publicly proclaimed opinions with their populist attractiveness and emotional coloring. The contemporary implosion of ever more heterogeneous and multiplied meanings, resulting in reducing the sense ascribed to them, simultaneously strengthens the attitude of indifference to the issue of truth in public communication. The concept signaled by Czyżewski, significantly expanded in the article “Governmentality without Truth: An Essay on the Role of Foucauldian Thinking in a Post-Truth Society” published in this volume, does not avoid methodological inquiries either. Analyzing the limitations of such Foucauldian analytical categories as the will to know, speaking the truth, parrhesia, and admonition, the author formulates the need to include various postmodern concepts of power in the analysis of the phenomenon he is interested in.

The category of regimes of truth, understood as a relation binding the act of revealing the truth with the subject, was emphasized by Ewa Marynowicz-Hetka. Starting from the emphasis on the normative dimension of education, the author drew attention to the consequences resulting from the occurrence of mechanisms and self-management strategies in the relations between the educator and the educated. Considering Foucault’s understanding of

³ Foucault’s own formulation (cf. Taylor 1986).

subjectivity in the context of an always unbalanced educational relationship, she poses a fundamental question: Do the tactics and strategies (of self-leadership) described by Michel Foucault testify to the objectification, reification, and commodification (fr. *marchandisation*) of the relations in question, or do they rather reveal the need for their present shape in educational practice?

In her turn, Maria Mendel, by embedding education in the broadly understood public space, emphasizes the role of the past in establishing modern times. Referring to Paulo Freire's book *Pedagogy of the Heart* published in 1997 and to Zygmunt Bauman's book *Retrotopia* published exactly ten years later, the author formulates a kind of warning against the sort of *retromania* understood as the principle of returning to what was before. According to the author, the restoration of the idea of a strong state, the revival of nationalism, and the cultivation of social divisions based on race, class, and gender are indicators of a strong fear of confronting a future that is impossible to predict. In the process of overcoming it, it is necessary to organize educational conditions and practices whose indisputable basis is the experience of freedom and contact with the perspective of the other. For this reason, the author ends her considerations by referring to the concept of public pedagogy by Gert Biesta.

The article by Jacek Woźny, entitled "Archeology as a Metaphor in Contemporary Culture," opens the collection of texts which are elaborations on papers, theses, and statements presented at the conference. The author pays attention to the ambiguous status of archaeology in contemporary culture and science. The scientific classifications of this discipline, chronologically ordered and characterized by Jacek Woźny, indicate that archaeology went through var-

ious stages of development and improvement of research methods. Importantly, in the mid-20th century, archaeology also became a cognitive metaphor and inspired other fields of culture and science to take a "stratigraphic" look at their history. The author considers the possible consequences of these inspirations in terms of the trivialization or ossification of the archaeological metaphor. Although, today it is still fresh and stimulating in the study of the media ("media archeology"), photography ("archaeology of photography"), dance ("archaeology of dance"), or modernism ("archaeology of modernism").

Marek Czyżewski, in turn, "deals with" Foucault's notions of knowledge and power. In the article "Governmentality without Truth: An Essay on the Role of Foucauldian Thinking in a Post-Truth Society," which is a continuation of the author's comments formulated during the panel discussion, he offers a separate look at the evolution of the ideas of knowledge and power in Foucault's work. The author puts forward and supports the claim that the usefulness and significance of Foucault's approach to knowledge and those of his approach to power differ in their application to contemporary culture. While Foucault's approach to the question of power and the direction of its shift towards the so-called governmentality is pertinent to the evolution of Western civilization, his approach to the question of knowledge developing towards the question of truth and truth-telling does not reflect contemporary cultural changes. Marek Czyżewski makes a nuanced assessment of Foucault's work, highlighting the dominant features of contemporary culture and the role of sociology in the processes of governmentality.

The considerations presented in the article by Miroslav Dopita and Jana Poláchová Vašátková indicate

the entanglement of the Czech higher education sector in the assumptions of neoliberalism. The main subject of the study described in the article is the organization and effects of pedagogical doctoral studies analyzed from the point of view of their adequacy to the requirements of the Czech labor market. The theoretical basis for the authors' investigations is the concept of arrangement, proposed by Michel Foucault, applied to the analysis of the most important legal acts, reports, and documents influencing the shape of the Czech higher education system. Its use led the authors to identify three paradoxes in the way pedagogical doctoral studies are organized in the Czech Republic. These refer, in turn, to study programs, training of university teachers, and accreditation programs.

Magdalena Nowicka-Franczak's research presented in the article "Post-Foucauldian Discourse and Dispositif Analysis in the Post-Socialist Field of Research: Methodological Remarks" is an example of theoretical and methodological considerations aiming at legitimizing a new area of analysis for post-Foucauldian discourse analysis and dispositif analysis. Searching for an answer to the question of the possibility of applying these perspectives to the study of governance, subjectivization, and power in post-socialist societies, the author reviews Polish and German studies in this field. Her reconstruction is preceded by a systematic reflection on Michel Foucault's attitude towards neoliberalism. The methodological directives proposed on this basis introduce elements of semiotics, contemporary anthropology, and selected approaches to cultural identity into the analysis of the dispositif. The assumptions of the post-Foucault discourse analysis are extended by the postcolonial perspective, which takes into account the practices of normalization in post-socialist societies seen in the center-periphery relation.

Postcolonial concepts constitute an important context also in Maciej Jabłoński's article, "The 'Illusion' of Social Research/Action. Reflections on Neo-Colonial Pedagogy," in which the author describes the mechanisms of limiting access and exclusion of people with disabilities from most of the rights to which healthy people are entitled. His characterization of the differences between colonialism and the post-colonial perspective shaped on its basis led to the conclusion that we are currently witnessing neo-colonial domination of healthy people over the interests, needs, and subjectivity of people with disabilities. The author finds examples confirming the validity of this assertion in selected areas of social practice, such as national educational policy and ways of producing scientific knowledge in such disciplines as special education, economy, or social policy. The entire reflection is set in the perspective of post-colonialism which, starting from the criticism of institutional tools of exerting coercion on the lives of subordinated individuals, simultaneously enables demystifying the mechanisms responsible for maintaining the illusion of decolonization.

The closing text by Helena Ostrowicka is a methodological proposal to integrate various Foucauldian concepts in analyzing the discourse on the reform of higher education in Poland. The author joins the discussion on the possibilities and limitations of concretizing such notions as knowledge, alethurgy, confession, or dispositif, and their application in empirical research on discourse. Within the frames of the post-Foucauldian research perspective, she singles out and describes the archeological, alethurgical, and dispositif-related strategies, and provides an example of their complementary application in a research project entitled "The Governmentality of University—A Discursive Image of the Contemporary Reform of Higher Education in Poland." The

broad aims of this study include discourses constructed in three institutional contexts: science, government, and the media. The preference for specific theoretical categories led the author to distinguish three analytical strategies, which are characterized by a differentiated distribution of accents in the analysis and understanding of discourse and its relations with knowledge and power.

For obvious reasons, the present volume does not exhaust the possible threads of reflection inspired by Michel Foucault's works, including those related

to the study of contemporary problems of education and the public sphere. It is the result of continuing the discussion on the contemporary reception of Foucault's ideas and the effect of meeting at a specific place and time of researchers studying various areas of social life. We trust that this thematic collection will meet with the interest of our readers and will provide impulses for reflection on the perspectives of using Foucault's work and developing criticality as a specific attitude and style of thinking, which would not fall—as Jan Masschelein (2004) put it—into the trap of trivialization.

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Panel Discussion

The Politics of Truth in Education and the Public Space: Discussion at the Opening of the Volume

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Participants: Marek Czyżewski, Ewa Marynowicz-Hetka, Maria Mendel, Ryszard Mordarski, Cezary Rudnicki

Host: Helena Ostrowicka

Helena Ostrowicka: The pretext for today's discussion panel are the lectures of Michel Foucault which are devoted to the practices of producing and manifesting truth.

This year we have an excellent opportunity to come back to these lectures on account of significant publishing events. First of all, a Polish edition of lectures in the Collège de France and Louvain was published, where the French philosopher tackled the issues of truth, veracity, and avowal. These are the collections entitled "The Government of Self and Others," published by PWN, and a book entitled "Wrong-Doing, Truth-Telling. The Function of Avowal in Justice," published by Znak. Secondly, a Polish edition of François Noudelmann's book, "The Genius of Lies," was published in September, in which one of the discussed issues is Foucault's "courage of lies."

To start the discussion on the politics of truth in education and the public space, I am going to paraphrase the words of Foucault from a lecture given on January 14, 1976.

General problems may be worded as follows: to which rules, embedded in the educational and the public sphere, does the authority resort in order to create a discourse of truth? What kind of power is capable of generating discourses of truth in education and public space?

First of all, I would like to ask Professor Marek Czyżewski to speak.

Marek Czyżewski: I venture to say that examining the issue of the discourse of truth today requires a revision of Foucault's perspective. As is known, Foucault's works, from the beginning to the end of his scientific activity, feature two threads: on the one hand, there is the problem of power (later, the problem of *governmentality*), and on the other hand, there is the problem of knowledge (as well as the will to knowledge, regimes of truth, later acts of truth, and, in particular, acts of avowal and *parrhesia*, that is, truth-telling). Foucault always combined these two threads and treated them as intertwined. This is the key content contained in his research perspective, so far associated with a neologism proposed by Foucault, namely, "power-knowledge." During the lectures of 1979/1980, Foucault changed the terminology, but he continued to follow the traces of his fundamental conviction, and now he speaks about the inseparable relation of the exercise of power with the manifestations of truth.

Thus, I believe that the first of the aforementioned threads, that is, Foucault's understanding of power (and *governmentality*), still remains valid. However, it is worth considering whether the modern forms of *governmentality* are always related to the determination, or expression of truth. And thus: does Foucault's axiom (conviction about the inevitable convolution of power and truth-establishing practices) stand the test of time in the conditions of contemporary culture? Insofar as Foucault showed an exceptional gift of foresight with respect to the transformation of relations of power in the direction of the ruling, in my opinion, he failed to sense the direction of cultural changes with respect to the indifference to the truth, that is, in the direction of phenomena called post-truth and regimes of post-truth (this last term was proposed by Jason Harsin). Harry Frankfurt's essay "On Bullshit" is also in-

structive with respect to the indifference to truth. The essay was written in the 1980s, but its relevance is on the rise today.

I would like to put forward a thesis which is a heresy from Foucault's point of view: today, we are dealing with *governmentality* with simultaneous progressing indifference to the issue of the truthfulness of messages, that is, to put it briefly: *governmentality* without truth.¹

When talking about regimes of post-truth, I do not have in mind the herd instinct of journalists approximately 2-3 years ago with respect to the excessive use of the term "post-truth." Fortunately, this trend has passed. Here, I have in mind a significant cultural transformation which consists in the fact that the value of more and more numerous and less and less inter-related messages in the public space is not determined on the basis of the criterion of their truth, but on the basis of whether such messages are capable of catching our attention, stirring our emotions, and matching our convictions. Here, I would like to warn you against the book by Ralph Keyes entitled "The Post-Truth Era" of 2004. Even though Keyes was one of the promoters of the term "post-truth," he related it to the multiplication of lying practices. Thus, Keyes read today offers us completely erroneous clues. It is because post-truth (as we know it today) does not consist in lying (that is, a conscious negation of truth, hidden from the recipients), but in weakening or rejecting the serious treatment of the criterion of truth. As for this issue, the above-mentioned earlier text by Frankfurt (written in the 1980s) hits the nail right on the head. At that time, Frankfurt

analyzed the phenomenon of "bullshitting," that is, the phenomenon of formulating a message and simultaneously hiding the fact by the sender that it is all the same to him/her whether he/she is telling the truth or not. The notion of bullshitting also has features convergent with the phenomenon of post-truth, yet in the case of post-truth, the indifference to the criterion of truth also refers to the recipients of the message. Obviously, this does not negate the fact—at least in my opinion—that *parrhesia* is still very important, yet a normative idea, similarly to Foucault's belief. On the other hand, it would be difficult to treat the concept of *parrhesia* as an analytical category which would allow us to examine the more popular communication practices. Here, my doubts are very serious.

It seems to me that more accurate inspirations in the area of basic theses about cultural transformations may be found in the slightly forgotten concepts of Baudrillard, and in particular in his distinction between what is symbolic, that is, what is important for us, what gives us the feeling of sense, and refers to the seriously treated, collective symbolism, and into what is semiotic, that is, what is sent and received from the public space, without attaching importance to it. Here, we are dealing with the "implosion of meaning," the swamping of our civilization by ourselves with a mass of messages; the more messages, the less sense in them, and their significance for us is less and less frequent. As we know, Baudrillard argued with Foucault with respect to power; he believed that in post-modernity, relations of power are subject to virtualization. It is possible that today he would take a position different than Foucault's and the position sketched here, and he might conclude that not only are we dealing with indifference to the issue of truth, but also with the disappearance of *governmentality*.

¹ A more extensive explication and an attempt at justifying this thesis are contained in my article entitled "Governmentality without Truth" (in this issue).

It also seems to me that the reception of Bernard Stiegler would be very important; his idea of psychopower, the managing of our mentality, our attention, and in consequence the phenomenon of stupidity on a mass scale.

Thus, a need arises for a potentially quite risky synthesis of various threads deriving from different concepts. I am under the impression that the problem of power in Foucault's approach is very valuable and worth delving into, but I still believe that Stiegler's ideas about psychopower, and not only biopower, should be combined with it. On the other hand, as I have mentioned before, Foucault did not sense the direction of changes in culture correctly.

However, if we wanted to derive any form of normative ethics from the analysis of reality, then I believe that we could revert to Foucault via the category of *desubjectification* (*déassujettissement*), mentioned briefly in one occasional interview, and by referring it to truth-telling. I believe that uncompromising engagement in *parrhesia* is very often quite valuable. However, it is worth remembering that submission to authority is not necessarily placed on the opposite side. There is also such a value as tact. There is also such a value as a commendation of inconsistency. There is also such a value about which Foucault talks in a text about the identity politics of the gay community, and Wendy Brown progresses it: complete identification with a community important for oneself, with which Foucault identified, leads to being trapped in an intellectual rut and rigidity of action. Thus, the idea of *parrhesia* is also burdened with limitations: namely, when *parrhesia* becomes a community voice and is thereby subject to routinization and schematization.

Therefore, it seems worth searching for a synthesis of various threads, which, in my opinion, does not

necessarily lead to eclecticism, but rather to limited trust in certain authors. I would like to finish here.

Ewa Marynowicz-Hetka: While getting ready to speak, I once again started to look at various proposals of Foucault from the perspective of educational space, among others also reaching for the French edition of his lectures at Berkeley and discussions at this university (*L'origine de l'herméneutique de soi, Conférences prononcées à Dartmouth College, 1980* [2013]), as well as the interview with Michael Bess. It is known that the normative factor is very strong in education. It is also possible to put forward a strong thesis that, in principle, there is no education without a normative dimension. Thus, the question arises of whether it is possible to find any justification or opposition in Foucault's views in relation to the practice of truth in the educational space. This was the task that I set for myself.

Du gouvernement des vivants (2012) includes a very strong thesis about the examination of regimes of truth, which Foucault understands as relations linking the truth-revealing acts with subjects. If we assume that education, whatever happens in the area of education, is a certain set of actions, then, obviously, the subjects of these actions are very important, but particularly important are the mutual relations of the subject with whatever happens in such a space. If so, then while studying this public debate (*sur la vérité et subjectivité*) in Berkeley (23 October 1980), I noted with surprise that Foucault straightforwardly formulates such theses that sometimes seem too radical to me. For example, the category of stance and the category of non-obvious suspension of power are very clear in revealing the truth. Every time a subject appears here. In my opinion, this is also very interesting for a teacher who wants to develop such thinking. This is such a stance: this is me, this is me speaking, and thus I have the truth.

If this stance is transferred, for example, to the level of educational relations, then it seems to me that here we can treat it as a certain element of an analytical tool. Yet, my question is: could it be treated this way? First and foremost, due to the fact that in the French language (but not only there) there are three categories of “I”: *je* (I), *moi* (*ipse/ego*) and *soi* (I—*myself/idem*, or *selfhood* in Ricoeur’s translation into English [2003]). In reference to the relations between the regimes of truth with the educational space, this third category, *soi*, is very important, as it is related to the activity; it constitutes—as specified by Jean-Marie Barbier (2016)—the product of perceiving oneself as the acting subject. Foucault specifies what refers to *soi* and determines that I can also conduct myself. In response to one of the questions during the discussion in Berkeley, Foucault provides this example: as a father, I have a right to hit the child (as a side note, the 1980s, when it was still possible, are clearly noticeable here), but I do not do it, thence I influence myself. Here, I used the term influence, but in Foucault’s language, the term *conduite/conduire*, *conduire de soi-même*, is used, that is, to conduct oneself. Yet, I believe that in the mental or emotional sense, or the affective sense—because this is the most frequent type of acting—in this register, subjectivity (*subjectivité*) is understood as a relation to oneself (*soi à soi*).

I remember the discussions during our post-Foucault seminar when we analyzed Foucault’s category of subject. I saw this dilemma differently. While reading this public discussion with the participation of Foucault, I discovered where *subjectivité* (*subjectivity*) means the attitude to oneself, the conduct of oneself. This may be interpreted in a manner that my internal powers are directing me—my activities, my reactions. On the other hand, the relation of power is a relation between me (myself) and others.

So, here we have a very clear ethical dimension of this relation, marked very strongly at this moment. For example, it is said that knowledge is the relation between two persons. Obviously, in the sense that it has to be communicated somehow, it has to be uttered, but it also covers the entire scope of knowledge that is not uttered at all, non-verbalized. This set, these relations are never balanced. They are unbalanced by principle, says Foucault. If so, then the teacher can ask a question: then what about relations of reciprocity, which are so important in the educational space? For example, the *philia*, *partage*-type relation. In almost all educational texts—the classical ones—these categories are also emphasized in anthropological approaches. If we take, as the starting point, Foucault’s stance that the relation with the Other is always unbalanced, that it is often impossible to determine the status of its power directly, then subsequent problems will appear. We discussed this issue and we have probably concluded that this is not a linear sequence, but that there is always a certain junction, or—using the metaphor of Bogdan Nawrocyński (1947)—a braid of such intertwined situations and in this case also types of relations. But—as Foucault said—if we are using a phrase like: “I wish for,” or “I want,” we are already creating a relation of power. I think that this is a guideline for teachers, for entities operating in the educational space, as such situations are very frequent. Obviously, this is also included in the broad phenomenon of pedagogization.

One more thing: I do not want to take too long, but there is one thing that seems very accurate in the context of building relations with respect to potential further thinking. This is the third dimension of “I” about which Foucault talks, that is, *soi* (me-myself, *idem*, *selfhood*): when he says that it is revealed in the examination of conscience and in confession. When he talks about the genealogy of oneself, that

is a situation when I wonder what (and how) has changed. Somebody from the audience asks a question: is this (*soi*) a soul? And Foucault explains: no. This is a type of relationship where the human being as a subject may retain the relation with itself. We are not entering this level here. In this context, governing or management is a technique, Foucault says, which may be used for self-development, self-conduct, and leading people with the aim of domination. The main purpose is domination, which he introduces to the relation in a sophisticated manner, not straightforwardly. In any case, it is known that this is done through all the tactics and strategies that he talks about. Here, I am wondering whether this is already objectification; quite a lot has been written about reification, as well as commodification (fr. *marchandisation*) of relations, or maybe not yet: is it a certain unmasking of relations of this type, which constitute such desired relations in the educational space?

Maria Mendel: Dear Professor, after such a speech it is difficult to join this extremely wealthy reflection, and I am quite at a loss as to where to start. Professor Czyżewski greatly forestalled me. Things that have been said at the beginning have actually exhausted everything that I wished to talk about. So as not to repeat anything, I will talk about some other issues. The plan was that in response to the summoning of the panel on the politics of truth in the education of the public space, I would first draw attention to how the politics of truth in today's reality has been incorporated into such a formula of theoretical practice in which we are dealing neither with truth nor with actual politics. These threads were pursued in earlier speeches, and I will revert to them without completely abandoning this perspective, but I will start with something else, which is probably going to completely ruin my synopsis.

In 1967, Foucault wrote a brief yet well-known text about *heterotopia*, entitled "Of Other Spaces" ("Des espaces autres"). In the beginning, he claims that the time has come when great narratives are in the past: "the time of time" has passed, and we are entering the time of space. On the basis of this introduction, he constructs his stance about other spaces, different ones. It seems that when talking about the growing rank of space, he manifested great intuition. When we look at the vast expanse of repartition practices and the forms in which they are observed today, described by Foucault as organized management and manipulation of people consisting in their relocation already in *Discipline and Punish*; when we become aware that this process has become global, for example, in cities which become similar through the same patterns of expropriation supporting the accumulation of capital (as we talked about during the discussion yesterday, and a bit today in the lobby, referring to Harvey), then, definitely, Foucault is prophetically right. Yet, on the other hand, Foucault is slightly lacking intuition. He did not have the foresight to predict that the time of space would become the time of space of memory; that space would be dominated by the past time, which would absolutely format it. And this is happening in front of our very eyes; this is our "here and now." We create space on the basis of the "principle of the past," where the figure of return is of key significance. We are talking about the contemporary past's turn (or "U-turn"). It is easily noticeable that the return today organizes everything, including the past. Putting it forward as a thesis for our speech, I will also draw attention to two dates: 1997 and 2017. In 1997, Paulo Freire died, having handed over his last book, *Pedagogy of the Heart*, for printing. In 2017, Zygmunt Bauman died, and in this year his book entitled *Retrotopia* appeared, without him seeing a single published copy. These two dates, divided by twenty years, and the content of the books, make

you think when you try to look at today's reality dominated by the past from the social, educational, and political point of view. In his *Pedagogy of the Heart*, Freire raises the alarm: be warned of the future which is the past. Be careful of it. Build the future differently, not on the principle of return. We read Bauman's *Retrotopia* with a similar impression; already in the introduction, the author talks about the effect of return; about a stubborn return, which characterizes the contemporary flights to the future; about a return which—given the shared fear of what is going to happen—becomes the only way. Being afraid of the future, we prefer to return to what is behind us and rely on the construction of the common world on fear-based maniacal retro-activity. *Retromania* creates *retro-toposes*: culture, education, economy, society, about which we can primarily say that they have a past. Under the slogan of *retrotopia*, Bauman, in principle, describes what becomes the increasingly stronger, globally shared principle of social life in the face of the depth of the experienced crisis and blocking of the future as its consequence. Timothy Snyder in principle says the same both in *On Tyranny* and in *The Road to Un-Freedom*, while writing about the modern prevalence of “anti-history.” His notions converge with Bauman's in particular when he draws attention to how safe we felt in the neo-liberal formatting, believing that the future—subject to the same laws as the entire reality—was, to a significant degree, foreseeable. If the excellence of the principle of the free market was acknowledged, then, in consequence, this also encompassed the thought about the future. In brief, until the collapse of neo-liberalism on the economic level, that is, until the time of the crisis of 2008, we knew more or less what the future would be like, and in relation to this, we approached it without any greater fear. Yet neo-liberalism, with its unshakable faith in the free-market formula, has been quickly exhausted by the economic crisis. As Doreen Massey

claims, it persists on the ideological level, because it grew into our minds and hearts like an ethos, but the collapse of the vision of a better future supposedly guaranteed by the consequence of the dominant principle simply turned the axis, and it is no longer the future, but the past that is formatting our world today. In reference to our discussion, Doctor Maksymilian, is it not some kind of a formula of benefiting from the practice of enchanting the world anew? In defiance and in opposition to the constantly experienced infinity of the 19th-century project of modernization of the world? I am making an obvious reference to Weber's “disenchantment of the world,” in other words, also “the format” with respect to which both this neo-liberal project and the one that is implemented today came into being. So, possibly, the modern “enchantment” is the tightening loop of return, looping of the world towards the past. More and more ominous “war-smelling” nationalism is born out of this looping, somehow in front of our eyes, day after day. The only thing that we are capable of believing after the faith in a better world has collapsed is the faith in the re-born power of our own nation. Everybody knows Trump's slogans (“Make America Great Again”), Kaczyński's words about the “Great Jagiellonian Poland,” or Orban's dreams about the new power of Hungary. Emergency exits? While looking for them, we will reach for Foucault and education in the public space. The discourse of the race struggle, historically contextualized by Foucault—deriving not so much from its contestation, but from the bifurcation that took place in the 19th century—the discourse of the class struggle led the author to the conclusion that “society must be defended.”² During a lecture at the Collège de France on January 21, 1976, he said (I will take the liberty of presenting the full

² Foucault, Michel. 1998. *Society Must Be Defended. Lectures at the Collège de France*. Polish translation by Małgorzata Kowalska. Warsaw: Wydawnictwo KR, pp. 68-70 et seq.

quote, which is quite lengthy): “In other words, what we see as a polarity, as a binary rift within society, is not a clash between two distinct races. It is the splitting of a single race into a super-race and a sub-race. To put it a different way, it is the reappearance, within a single race, of the past of that race. In a word, the obverse and the underside of the race reappears within it. This has one fundamental implication: the discourse of race struggle—which, when it first appeared and began to function in the seventeenth century, was essentially an instrument used in the struggles waged by decentered camps—will be recentered and will become the discourse of power itself. It will become the discourse of a centered, centralized, and centralizing power. It will become the discourse of a battle that has to be waged not between races, but by a race that is portrayed as the one true race, the race that holds power and is entitled to define the norm, and against those who deviate from that norm, against those who pose a threat to the biological heritage. At this point, we have all those biological-racist discourses of degeneracy, but also all those institutions within the social body which make the discourse of race struggle function as a principle of exclusion and segregation and, ultimately, as a way of normalizing society. At this point, the discourse whose history I would like to trace abandons the initial basic formulation, which was: ‘We have to defend ourselves against our enemies because the State apparatuses, the law, and the power structures not only do not defend us against our enemies; they are the instruments our enemies are using to pursue and subjugate us.’ That discourse now disappears. It is no longer: ‘We have to defend ourselves against society,’ but ‘We have to defend society against all the biological threats posed by the other race, the sub-race, the counter-race that we are, despite ourselves, bringing into existence.’ At this point, the racist thematic is no longer a moment in the struggle between one social

group and another; it will promote the global strategy of social conservatisms. At this point—and this is a paradox, given the goals and the first form of the discourse I have been talking about—we see the appearance of a State racism: a racism that society will direct against itself, against its own elements and its own products. This is the internal racism of permanent purification, and it will become one of the basic dimensions of social normalization.”³ State racism “takes place” in a public space which—irrespective of the fact that it is retro-topical today because it is constructed according to the principle of return to the past—remains deeply educational. And the non-reducible element of thinking about education is its relational nature and location (*locus educandi*). Most generally, education is what happens “between” and “elsewhere.” These are the exact terms that may be used to describe the public space. Education is created in reciprocity, when every gesture in the established relationship meets with another one, deriving from the “other side.” Thus, for example, Gert Biesta writes about various forms of public education and “out of concern for the society” displays public education which seems to break—characteristic for state racism—the rule of searching for and identifying an enemy based on looped returns to the post-truths of the past. Such public education focused not on the formation of patriots by adjusting them to the specific, politically utilitarian mold, but on allowing for activities and fostering conditions for the emergence of individual and social freedom. This is education which, through, for example, Rancière-like interruptions, allows for breaking the ties which create a public space in a shape non-acceptable for a given individual or a group. This means entering into such relations which would be an expression of the possi-

³ Foucault, Michel. 1998. *Society Must Be Defended. Lectures at the Collège de France*. Polish translation by Małgorzata Kowalska. Warsaw: Wydawnictwo KR, pp. 69-70.

bility of acting and would offer a feeling of freedom. Such a break may form the subjective formula of being possessed by the past, described a moment ago. This simultaneously stops the modern state racism, which may be manifested in constantly competitive and infinite “standing out,” not so much of the race from the past, but the continually new past from the uniform, state race which is searching for an enemy outside of itself. Obviously, this is not a recipe, but it is worth noting that what I talked about we have learned from Foucault. Foucault is—once again and infinitely—educational.

Helena Ostrowicka: I would like to thank you very much for these inspiring voices. Before I hand over the microphone to other participants of our meeting, I would like to ask an open question pertaining to the discussion: to which degree may the category of psychopower, which was mentioned by Professor Czyżewski, be reconciled with the category of avowal, if we assume that avowal is the practice of being liable for speaking about oneself? Do we still, I believe that we do, live in a confessing society, as Foucault said one day? In such a case, aren't these elements from Foucault's lectures combined with the above-mentioned category of psychopower?

Marek Czyżewski: Should I say something?

Helena Ostrowicka: Yes. Please do.

Marek Czyżewski: In this case, I will try to refer to this issue on the spur of the moment. I have the impression that we are circling around the need for new terms. And your question, Helena, also seems to be leading to this issue. I will give you an example, which will (hopefully) illustrate what I have in mind. A long time ago, a book entitled *The Spectacle of History* was written by two ethnomethodologists: the

most important student of Harold Garfinkel, Michael Lynch, and David Bogen. The book was devoted to the sessions of the congressional committees investigating the famous “Iran-Contra” affair. In the context of analyzing the public hearings of this committee, which in any case resemble the sessions of our parliamentary committees, the authors state a thing that we are also familiar with: namely, such committees never reach the truth, and in any case—in spite of the fact they will talk about reaching the truth all the time, it is not about reaching the truth, but about assigning guilt, or impressing the public, or convincing somebody to change their opinion. In relation to this, Lynch and Bogen make a claim which seems to deserve greater attention than it was met with. This is about the concept of the pre-postmodern situation. According to the authors, we are living in a transitional period, when the actual cultural rules are partially different, yet on account of mental habits, we are still using the models of reasoning and categories which belong, to a great extent, to the past.

Both the idea and the practice of avowal, deriving from the Christian tradition, as well as the ancient and pagan idea and practice of telling the truth, require not only sincerity, but also compliance with the truth. *Parrhesia* is not only saying what is consistent with our own conviction; this would be insufficient. *Parrhesia* is also a recognition of the truth, as Foucault tells us in his Berkeley lectures. I play the *parrhesia* game when I know the truth and I have the courage to announce it. A question emerges: does such an idea and such practice have anything in common, for example, with modern posts on social networking sites or with posts on newspaper websites? Are confessions made on the Internet acts of truth? Provided these are actual confessions and not random confabulation and provided the author is the person whom he/she claims to be, and not somebody else. In

principle, it is all about making people pay attention to such posts; it is about the number of likes, thumbs up, or down, et cetera. It seems to me that regimes of truth or acts of truth-telling are still important, yet in limited fields of communication. These limited fields, where the message is evaluated in the category of truth, untruth, and lies, are located in a much broader cultural constellation, which comes under, I believe, some other cultural rules, where the criterion of truth is not significant. It seems to me that areas of struggle, a struggle for truth, for differentiation of truth from lies or falsification of reality are particularly valuable today. They show the importance of not following the trend, of speaking the truth, and of confirming the truth with one's own conduct. This is important in multiple areas, including here, in Poland—in education, in the church reality, and in any other reality. I do not wish to sound dramatic, but it is possible that in our times, now, these are particularly important issues, momentous, with a great burden of moral responsibility. Therefore, we should not lose sight of the fact that the general cultural contours have changed. In order to analyze the current cultural transformation, the discourse of truth must be put in inverted commas, and we must see that it is located on the tectonic shift of culture, which is, in principle, anti-Christian as it does not treat the truth and avowal seriously, and it is also anti-ancient because it introduces attention economy instead of truth-telling. And the fact that we, as individuals, experience the reality, sometimes poignantly, yet completely different, and we have our reasons for it, is another issue, which should not foreshadow the fact that apart from our sometimes painful experiences with the immorality or morality of this or another individual, group, community, or institution something else is happening on a broader scale. I would say, possibly too solemnly, that a civilization shift is taking place where such values in which we sometimes deeply be-

lieve and are ready to take risks for and testify for, are frequently instrumentalized. They become the symbolic resources for journalistic and political games. They are, we can say, used, reduced to rhetoric, but they are no longer the key cultural rules.

Helena Ostrowicka: Thank you very much, Professor. I would like to invite the rest of you to join our discussion.

Cezary Rudnicki: I have one remark with respect to Professor Czyżewski's standpoint. The interpretation of truth as a certain type of attention management caught my attention. I was not aware of such a thread; it seems very engaging. However, I would like to focus on Foucault because this is my piece of cake. I can see that Professor Czyżewski knows Foucault in depth; however, I am a philosopher who is greatly attached to terminological distinctions, and I am forced to argue with such arbitrary confusion of terms. For Foucault, avowal and *parrhesia* are not the same. Every time we tell the truth about ourselves, we do it differently, and the truth itself is of a different kind. Avowal is used to speak about one's memories, motivation, and intentions. On the other hand, we use *parrhesia* to refer to deeds which we actually carry out in life. It seems that we can find a lot of threads or terms in Foucault's writings related to the notion of truth, but they are very clearly distinguished from one another. Obviously, Foucault examines certain transfers and mixtures, but I tend to treat all of these as technical terms with very precise meanings. On the other hand, if we wish to look for the most abstract term, this is what I mentioned during my presentation. It seems that the most abstract manner in which Foucault approaches the truth is to interpret it as a combination of two orders: the spoken order and the order of the visible. During your first speech, you mentioned some tools for analysis, which we are sup-

posed to find in Foucault's writings. It seems that this is where the analytical potential is embedded. If we examine various systems paying attention to how the discourse is constructed as part of such systems and the visibility structures that are guaranteed, then we will be able to specify how, as part of such a device, or, if you wish, *dispositif*, truth is understood. For example, when Foucault examines disciplinary societies, he shows that truth there—he still uses the term knowledge—that knowledge there consists of a spoken order, which is an order of regulations and codes, and on the other hand, of a certain order of visibility, primarily architecture, which shows the individual that is located in a subordinate position and hides the ruler, who is in a privileged position. It seems to me that this is the abstract tool, the examination of these two orders and the modes in which they are combined, which may be matched to various devices, various spheres of phenomena, and analyzed thanks to this. I do not know what the situation would be like in the case of modern post-truth. Definitely, it is possible to examine some discourse; it is definitely possible to examine some visibility of those who are using this strategy, but I admit that at the present moment, I do not have an idea how the two could be tackled. Hence, only this concise commentary.

Marek Czyżewski: I will speak very briefly. Thank you very much for these remarks. To what degree does the difference between the spoken and the visible outlined by you help us in analyzing what happens as part of cultural and civilization transformations? Partially it definitely does, but it probably misses the intuition that I have mentioned here several times. I also have an impression that the term “spoken” in comparison with the “visible” leads us to the issue of pre-postmodernity. Isn't it the case that the uttered/visible difference is embedded in the mental horizon related to the category of truth? And

I have already mentioned the over-valuation of the role of truth. Thank you very much.

Helena Ostrowicka: Several threads have appeared in our discussion. Who else would like to speak?

Ryszard Mordarski: I have a question for all of you, which I would like to ask from a slightly more conservative perspective. Are we, living in these modern societies that have clearly been formatted in a neo-liberal mode, not aware that in a certain manner we have already used up all the possibilities, that there is no other move to be made, there is no new alternative? For instance, all the possible games that we could still play have already been played and are beyond us. In this context, one of the key representatives of post-modernism, Zygmunt Bauman, who entitled his last book *Retrotopia*, speaks up. In a sense, this title symbolically shows the entire situation of exhaustion, even closure of the project of modernity, and slightly teasingly proposes a departure from this situation, offering a return to the past, a focus on the return to what has passed, and re-thinking it anew. Hence, the popularity of all the identity stories today, which are a new method of building the subject, after Foucault's death, of the subject. I would like to refer to what you said, that it will not be possible to build it in a Cartesian way, but we may possibly succeed in some “new” manner, by searching for some personal threads or extensions running into the future and not the past. This would be, to a certain degree, some turning point in post-modernism where the awareness of disappointment with the future and progress is growing, whereas interest is awakened in a return to tradition and its creative exploration. In your opinion, could there be some conservative element in contemporary post-modernism, which emerges from a noticeable disappointment in such experiments as, for example, the death of the subject?

Maria Mendel: Exactly, I think that we are close to capturing some key sense here... And what you are personally looking for is possibly educational activities in the public space; interruptions of this and not some other shape of relations which we have established and which, in the course of time, have assumed a non-acceptable form. It is important to continue to work for the critical distance enabling articulation of this type. Thank you for this voice.

Ewa Marynowicz-Hetka: I think, that is, I am convinced that insofar as we analyze the past, it is—pardon my expression—useful for us; it explains something to us in the present, and possibly also gives us some elements, some intuition with respect to the past. Simply—it only seems to me—not the past for the sake of the past, analyzed only when it is necessary. There are definitely some disciplines that are only dealing with it, but when we look from the perspective of education, the methodological formula of Gaston Bachelard (2002) fits best, in my opinion.

Ryszard Mordarski: And what about analysis of the past as a method for building a personal identity? In such a case, does the past become something valuable in itself, as—to a certain degree—“objective” material, which is meant to provide the “resources” for understanding oneself?

Ewa Marynowicz-Hetka: I am not sure if I can answer.

Maria Mendel: I will answer with Ricoeur: what we create, our narratives, visions of ourselves and the world, individual identity profiles or social profiles, are all fiction. In them, we find our “own” paths of being in the world, existence in the world, and for the world. Maybe this should simply be accepted, and productive constructs should be built on fiction. Today, fearful of tomorrow, has the opportunity to

change in these conditions. However, I see a problem elsewhere. WHAT fiction can be pieced together from such bits of the past? What does it say about us today? We who are—metaphorically speaking—opening the door to the future world, where we will no longer be present, only our traces, our heritage, will be there. At the same time, the key issue is: what are we going to say to those who are behind us? Derrida emphatically claims that we are obliged to give testimony, to respond to the spirits that visit us through the traces that we also perceive in ourselves. He emphasizes that we have to do it in the name of justice. For those who are no longer alive, for those who have not yet died, and for those who have not yet been born. This is where the past, the present, and the future are contained. The atmosphere has almost turned church-like. So maybe I will no longer talk about why the return to the past may indicate that we are living in a confessing society.

Helena Ostrowicka: Many questions were asked today and in the course of this panel. These are difficult questions pertaining to education and public space. We have been talking about education since yesterday, referring to Foucault and other non-Foucauldian terms, and we will probably be left with such questions. Would you like to add something at the end of the panel? Professor?

Marek Czyżewski: I really do not know why I should be the one to say something now.

Helena Ostrowicka: We barely heard you yesterday...

Marek Czyżewski: Really, thank you very much for this privilege, but this is also some kind of trap because it is difficult to deliver such a “sermon” now.

Helena Ostrowicka: How about saying something optimistic?

Marek Czyżewski: Optimistic?

Helena Ostrowicka: Yes...

Marek Czyżewski: I am not so sure. Since the problem of education has been mentioned, let us take a look at the changes that we are observing, and to which we have, to a significant degree, fallen prey, or which we have perpetrated. In the educational system, at various levels, including in university education, we are starting to live in the fumes of fiction and absurdity. Committees for the quality of teaching operate at every faculty, which are in practice hiding the fact that the quality of teaching is dwindling year by year. Research projects are multiplying, as part of which we often write various things which are, to a great degree, a promise that cannot be fulfilled. New legal and administrative regulations put us in a reality which we also know from other systems and which induce us, I believe so, to choose the traditional path: on the one hand, there is the official, illusory, and, to a certain degree, hypocritical reality, and on the other, there is the truth about such reality. In the previous system, it was impossible to utter such a truth. Now you can do it, but it does not change anything. This is what the difference is about. Nothing bad will happen to us for joking about the authorities, and let's hope that things will stay this way. But, still, this does not change anything. Everybody can say whatever they want to. It seems to me that the reality that surrounds us in the realm of education plainly pushes us to the issue of the politics of truth. It seems to me that in this area of communication the rhetoric of truth, untruth, and lies is continually applied. Yet the basic difference is between how people explicate the reality, that is, what Garfinkel called accountability: which categories and methods are used by peo-

ple to interpret a situation, to make it comprehensible for themselves and for others. This is one issue. Another issue is the analysis of the accountability process. I believe that new analytical categories are necessary here. It seems that education is an area in reference to which such categories as: hypocrisy, absurdity, incompatibility with common sense, falsification, self-falsification, pursuing a dubious career, media authority (as distinguished from scientific authority) come to mind. In this area, we are painfully confronted with what is called illusion and with what is called truth. Yet, do we actually explain the reality with the use of such categories as illusion and truth? Or are such categories the tools that we use in order to make the reality comprehensible to ourselves and to others, and we apply such categories because we know them because we have been given them by the cultural tradition—in spite of the fact that maybe something else is happening in our environment which requires a new analytical language, a meta-language allowing for the analysis of the process of accountability. I will only mention one of the possible paths here. It would be worthwhile to check the usefulness of the concept of apparent actions developed by Jan Lutyński in reference to real socialism with respect to the analysis of the functioning of the modern educational system in Poland. It must be added that the identification of apparent actions requires reference to the categories of truth, untruth, illusion, and lies. Therefore, it might turn out that on account of the development of the phenomenon of post-truth, the diagnosis could also be searched for with the use of neo-apparent actions.⁴ But, this is partially a separate issue.

⁴ Cf. Jan Lutyński. 1977. "Działania pozorne [Apparent Actions]." *Kultura i Społeczeństwo* 2:69-78; Marek Czyżewski. 2009. "Neo-Apparent Actions. Some Remarks on Changes of Public Communication and Academic Life." *Przegląd Socjologiczny* 4:9-30.

Helena Ostrowicka: Thank you very much, Professor. Such “truth-related” vocabulary may be enhanced with the so-called “tapes of truth”—a tool which is applied for various purposes and in various contexts, and which shows that the role of what

was said changes significantly, depending on time and place. Thank you very much for your participation in the panel and the discussion.

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Archeology as a Metaphor in Contemporary Culture

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Abstract: The scientific discipline of archeology has gone through various stages of its development and improvement of research methods. First, it was combined with ancient history and the history of art. In the mid-nineteenth century, the base of its chronology was on biblical events. Modernist archeology of the twentieth century focused on classifying monuments and reconstructing cultural processes. In the second half of the twentieth century, archeology inspired other disciplines of culture and science to “stratigraphically” look at their own history. In this way, the stratification of scientific thought (archeology of knowledge), the history of photography (archeology of photography), and the media (archeology of media) began to be analyzed. Archeology has become a cognitive metaphor in contemporary culture. Lack of knowledge of the theoretical and methodological achievements worked out by archaeologists may, after some time, lead to the trivialization and petrification of the archaeological metaphor, although today it still seems fresh and innovative for “archeology of media,” “archeology of photography,” or “archeology of modernism.”

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nych międzymorza bałtycko-pontyjskiego (*Red Ocher and Grains of Cereals. The Symbolism of the Revival of the Dead in the Funeral Rites of Archaic Cultures of the Baltic-Pontic Intermarium* [2005]), and *Archeologia kamieni symbolicznych. Od skały macierzystej do dziedzictwa przodków* (*The Archeology of Symbolic Stones. From Bedrock to Ancestral Heritage* [2014]). Jacek Woźny is the Rector of the Kazimierz Wielki University in Bydgoszcz for the second time (2016-2020, 2020-2024). He is the head of the Department of Ancient Archaeology and Ancient History of the University of Kazimierz Wielki in Bydgoszcz.

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Against the background of the study of the condition of contemporary archeology, the words of Bjørnar Olsen (2013:9 [trans. JW]) sound original, who in 2010 stated that “Archeology, as a term, has become a popular and even abused phrase among philosophers, psychologists, sociologists, and literary scholars. However, few of them, fascinated by the metaphorical bearing capacity of the word, bothered to seriously consider what contribution archeology could have in solving their problems.” It is worth attempting to explain why culture studies and representatives of other humanistic and social disciplines do not notice the theoretical achievements of contemporary archeology, while archaeologists are not interested in using the name of their discipline in contemporary humanities (Minta-Tworzowska 2015:21-37).

Edmund Husserl formulated the thesis that the view of prehistory opens our own present. The cognitive subject is not only determined by history, but they determine it themselves. The past in this sense permeates the present, is subject to ordering and evaluation according to our own criteria, and not the principles used by the societies and cultures constituting the subject of our study. An analogical specificity of looking at artifacts from the past characterized all previous generations and cultural traditions (Mamzer 1997:38-41). A reflection on this issue creates an opportunity to explain the presence of archeology as a metaphor for studying the past, used in contemporary culture (Olsen 2013:8-9).

The Transformation of the Cognitive Status of the Metaphor

The introduction to this, however, is to determine the transformation of the cognitive status of the

metaphor. In traditional rhetoric, the metaphor is classified as a *clue*, that is, as one of the figures distinguished according to the criterion of a specific modification of meaning in the use of words. In Aristotle's *Poetics*, we read that the metaphor consists of the transfer of a foreign meaning to the name. Cicero and Quintilian wrote that the metaphor is simply a shortened comparison that does not add new information about reality to the discourse (Ricoeur 1989:126-127). The rationale of classical rhetoric has been questioned by contemporary semantic analysis of metaphors, represented in the works of such authors as I. A. Richards, Max Black, Monroe Beardsley, and Philip Wheelwright. Gilbert Ryle said the metaphorical expression is about revealing the association where there is no relationship from the colloquial point of view. Through this apparent misunderstanding, a new, previously unrecognized, semantic relation between the terms is established so that the current classification system is ignored or which it did not allow. Two classes of meanings, so far distant, are suddenly put together: the action of similarity, in this case, consists in grasping the closeness of what was previously not compared (Ricoeur 1989:131).

The description of the role of similarity in metaphorical expressions results in a further reservation in relation to the rhetorical concept of a metaphor. In classical terms, it was based on simply replacing one word with another. On the other hand, the contemporary theory explaining the metaphor through the semantic tension reveals the emergence of a new sense that embraces the whole sentence. A metaphor is more like a solution to the puzzle than a simple association based on similarity (Ricoeur 1989:132-133). At least two basic points, therefore, discern the contemporary approach to metaphor from the one cultivated by classical rhetoric. First of all, the metaphor

is no longer a clue based on a word or name, so it is not just a denominational operation. Secondly, the contemporary approach does not support the concept that recognizes the idea of similarity between the replaced names as a constitutive property of the metaphor. A metaphor can be treated as a rhetorical, literary, and poetical concept, but it can also be perceived in a context that makes it an epistemological category. This is how it is qualified by philosophical new rhetorics, logical grammar, and hermeneutics. In their light, the notion of metaphor assimilates the findings of post-positivist epistemologies, first of all, the problems of explaining and modeling, as well as the problems typical of anti-positivist currents in reflection on science (Wrzosek 1995:26-29). These problems are particularly important when humanistic or social disciplines reach for the “metaphor of the archaeological site,” but do not declare methodological sources of their decisions (e.g., *Archeology of Transformation: Gender War in an Intersectional Perspective—Museum of Modern Art in Warsaw* [<https://artmuseum.pl/pl/wydarzenia/archeologia-transformacji-wojna-o-gender-jako-archeologiczne>, retrieved March 25, 2019]).

The Paradigms of the Main Trends of Archeology

In the mid-nineteenth century, archeology was combined with other humanistic disciplines, accompanied by the objectification of the past, because it was contrasted with the life and times of nineteenth-century prehistorians (Mamzer 1997:39). At that time, it was believed that prehistory is the source of contemporaneity. Today’s methodology recognizes our creative role in attributing content to old artifacts (Olsen 2013:11). The nineteenth-century archeology focused on the visible traits of discovered things and objects, striving for a universal system of their

periodization (Hensel 1983:48-49). At that time, the genetic metaphor predominated, proving that all observed phenomena in the world of nature and culture have their sources in the past (Renfrew and Bahn 2002:24-25). The nineteenth-century paradigm of ethnogenesis and the related problem of the origin of Slavs and Germans is still the main driving force of Central European archeology (Mamzer 1997:41-42).

Modernist archeology shaped in the twentieth century created a model of science that seemed a universal paradigm of humanities (Mamzer 1997:14). According to Witold Hensel’s (1983) opinion from 1972,

we will give meaning to archeology most accurately if we state that it deals with uncovering, mainly by means of excavation methods, sources of the past and their scientific registration and evaluation...This character is combined with its function in the field of reconstruction of economic, cultural, social, and political relations. In other words, archeology is used for all branches of science whose aim is to recreate a part or the whole of the historical process...The scope, research goals of archeology, and its place in the family of other sciences are...clear and qualify it as a discipline serving to learn about the past, and at the same time serving to shape the future...None of the most interesting theoretical concepts can replace the knowledge resulting from a concrete knowledge of facts. [pp. 13-27 (trans. JW)]

While the entire archeology of the first half of the twentieth century was influenced by cultural and historical archeology, the subsequent decades have resulted in the development of the so-called New Archeology, Marxist and Neo-Marxist, and structural archeology (Marciniak 2012:32-64). The development of archaeological subdisciplines determined

the multiplicity of topics currently considered as “archaeological”:

starting with the analysis of the material culture of early hominids, through the reconstruction of the beliefs of archaic societies or the formation of the first civilizations, and ending with judicial archeology or the mechanisms of consumption in modern cities... The attempt to define the thematic scope of archeology is hindered by the fact that the conceptual network is imposed on a cultural reality that is continuous, flexible, and changing over time. This variability concerns both the analyzed reality itself...and the disciplines dealing with it, usually with overlapping fields of research interest. [Cyngot and Zalewska 2012:193-194 (trans. JW)]

The paradigms of the main trends of archeology in the second half of the twentieth century often coincided with the leading directions of humanistic thought, such as the idea of cultural process, behavioralism, cognitivism, antagonistic visions of the world, cultural codes structure, and others (Marciniak 2012:39-64). Researchers have turned to culture, looking for universal content that functions in all communities (Domańska 1997:65). New branches of archeology appeared and became active, such as archeology of everyday life, consumption archeology, death archeology, symbolic archeology, landscape archeology, and many more. All of them are looking for new, non-classical metaphors for thinking about the past, getting rid of the burden of the current paradigm of prehistory as a stratigraphically recorded sequence of events, perceiving it by the similarity of overlapping processes and cultural changes (Minta-Tworzowska 2015:32).

The transformation of archeology in the postmodern trend led to the abandonment of the modernist

model, whose main construction axis was a metaphor of progress, unifying prehistoric reality.

Post-modernity assumes...a completely different structure of the research field than in the case of the modernist history of civilizational progress...Thus, every examination of past reality means...exclusively evocation, that is, the invocation of such a reality as it is of significance to us today. [Mamzer 1997:15-16 (trans. JW)]

According to Dorota Cyngot, in the post-modern world, the very concept of “archeology” is becoming more and more often a metaphor for various fields of knowledge and everyday life, indicating the direction of the search for beginnings, origins, and roots. Michel Foucault used such comparisons in his “archeology of knowledge,” as well as “archeology of medical examination,” and “archeology of humanities.” They were followed by other metaphors built in non-archeological discourses by other authors: “archeology of photography,” “archeology of music,” up to “spiritual archeology” or “archeology of subconscious,” encountered in contemporary essay writing and fiction. Expanding and crossing interdisciplinary boundaries means that in relation to some phenomena in the field of what is currently referred to as archeology, one may wonder how much this use takes on a metaphoric character and what it actually means (Cyngot 2012:799).

The Perspective of Cultural Memory

A clue that can lead to the explanation of the tendency of using archaeological metaphor outside the primary research domain of this discipline is the perspective of cultural memory. There are more and more supporters of a thesis about a growing bloom of remembrance and memory, which would

signal equally important changes in the humanities as earlier, modernist phrases: linguistic, spatial, or pictorial (Saryusz-Wolska 2009:7). Jan Assmann (2009:69 [trans. JW]) stated that “thinking is based on abstraction, and remembering—on particulars.” Ideas must gain material expression to become objects of memory. From mutual interpenetration of concepts and experiences, the so-called figures of memory are created. Their specificity is determined by three characteristics: a specific reference to space and time, a reference to a specific group, and reconstruction (Assmann 2008:53-54). It is easy to see the similarity of memory figures to some research paradigms of archeology.

On the one hand, as a result of their cognitive activity, archaeologists restore (in social/research awareness) what escapes historical consciousness, which is often unconscious. On the other hand, recalling the memory of the past, extracting knowledge about it to the light, showing what is invisible or unclear by itself, is done at the expense of physical destruction or decomposition of the message itself, created in the post-deposition/stratification process. [Cyngot and Zalewska 2012:199 (trans. JW)]

To indicate the essential features of social-cultural memory, reference should be made to the characteristic places and artifacts that designate it. Cultural memory is based not only on written messages, “but also on dances, games, rites, masks, pictures, rhythms, melodies, decorations, weapons, et cetera, which are...intense forms of self-perception and self-reliance of the social group” (Assmann 2009:92 [trans. JW]).

The “contemporary offensive of memory” (Le Goff 2007:105) is based on many media, among which memories and biographies play an important role

(Saryusz-Wolska 2009:35). Autobiographical memory reaches “without difficulty to the existing elements of reality, which—from the perspective of the present—seem to ‘fit’ into their own past” (Welzer 2009:57 [trans. JW]). An interest in memory and the continuation of the past also increased in archeology as a scientific discipline.

Contrary to romantic and modernist ideas, archaeologists do not discover the past, but work within the past that is in the present...The archaeological site is truly disordered; it consists of a palimpsest of structures built in different periods...These are places that do not fit into the dreams of modernity or historicism about the completeness, order, and refined time. [Olsen 2013:197 (trans. JW)]

Since the changes in the fate of things in culture result from the selective memory of the past, it was proposed to study biographies of individual artifacts. According to the ideas of Igor Kopytoff and Bjørnar Olsen, objects have always been associated with society in various ways. Analysis of the biographies of selected artifacts is also a study of the communities in which they were used (Iwaniszewski 2012:276).

In addition to the solidity brought by things in everything that we have learned to think of as social and cultural, they allow us to obtain yet another closely related result: the gathering or embedding of the past. The past is not left behind, but patiently gathers and arranges into what we conveniently call the present. [Olsen 2013:263 (trans. JW)]

In a novel way, Marta Raczyńska applied these concepts in contemporary Polish cultural anthropology. In her book, *Czas uwarstwiony na gąsawskim poddaszu* [*Time Stratified in the Gąsawa Attic*], the introduction

of the archaeological metaphor of “temporal layers” and an attempt to look at the attic as a representation of stratified memory have made this report a peculiar story about the relationship of the inhabitants of Gaśawa with their past: family, home, and also having a local dimension; a past that can be learned through memorabilia, as well as ordinary “junk” (Raczyńska 2016).

The Analysis of the Contexts of the Use of the Archaeological Metaphor

There are at least a few non-archeological examples of the use of “stratigraphic” analysis of the achievements of a given field of culture or science investigating the accumulation of its achievements and concepts, from the beginnings to the present day. One of such projects was created by Jerzy Lewczyński, an artist distinguished for post-war Polish photography. Since the late 1960s, he has achieved his own individual style, full of references to amateur photography, the world of childhood, found negatives and prints, which in the 1990s included in his original concept of “archeology of photography.” He called it “activities, the aim of which is to discover, study, and comment on events, facts, situations happening in the so-called photographic past. Thanks to photography, the continuity of visual contact with the past creates opportunities to broaden the influence of old cultural and creative layers on today’s” (trans. JW [https://culture.pl/pl/wydarzenie/jerzy-lewczynski-archeologia-fotografii#, retrieved December 20, 2020]). On the basis of Jerzy Lewczyński’s concept, in 2008, the Archaeology of Photography Foundation was created, protecting the legacy of photographers and disseminating knowledge about the history of Polish photography in the form of a special archive (see: faf.org.pl/strona/gmuranowska144.pdf, retrieved December 20,

2020). The archeology of photography is looking for manifestations of the existence of this field of creativity at all stages of its development. It has strong support in the photography philosophy of Vilem Flusser. According to him,

we have witnessed two fundamental turning points in the history of mankind: the first was associated with the invention of linear writing, the second with the invention of technical images. The first technical picture was a photographic image, therefore attempts to explain the phenomenon of photography are at the same time attempts to understand the basic changes that are taking place in the modern world. [Flusser 2015:17 (trans. JW)]

Just as the memory recorded in images is important and archived in the project of the Archeology of Photography Foundation (see: faf.org.pl/strona/gmuranowska144.pdf, retrieved December 20, 2020), the performative program “Body Archive” has significant cognitive value, which was termed “archeology of dance.”

Choreographers become a kind of archaeologists who keep their excavations in the reservoir of cultural memory. Their purpose is to extract from the past “the products” of the works of their predecessors. However, their task is slightly more difficult than for historians or real archaeologists, because the specificity of dance and theater is the lack of material products of the activities of actors/dancers and directors. A void remains in the place of the original...[How to deal with it? There are several ways,] one can search for traces and try to reconstruct the works of your predecessors in one’s own way. Sometimes original works can be recreated... Sometimes it is much more inspiring to experience the choreography process itself than to reconstruct it. [Juźwik 2014-2015:24 (trans. JW)]

In this respect, discovering the historical stratigraphy of the history of dance corresponds to the concept of archeology of knowledge of Michel Foucault. He stated that this archeology “does not try to restore what could have been thought, wanted, intentional, experienced, or desired by people at the moment when they spoke the discourse...It is nothing more...than a rewriting...of what has already been written” (Foucault 1977:173 [trans. JW]).

A fundamental role in the implementation of the “Body Archive” project plays on the idea of the cultural memory, present in contemporary humanities and archeology.

It turns out that the human body can also become “a storehouse” of what man has remembered in the entire experience of reality. Social and political events also (in a sense) determine the memory of the body. It is not only the imitative presentation of movement exercises, but also presents the sensual world of a man who functions in a given culture...What is happening in the reality that surrounds us has an impact on how our body reproduces, what our movement memory is. [Juźwik 2014-2015:29 (trans. JW)]

Similar concepts are used in artistic multimedia projects that refer to the values of the human body. In the “War on Gender” exhibition at the Museum of Modern Art in Warsaw, Ewa Charkiewicz used a metaphor of the archaeological site, where the layers are removed, the heterogeneous elements exposed, and the relationships sought between them, to reveal how the darkening and masking of the gender/power relations were organized in discourses about family, equality, and anti-discrimination (see: <https://artmuseum.pl/pl/wydarzenia/archeologia-transformacji-wojna-o-gender-jako-archeologiczne>, retrieved March 25, 2019). In the field of contemporary art,

Mirosław Bałka used the same aspect of archeology. When creating his works, he emphasizes the role of the memory of things. What is important to him is private archeology. The artist thus finds “archaeological sites” in both his own and collective memory (Delikta 2018).

“Archeology of photography,” “archeology of dance,” and other artistic activities help to reveal the layers of cultural memory and archive achievements within particular disciplines. Memory constantly adapts the retained knowledge to the requirements of modern times. In this way, a balanced relation between memory and forgetfulness is ensured, while the historical build-up of various approaches to media and memory implementation is called “media archeology,” understood as the sum of cultural studies and research on media history and ethnology (Butzer 2009:195-199). Siegfried Zielinski recognized that its predominant goal is to constantly find the New in the Old.

How can an object that is still so new be attributed to archeology? Media, technically and culturally complex systems, have existed...only for half a century... The individual devices for communication, listening, and seeing, in which technical means and instruments were used, are much older...Their origin and improvement should be connected with times much earlier than the 19th century. In that century, the telegraph, telephone, photography, and cinema became objects of general use and industrial production. However, the ideas and concepts that inspired these communication techniques send us many years back. The research attitude that emerges in this way can be called a paleontological attitude. Similarly to the most advanced researchers of our planet Earth who, in their tireless search, do not accept any granite layer, through which they would not be able to break

through to even older evidence of its existence, also we do not stop at the time of the explosion of communication technologies of the industrial era. [Zielinski 2010:IX-XI (trans. JW)]

This attitude is currently gaining new supporters. “The increasingly popular position of media archeology requires...searching for older works, undiscovered by literary scholars, often carried out by visual artists, filmmakers, creators testing various media (from the film, through books, to computers), or computer geeks operating in Poland in the 1980s and 1990s within a framework of demoscene” (Żuk Piwkowski and Marecki 2014:98).

Exploratory activities are even carried out on YouTube.

Of course, talking about the archaeological function of YouTube is only a metaphor. Recalling archeology in the context of the website, however, better describes the observable trend, in which specific archival resources (fragments of films or even little-known videos from many years ago) are discovered and brought back to life after years of oblivion. Just as an archaeologist discovers forgotten artifacts, bringing them to the surface and transferring them to museums, where thousands of people watch them, the YouTube infrastructure identifies and promotes films from many years ago. [Wilkowski 2009 (trans. JW)]

In this situation, a clear similarity between the two conceptual strings is created: Archeology-Artifacts-Museums-Viewers and Internet-Movies/Texts-YouTube-Internet users.

Media archeology should not be confused with archeology as a discipline. When media archaeologists say they are conducting “excavations” of

media and cultural phenomena, this word should be understood in a specific way. Media archeology deals with both text, visual, and audio archives, as well as collections of artifacts while stressing the discursive and material aspects of cultural products. Its research smoothly passes between disciplinary boundaries, which allows one to move freely in the field of humanities and social sciences, and to look into fine arts. Media archeology is rooted in a deep distrust of dominant historical narratives, which brings it closer to the practice of new historicism. According to the creators and representatives of this discipline, archeology, unlike history, refers to what really exists, what remains of the past in the shape of archaeological layers present in technologies. Thus, media archaeologists are trying to discover—or rather dig out—what is hidden under historical narratives, revising artifacts to show previously unseen connections and interruptions (Maryl 2014). In this respect, the use of a metaphorical expression revealed connections where colloquial seeing did not see any relationship. Through this seeming misunderstanding, a new, previously unrecognized, semantic relation was established between the terms that the current classification system of sciences ignored, as Paul Ricoeur predicted in his hermeneutics of metaphor (Ricoeur 1989:124-133).

The currently developing field called media archeology seems to follow the path delineated by Michel Foucault—“the last historian, or the first archaeologist” (Maryl 2014:189 as cited in Kittler 1999:5). In the concept of Michel Foucault, archeology is a metaphor for research on the stratigraphy of discourses. This philosopher proposed designating the field, which he created by the name “archeology of knowledge,” as a synonym of discovering something hidden. Following Gaston Bachelard, he most probably wanted to express his perspective on the history of

science through the prism of “cuts,” “thresholds,” and discontinuation, which accompany classical archaeologists in research. The Foucauldian archaeologist should dig into unconscious forms of thinking, taking off layers of elementary discourse units, such as statements (Topolski 1977:5-21). Michel Foucault’s theory is constantly updated.

The concept *archailogia* contains not only the old, the original (*archaios*), but also the activities of governance, domination (*archein*), as well as the noun *archos*, the leader...In the discussion of Foucault’s concept of archaeology of knowledge...Rudi Visker used the name *An-archeologie* to describe a method that could not be refocused by any reference to the identification potential of a unified object of original experience...Wolfgang Ernst used the term *Anarchäeologie* in another interesting sense: as an opposing movement to excavation and uncovering. [Zielinski 2010:37 (trans. JW)]

An overview of the contexts of the use of the archaeological metaphor indicates their limited systematics. We find descriptions of “waste and debris of past historicism in modernism from the beginning of the 20th century as if it cited prehistory” (Rejniak-Majewska 2017:153 [trans. JW]). The “pre-history of culture 2.0” is mentioned by analysts of new media and digital technologies (Filiciak and Tarkowski n.d.). In the analyses of the conceptualization of the concept of “text” and the transformation of thinking styles in literary studies, “archaeological or detective investigations serve to restore the whole and reach the perpetrator. This whole is always concrete and has a specific author” (Jarnicki 2014:181 [trans. JW]). The literary study of Bruno Schulz’s forgotten text *Lilien* is called the “archeology of Polish-Jewish modernism” because, like archaeology, it discovers something that has disappeared from the minds of readers (Underhill 2016:656). In addition to the “excavation” metaphor, concepts of “tem-

poral layers” (Raczyńska 2016), “archeological sites” (Delikta 2018; <https://artmuseum.pl/pl/wydarzenia/archeologia-transformacji-wojna-o-gender-jako-archeologiczne>, retrieved March 25, 2019), or “forgotten artifacts” (Wilkowski 2009) are also used.

Conclusion

Retrospective studies of Michel Foucault, Siegfried Zielinski, Wolfgang Ernst, Rudi Visker, and others, consisting in the search for the identity of specific problems, starting from the situation found by the researcher, culturally diverse to a uniform, even culturally homogeneous reality located lowest in prehistory, is “stratigraphic research” for which archaeology is a handy operational metaphor (Mamzer 2004:205). Unfortunately, they are based on the traditional understanding of this discipline and do not use the semantic potential contained in the non-classical concept of metaphor, used by contemporary historiography and archaeological theory (Wrzosek 1995:29-30). It should also be emphasized that they refer to the classical, banal “stratigraphic” metaphor (Wrzosek 1995:30), while archaeology followed the modern theory that explains the metaphor through the semantic tension between two terms (Ricoeur 1989:132-133). Referring to Shanks’s comparison of the development of archaeology with a growing tree, culture studies, philosophers, sociologists, media experts, and other researchers reached in their metaphors for the excavational “roots” of archaeology, but they did not notice a solid “trunk” of data synthesis and processing, “branches” of interpretation, and, above all, the tangled and ever-growing “branches” of new scientific theories and approaches (Minta-Tworzowska 2015:21-37). The inspiration for asking questions two decades earlier about the place and role of archaeology in contemporary humanities was an attempt to assess the importance of this dis-

cipline against other sciences about the past and the desire to reflect on the causes of the increasingly widening gap between archeology and contemporary humanities (Ostoja-Zagórski 1997:6-9). Since then, many subsequent debates have been conducted, important collective publications have been published (e.g., Tabaczyński et al. 2012), and monographic ones (e.g., Mamzer 2004). Among other things, it comes to the conclusion that since the birth of this discipline

of science in the mid-nineteenth century, through subsequent stages of its biography, archeology has reached the multitemporal present and has become a way of thinking about the past in the non-archeological fields (Kobińska 2016:6). The limited use of the “archeological” metaphor in contemporary culture may, however, lead to its banalization and petrification after some time, although it still seems fresh and innovative today (Wrzosek 1995:29).

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Governmentality without Truth: An Essay on the Role of Foucauldian Thinking in a Post-Truth Society

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Abstract: Considering the issue of power in Foucault will always lead to comments on the issue of knowledge and *vice versa*. What I suggest in this paper, however, is to look into both topics presented in the work by Foucault separately, at least to a certain extent. I believe that the evolution of these two threads in his works allows us to evaluate their suitability differently as far as their relevance to contemporary culture is concerned. Foucault's approach to the issue of power and its evolution towards so-called governmentality is evidence of how accurately he sensed the direction of changes to the *Zeitgeist* of Western civilizations, a fact which cannot be said about the evolution of Foucault's approach to the issue of knowledge, leaning towards the question of truth and truth-telling. The aim of this paper is to substantiate the outlined and differentiated evaluation of Foucault's *oeuvre* while, at the same time, highlighting the predominant features of contemporary culture. Special attention will be paid to the role of sociology in governmentality.

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Governmentality without Truth

One of the key topics that can be observed in the texts, interviews, and other utterances of Michel Foucault in various periods of his activities is the topic of the inseparable connection, or better, interpenetration between power and the mechanisms that create knowledge. In order to express this idea, Foucault applied his famous neologism: power-knowledge (*pouvoir-savoir*). It is worth remembering that neither the first nor

the latter element of this hyphenated term refers to the traditional ways of understanding the individual elements that comprise it. Therefore, it is not about relations between power understood in its usual, politological, meaning, or the cognitive meaning of the term knowledge. By outlining the horizon of the poststructuralist perspective, Foucault treats both power and knowledge as dispersed, omnipresent, multifaceted, and non-linear phenomena, and the connection between them as a partial identification. Any form of power is also an imposition of certain categories designed to interpret reality, similarly, there is no knowledge that would not pose an interpretative conquest. It would be hard to overestimate the scale of the influence this idea has had on contemporary social and humanistic sciences. This is not so much of a mutual entanglement of power and knowledge as of a deep and formative (although oftentimes unnoticeable) impact of the power-knowledge amalgam on social reality.

Needless to say, when considering the notion of power in Foucault's work, it will always (in this paper also) lead to a discussion on the topic of knowledge and *vice versa*. What I suggest this time, however, is looking into both notions presented in the work by Foucault (power and knowledge) separately, at least to a certain extent; I believe that the evolution of these two threads in his works allows us to evaluate their suitability differently as far as their relevance to contemporary culture is concerned. In short, Foucault's approach to the topic of power and its evolution towards so-called governmentality is evidence of how accurately, not to say prophetically, he sensed the direction of changes in the *Zeitgeist* of Western civilizations, which cannot be said about the evolution of Foucault's approach to the topic of knowledge leaning towards the question of truth and truth-telling.

Although I initially focus on Foucault's conceptions with the intention of justifying the aforementioned assessment of his *oeuvre*, the main purpose of this paper is to preliminarily sketch an outline of the properties dominating contemporary *Zeitgeist*, while at the same time examining the extent to which Foucault's concepts can be a tool to analyze it, and to what degree they require revision and exceedance of their limitations.

Governmentality and the Role of Science in Contemporary Society

Any further analysis of the subject of power in Foucault's works requires it to be done under the following proviso. In this paper, it is my intention to refer neither to Foucault's intellectual inspirations nor to the place his concept occupies on the map of various—both classic and modern—approaches to comprehending power. I have purposely chosen a narrow perspective for my reconstruction of Foucault's thoughts in order to present—hopefully—a deeper insight into his way of thinking, since Foucault's work is so unique that its character sometimes becomes distorted due to precipitous reflection on its origins, or as a result of formulaic reviews, comparisons, and polemics. Moreover, I intend that the approach presented herein may help deepen analyses of Foucault's *oeuvre*, placing it in broader academic frameworks of reference. This latter argument gains importance when, as indicated hereunder, we take into account the fact that—from a Foucauldian perspective—the vast majority of contemporary economic, psychological, educational, and social sciences ought to be subject to critical analyses rather than as just a source of knowledge on reality.

In the late 70s, Foucault significantly broadened his analytics of power. Thus far, his works had mainly concerned both sovereign power (based on legally

codified prohibitions and the system of punishment for breaching them) and disciplinary power (based on detailed orders and surveillance as a method of executing them). More recently, a new notion has appeared in the list of basic types of relations in power, that is, governmentality. Foucault's lectures delivered in the years 1977/78 and 1978/79 are of key importance here. Although they were published in French in 2004, which is 20 years after his death (the English versions were published in 2007 and 2008), the ideas included there became the inspiration for the quite numerous "studies in governmentality," at the onset of the 21st century (see the review of the development of this research area in Bröckling, Krasmann, and Lemke 2011).

The two main interpretations of the notion of governmentality should be recalled here. Some commentators are of the opinion that we are presently experiencing the decline of sovereign and disciplinary power accompanied by the rising influence of new, indirect, and flexible mechanisms to manage society. These rely on equipping individuals and collective entities (groups, communities, firms, organizations, or countries) with a sense of agency and autonomy (e.g., Rose 1996; Bröckling 2007). In this approach, governmentality is based on an indirect way of guiding people and their behavior (allegedly on their own). In Foucault's words (2008:186), it is "the way in which one conducts the conduct of men" which is the matter of concern. Governmentality here is identified with the neo-liberal technology of "governing through freedom" (a notion coined by Nikolas Rose) that fosters innovation, activity, responsibility for one's own actions, and so-called "personal development" in the areas of entrepreneurship, the civic sphere, as well as our personal life. It is worth emphasizing that from the linear vision (wrong, in my opin-

ion) of the, supposed, transition from a "sovereign society" to a "disciplinary society" and then from a "disciplinary society" to "governing through freedom," the author of the latter notion, Nikolas Rose, also distances himself. However, Gilles Deleuze (1995)—the author of numerous, otherwise valuable, commentaries devoted to Foucault's *oeuvre*—yields to this picture. Although Deleuze does not apply the term "governing through freedom"—it is precisely this form of power that his concept of "the society of control" refers to.

Other commentators (e.g., Dean 2010) see governmentality as a complex set of techniques of power that displaces the dominance of sovereign power through the application of various combinations of elements of sovereign and disciplinary power, as well as "the art of government." The art of government is connected to securitization—understood as stressing the importance of the safety of the population, as well as fostering ways of ensuring it by preventing the occurrence of "case, risk, danger, and crisis" (Foucault 2007:90). For this reason, three types of power relations in contemporary society coexist and interact with each other:

So, there is not a series of successive elements, the appearance of the new causing the earlier ones to disappear. There is not the legal age, the disciplinary age, and then the age of security...In reality, you have a series of complex edifices, in which, of course, the techniques themselves change and are perfected, or anyway become more complicated, but in which what changes above all is the dominant characteristic, or more exactly, the system of correlation between juridico-legal mechanisms, disciplinary mechanisms, and mechanisms of security. In other words, there is a history of the actual techniques themselves. [Foucault 2007:22]

From the sociological viewpoint, it is worth looking into the social distribution of the techniques of power. Obviously, not all situations in modern society can be controlled by means of the techniques of “governing through freedom,” such as, for example, mentoring or coaching. We are familiar with situations that are controlled by the penal code and we also are aware of the strict surveillance of conduct in public places. Another question arises (relevant not only from the sociological, but also political point of view) concerning the distribution of power within a given framework of a social structure. Not all participants of social life can or wish to be included in the techniques of “governing through freedom.” In other words, not everyone is able to or willing to become “entrepreneurs of themselves” (Foucault 2008:226). This does not only mean free-market entrepreneurship in the strictly economic sense of the word, but a more broadly understood entrepreneurship, initiative, flexibility, and responsibility in the area of managing one’s own professional career, in the field of civic activities, in areas of our private life, personal relationships, or caring for one’s physical condition.

When analyzing power relationships in contemporary society, one needs to avoid any mental shortcuts or sociological hypostases such as “risk society,” “knowledge-based society,” or “post-modernity.” Instead, it is worth looking into “the emergence of new control strategies and the reconfiguration of old ones,” with the former connected to social inclusion and the latter to exclusion (Rose 2004:240). Institutional and media promotion of new techniques (techniques of “governing through freedom”) is not suitable for everyone, and it may even contribute to deepening the already existing social discrepancies. As Rose notices (2004:259),

it appears as though outside the communities of inclusion exists an array of micro-sectors, micro-cultures of non-citizens, failed citizens, anti-citizens, consisting of those who are unable or unwilling to enterprise their lives or manage their own risk, being incapable of exercising responsible self-government, attached either to no moral community or to a community of anti-morality.

In the summary to the lecture of April 5th, 1978, Foucault states that a new type of knowledge has emerged from the new and liberal art of governing that was introduced in Western Europe at the end of the 18th century. It both claims to have the status of a science and, additionally, is considered to be “indispensable for good government.” What is an important feature of this knowledge, however, is the fact that “this is not a knowledge of government itself, its knowledge, so to speak, is knowledge internal to government.” In other words, this type of knowledge does not concern the “art of government” itself, but is, “as it were, tête-à-tête with the art of government.” On the one hand, this knowledge may be practiced as a science, that is, as a scientific theory, based on cognitive motivation, separate from practical applications as part of the art of governing. Nevertheless, it does appear that even in such a situation “government cannot do without the consequences, the results, of this science” (Foucault 2007:449-450). Foucault draws attention to economics as a field of science that is of crucial importance in the era of governmentality, particularly in the series of lectures entitled *Birth of Biopolitics* (2008). Obviously, economics is such a science that may be practiced for cognitive purposes, however, it is also science that is strongly connected with the modern art of governing, enabling better responses to the demands for the credible diagnosis of socio-economic threats; offering recommendations concern-

ing the directions which would ensure the safety of the population—including helping plan and introduce appropriate economic policies.

It is worth considering the ways in which, 40 years after the quoted lecture, this, as Foucault (2007:450) says, “rather peculiar relationship between knowledge and power, of government and science” manifests itself. Certainly, it still concerns the political economy, as well as other branches of economic sciences. However, it also seems to have moved into other fields of scientific research, taking on various formulae of social relations. On the basis of the concept of governmentality, at least four directions and methods of manifesting relationships between the art of governing and knowledge can be distinguished.

A. What is highlighted in the field of governmentality studies is the conviction of the “economization of the social” (e.g., Bröckling, Krasmann, and Lemke 2000). According to this view, variety in social life falls prey to uniformity dictated by the economics of productivity and the assessment of measurable benefits, while, at the same time, espousing the slogans of autonomy and the sense of agency of the individual (see, e.g., Miller and Rose 2008).

An important premise of the “economization of the social” is the blurring of the lines between the area of work and that of leisure time activities (Lemke 1997:255-256). On the one hand, the aim of leisure time is no longer solely relaxation and rest, but more and more often the acquisition of communicative and interactive skills (e.g., learning a foreign language or team-working skills), as well as mental skills (e.g., flexibility in reacting to new situations or resilience in stressful ones) that are needed at work. On the other hand, the “personal” aspect is intro-

duced into the area of work (for example, through introducing flexitime, establishing small groups of employees, or increasing the pressure to be innovative, creative, and on developing personal communication skills or mental resilience among employees). This trend has led to employee efficiency being increasingly assessed by evaluating them as people and whether they use their leisure time as an opportunity to increase their human capital.

Another aspect of the “economization of the social” is the process of the marketization of areas that were once treated as fields of independent symbolic activity. The mechanisms of promotion and marketing have not only entered the world of art with a vengeance but has also led to academic science being increasingly required to increase its output, efficiency, and practical application. Both a piece of art and scientific work are being subjected to criteria that are, supposedly, objective because of being quantitative. The value of a piece of art is measured by its price and popularity, whereas the value of scientific work is evaluated based on the extent of a researcher’s participation in large research projects and the citation rates of their publications. In both areas, management regulations are introduced that are similar to those that are applied in the economic field, and, in the place of genuine artistic or scientific invention, so-called creativity which relies on social opportunism and the willingness to follow the neoliberal rules of the game is rewarded.

B. Also, the thesis of Nikolas Rose (e.g., 1996) should be noted, according to which, roughly since the middle of the 20th century, the advancing processes of therapeutization and psychologization of social life have been taking place in Western civilizations, particularly through the growing importance of “psy” sciences (psychology, social psychology, psychother-

apy) which offer their expertise on psychic phenomena. In my opinion, however, psychological sciences play neither a key role in organizing social life nor in organizing public discourses. Instead, they fulfill an indispensable service or “tool” function in economic sciences (e.g., in the form of business psychology, which studies, for example, the optimal ways of motivating employees), political sciences (e.g., in the form of political psychology, which studies, for example, political attitudes and the preferences of the potential electorate), and the science of education (where the issue of psychology is obvious). Psychotherapy has a particular status that of the institutionalized and scientifically legitimate practice that serves to reduce any mental discomfort of individuals and, through this, lessen the obstacles that impede the safe functioning of the population.

C. It is also worth noting both the scientific current of critical reflection and studies within social pedagogy that points to the “educationalization” process (e.g., Simons and Masschelein 2008) inspired by the concept of governmentality. It appears that due to the concept of educationalization, the issues analyzed as economization and psychologization receive a particularly accurate reformulation and significant complement.

Educationalization means transferring images and pedagogical categories into spheres of life that are basically unrelated to educational activities, such as economy, politics, civic society, culture, or private life. In this way, issues that were part of non-pedagogical areas of social life undergo a process of reformulation and become pedagogical issues (see: Höhne 2003; Czyżewski 2013a).

This particularly concerns the neoliberal educationalization that distances itself from formalized and insti-

tutionalized patterns of school education based on an asymmetric teacher-student relation and fosters active learning supported by advisors, coaches, and mentors that remain in seemingly dialogue and symmetric relations with their clients (e.g., Masschelein et al. 2006). Moreover, neoliberal pedagogization (initially, a subversive, fringe alternative) has emerged from the polemic dispute with institutional pedagogy. With time, its keywords and ideas have become the new dominant discourse, the evidence of which is widespread recognition that it evokes and any lack of serious attempts to discredit it. In this way, the powerful influence of pedagogy and its cognitive and practical perspective on contemporary methods of implementing and sustaining power relationships is clear.

D. Perhaps this fusion of economics and pedagogy will one day become a scientific discipline, despite being a vision that is rather unrealistic nowadays. Before this topic is put to bed, however, it is time to look into our own backyard and question the place of sociology in the relationship between the modern art of governing and science. One may wonder why this is not such a frequently discussed issue among sociologists themselves. Especially that contemporary sociology seems to be playing the “tête-à-tête with the art of government” mentioned by Foucault particularly eagerly, and is far from being cognitively innocent. Instead of the previous unity or mixture between power and knowledge (or science and the art of governing) the separation and also mutual dependency of both areas comes in. If (and this is a fact) the sociological analyses of “social capital,” “innovation,” “agency,” or “trust” are devoid of self-critical reflection—with the entanglement of these analyses in the symbolic service of neoliberal capitalism—then it is impossible to resist the thesis regarding the cognitive and political opportunism of the vast majority of contemporary sociology.

Governmentality and Contemporary Sociology

The problematic relationship between governmentality and sociology deserves a closer inspection. Firstly, it concerns the process of the selective mainstreaming of the internal criticism of sociology. In the 1960s and 70s, a wave of criticism of the main streams of sociological theory and the standard methods of social research at that time swept through firstly American and then European sociology. In fact, it was not so much a criticism of sociology itself as it was a self-criticism by sociologists themselves. The authors of these accusations and concerns (e.g., Harold Garfinkel, Aaron Cicourel, Erving Goffman, Herbert Blumer, Anselm Strauss, Alvin Gouldner, and Pierre Bourdieu, as well as their followers) questioned those areas of sociology that formerly had been commonly thought of as its paramount accomplishments, though each from a different angle and frequently indirectly. It is worth adding, however, that these authors were more engrossed in formulating new and alternative directions of sociological inquiries, the productivity of which was only possible thanks to the fact that by not agreeing with the dominant approaches to practicing sociology, new alternative ways were, thus, elaborated.

Since then much has changed in sociology. A number of new ideas (which were previously treated distrustfully or even ironically) have made their way into the main streams of sociology. These include something as obvious today as the role of patterns of interpretation in shaping social reality or the presence of the new methods of qualitative research that many research projects are equipped with nowadays. Nevertheless, the far-reaching acceptance of these ideas came at great cost, that is, the neutralization of the

critical, sometimes even subversive, potential that lies within them. Moreover, contemporary social sciences (as well as humanities) tend to be absorbed in the compulsive production of texts and research reports and in the promotion of more and more new “turns” (e.g., the cultural turn, visual turn, performative turn, etc.) rather than in genuine intellectual ferment and invigorating contestation. Innovation has been reduced to fit in with the requirements of marketing and the promotion of one’s own publications, as well as the, supposedly, original orientations and approaches that are presented there.

The above-mentioned wave of criticism was both diverse and partly also conflicted. One of the commentators (Zaner 1973), while making a necessary simplification of the big picture, emphasized two currents; referring to them as radical (phenomenological) and political criticism. The former focuses on the rules of interpretation and the structures of experience based on the phenomenological inspiration that is rooted in Kant’s concept of the conditions of possibility and defining the frames of specific acts of experience. Different branches of interpretive sociology such as ethnomethodology, phenomenological sociology, or, to some extent, symbolic interactionism may serve as examples. Political criticism refers to Marxism and neo-Marxism, by Antonio Gramsci in particular, and draws attention to the inevitable ideological bias of social sciences, as well as to the need for the political engagement of sociology. Alvin Gouldner was a famous advocate of that perspective in the 1970s. Both types of criticism competed with each other for the title of true criticism, acknowledging the adverse solution as a seeming one. I recall the conflict at that time and, in my opinion, nowadays, we are in need of a criticism that would combine the interpretive and political aspects while at the same time proposing a new viewpoint based on a thorough redefini-

tion of the “interpretive” (which is associated with knowledge) and the “political” (which is associated with power). It is my presumption that the concept of governmentality may offer such a holistically critical approach.

Besides, the perspective of governmentality and, more broadly, using Foucault’s basic categories, makes it possible to look at the process of the selective mainstreaming and domestication of interpretive sociology within contemporary sociology with hindsight. Hence, it may be said that in their simplest social context, interpretive notions (such as the ethnomethodological concept of reflexivity, the phenomenological concept of reciprocity of perspectives, and the social construction of reality, or symbolic-interactionist concepts of self, symbolic interaction, and negotiated order) expressed resistance towards the mechanisms of sovereign and disciplinary power. Moreover, interpretive perspectives in sociology show that social order is always constructed gradually—in and through situated interpretive processes—even when one may have the impression that human actions are subject to structural determination that are external to them. In this way, interpretive sociology brought with itself the ideological message that every social order, even the most oppressive one, may be questioned from within. However, when interpretive notions were transferred to the sociological mainstream, they became part of the discourse on governing through freedom, which is a “soft” and indirect type of power relation, although it is equally as invasive as that of sovereign or disciplinary. It can thus be stated that in recent decades the social function of notions and ideas rooted in interpretive sociology has changed quite imperceptibly.¹

¹ The category “change of function” was introduced by Karl Mannheim (1952:188-189). For more comments on the change of function of interpretive perspective see: Czyżewski 2013b.

A similar process took place in management science. In the 1960s and 70s, critical theory expressed its disagreement with the bureaucratic, anonymous, and schematic style of management in the area of business and advocated an increase in the area of employees’ autonomy, as well as allowing them flexibility when realizing their tasks. As proven by Luc Boltanski and Ève Chiapello (2005), in the 1990s, management science adopted these ideas and reformulated them as the golden rules of “the new spirit of capitalism,” fostering employees’ innovation within flexible teams and projects. In a true Foucauldian manner, it should be added that “the new spirit of capitalism” can be considered a variety of governmentality which, in turn, (as every formula of power) maps out the spheres of exclusion. In this case, exclusion may pertain to those individuals who are unable to, or will not, fulfill the requirements of so-called creativity, empowerment, and self-responsibility.

Secondly, the selective mainstreaming of interpretive sociology is accompanied by the incredible and—for many reasons—a troublesome career of the term “agency” as part of the theoretical language of contemporary sociology. The term and the idea of “agency” became fashionable in sociological discourse in the 1980s together with the proliferation of the “agency-structure” theorem proposed by Anthony Giddens (1984), which was originally intended to bridge the gap between “subjectivist” (too strongly “agency”-oriented) and “objectivist” (too strongly “structure”-oriented) sociological orientations. It might be arguably demonstrated that the “agency-structure” theorem was based on a substantial misinterpretation of both parts of the formula.

More specifically: the idea of the agency was certainly a salient feature of symbolic interactionism, espe-

cially in Herbert Blumer's version of this perspective. Giddens' phrase "subjectivist" in the case of symbolic interactionism is not a mistake. Whereas the situation is different with ethnomethodology, which was labeled by Giddens (in this case erroneously) as a supposedly "subjectivist" approach, despite having clearly distanced itself from the notion of agency by offering a novel approach to the self-organizational character of communication. Similar distortions were associated with Giddens in reference to approaches which he called "objectivist." Certainly, it is easy to find examples of the objectivist perspective on social structures, but the key variety of sociological structuralism, namely, the structural functionalism of Talcott Parsons, was intended to distance itself from sociological "objectivism" by offering a generalized approach to the analytically abstracted dimensions of social life. In other words, it may be asserted that the insights of some of the innovative sociological approaches have been significantly distorted while attempting to domesticate them within (and adjusting them to) the sociological mainstream.

It is not only worth considering whether the notion of agency or the "agency-structure" dilemma may be an intellectual fallacy. It may well be that the social and political costs of this fallacy also need to be addressed, especially as "agency" language proves to quite neatly fit into neoliberal discourse promoting "empowerment," "flexibility," "creativity," "participation," and, last but not least, "agency." Instead of offering new conceptual and methodological tools for the study of "agency," as present in neoliberal forms of economic and social life, both sociological theorizing and research focused on "agency" have instead become a part of the problem which needs to be analyzed.

Widely and uncritically used words are a sign of linguistic habit. And a linguistic habit that is present in

many statements, particularly influential ones, indicates patterns of discourse. As pointed out by many authors, the alleged obviousness of discourse is usually a display of its cultural dominance. It is, therefore, important to ask questions that go "against the current" of fixed habits of communication. Since the discourse of "agency" has been given the status of obviousness in contemporary sociology, this fact should lead to a skeptical reflection of the fusion of the cognitive, social, and political costs of "agency fallacy."

The concept of "agency" (individual or collective) as one of the salient characteristics of contemporary sociological theorizing is, to some extent, a rather troublesome result of a half-way attempt at the fluidification and de-essentialization of the social-scientific picture of contemporary social reality. A possible way out of the intellectual and political predicament caused by the "agency fallacy" may be found in Foucault's concept of "subjectification," which plays a central role in the entire *oeuvre* of Foucault. It is also crucial from the point of view of the present argument, as it makes it possible to overcome the classical sociological "actor vs. situation" frame of reference.

"Subjectification" (quite an unusual word) is the English translation of the French term "assujettissement," the literal meaning of which is "subjection" or "subjugation." A literal translation of the Foucauldian "assujettissement" as "subjection" can be found, although it is not an ideal solution. In Foucault's case, it is more important that the notion of "assujettissement" contains the word "sujet" ("subject"). Hence, the somewhat awkward neologism "subjectification." In Foucault's own formulation it is exactly this notion that concerns the main focus of his research interests, that is, to "a history of the dif-

ferent modes by which, in our culture, human beings have been made subjects" (Foucault 1982:208). In the formulation of Nikolas Rose (2004:58), the main research question is as follows: "What kinds of human beings have we come to take ourselves to be?" Foucault was primarily concerned with the history of different varieties of "subjectification," and it was from this perspective that he looked at the issue of power. In other words, he argued that the ubiquitous processes of "subjectification" always take place within the relations of power. Just as social forms of power change historically, so do the socially-shaped variations of subjectivity.

Combining all the elements of the arguments above, it may be concluded that governmentality, the leading theme of Foucault's lectures in 1978-1979 (Foucault 2007 and 2008), and of governmentality studies is—paradoxically—nothing but a complex method of indirectly governing a population by equipping individuals and groups with a sense of agency. If we understand governmentality as a formula for indirectly governing the population by means of the self-government of workers and citizens, then the following conclusion appears inevitable: The contemporary idea of "agency" is an "idol" in its classical Francis Bacon's sense: a well-established but mistaken illusion. However "agency" is both something else and something more. The idea of "agency" is not only, and not really, an ideology supporting new varieties of economic activities, new developments in management, and—last but not least—new trends in popular culture. In the Foucauldian frame of reference, "agency" is primarily a social "apparatus" of power (in the terminology of Foucault a "dispositif" of power)—that is, a complex set or ensemble made up of discursive elements (such as diverse texts, including sociological formulations), as well as non-discursive ones (such as models of social

organizations and institutions, etc.), which together make up a mechanism of social constitution and application of power relations (cf. Foucault 1980a).

The third aspect of the problematic role of sociology in relation to the contemporary "art of government" is the marginalization of the issue of power, which is accompanied by the misleading interpretation of the changes which Foucault supposedly introduced into his concept of power relations in the late 1970s. In the reception of Foucault's *oeuvre* a two-part scheme of interpretation was perpetuated. In the early and middle period of his career, Foucault was to reject the idea of the autonomy of the subject altogether and treat subjectivity solely as a product of power relations. The concept of disciplinary power and its correlation in the form of a docile subject were supposed to have been the final word on this viewpoint. In the late 1970s, the so-called "late" Foucault was to step away from the previously predicated vision and open up more and more to the issue of freedom and agency. What is more, it is sometimes conjectured that the "late" Foucault, just like the prodigal son, came to terms with liberal thought. In his new approach, the areas of the self-realization of a subject were not supposed to be unlimited or easily accessed, however, the subject could and should find and cherish them. This pattern of interpretation appears in many books on contemporary sociological theories and in numerous other publications.

The readiness with which this pattern is accepted may raise concerns, particularly when it is compared with a thorough reading of Foucault's texts and lectures. It does appear that basic elements of this pattern have their roots in interpretative simplifications and mistakes. For instance, a more in-depth reading of *Discipline and Punish* (Foucault's best-known book, which is the crowning achieve-

ment of the “middle” phase of his activity), does not confirm what many commentators imagine about the totalizing character of disciplinary power. Since such an idea is mistakenly attributed to the “early” and “middle” Foucault, then perhaps Foucault’s actual “late” shift of interest towards ethical issues may also be mistakenly interpreted as walking away from this totalizing vision after becoming convinced of its limited, and therefore less oppressive, influence. In actual fact, by analyzing the whole of Foucault’s work, we are justified in accepting the opposite thesis, developed, for example, by Jeffrey Nealon (2008). According to this thesis, not only do the texts, lectures, interviews, and other statements from subsequent periods of Foucault’s career not fit in with the already mentioned fundamental re-evaluation of the concept of power or with the development of Foucault’s perspective, but they also serve as evidence of the immutability of its main assumptions. Moreover, they also justify the supposition that a, paradoxical, process of intensification of power relations has been taking place throughout the course of history, during which power has become less visible, but by no means less invasive. The advancing intensification of power means its “abstraction, lightening, extension, mobility, and increased efficiency” (Nealon 2008:32).

It seems that the concept of governmentality outlined above is well-suited to the thesis of the historical process of softening and intensification of the techniques of power. Together with the ever-broader introduction of “governing through freedom,” the motivation of individuals to social conformism also changes. The motif of fear of punishment created through sovereign power and the pursuit of self-discipline through discipline power is accompanied by the illusionary sense of agency, self-realization, and subjective autonomy.

A two-part interpretation is still commonly treated as plausible. An effective obstacle to questioning it are the hackneyed patterns of common sense and sociological reasoning. Commonsensical beliefs and sociological theorizing (including the so-called critical theory which, in that matter, has lost its critical edge) share a predominant presumption that a fundamental contrast exists between power, oppression, and subjection on the one hand, and agency, emancipation, and autonomy on the other. A similar contrast is noticeable in the opposition of “agency” and “structure” in Giddens’s “agency-structure” dilemma. Critical theory and its numerous offshoots postulate the emancipation of agency from the pressure of various restrictions. Giddens suggested overcoming the agency-structure dilemma by using a theoretical “third way” in the form of structuration theory (Giddens 1984) and the concept developed later, namely, “late modernity,” based, *inter alia*, on the idea of individual and collective identity projects (Giddens 1991).

Each of these solutions has become (in one way or another) a variant of the contrast between agency and power, or agency and structure. This could not be more wrong, agree Rose and Foucault. To quote from Nikolas Rose again (2004:54-55):

all the essential, natural and defining conditions that tend to be ascribed to the human world—modern forms of subjectivity, contemporary conceptions of agency and will, the present-day ethics of freedom itself—are not antithetical to power and technique, but actually the resultants of specific configurations of power, certain technological inventions, certain more or less rationalized techniques of relating to ourselves. One cannot counterpose subjectivity to power, because subjectification occurs in the element of power; one cannot counterpose freedom to tech-

nology, because what we have come to understand as our freedom is the mobile outcome of a multitude of human technologies.

Perhaps surprisingly, certain journalists seem to have a greater understanding of this question than the majority of sociologists, psychologists, and pedagogues. A short and controversial text written by Martin Lukacs (2017) is a fitting example of that. Lukacs points to the deeper meaning of fostering ecological awareness; understood as the moral obligation of individuals to undertake various initiatives in the area of “greening” one’s personal life. The nobly motivated efforts of an individual have little value when contrasted with the effects of those branches of the economy that systematically and on a giant scale contribute to climate change. Placing the responsibility for climate change on individuals fits in perfectly with the individualistic social philosophy of neo-liberalism. One would wish to add that (after Foucault): ecological awareness examined not from the perspective of even the noblest motivation of individuals, but from the perspective of its social function turns out to be (paradoxically and contrary to the intentions) yet another cog in the smoothly working mechanism of governmentality. The sense of emancipation and initiative (e.g., as a result of introducing changes in lifestyle that were the consequence of one’s own decisions concerning diet or transport choice) is not contrary to power relations but its necessary component.

Despite this, contemporary sociology insists (to a great extent and independently of sometimes deep theoretical and methodological differences) on the traditional conviction that the basic frame of reference of social sciences should be contrasting the individual and society; independent of social pressures and our succumbing to them; freedom

and oppression; or subjectivity and power. The consequence of insisting on such a position is the unconditional glorification of such values like empowerment, resilience, agency, autonomy, and participation. *Ipso facto*, the extensive field of neoliberal techniques of power based precisely on these values is treated with admirable naivety as a result of the liberation from power relations. And as the share of “governing through freedom” in the total repertoire of contemporary techniques of power increases, the ability of sociology to trace power relations in social life then decreases to the same degree—even, or perhaps especially, with reference to the situations seen by the majority of society or the actors themselves as that of free, autonomous activity. By marginalizing the role of power in contemporary society, sociology loses its critical overview of reality. Instead, it adopts and develops the language used in reform-oriented movements in politics, economy, technology, management, mass media, and popular culture. In this way, sociology becomes part of the problem it should be analyzing. Therefore, the question arises of whether it is not true that sociology should become a subject of any critical overview in discourse and dispositive analysis, standing on par with other areas of social reality (cf. Czyżewski 2019).

The Question of Truth: Foucault’s Perspective and Transformations of Contemporary Culture

The lectures on governmentality from the years 1977/78 and 1978/79 (Foucault 2007 and 2008) referred greatly to modern times, partly to the latest events (since they were about the period post World War II in Germany and the United States). As I have pointed out previously, the conceptual categories suggested during these lectures were useful in nu-

merous analyses of social reality at the turn of the 21st century, evidence of which can be found within governmentality studies. The course of 1979/80 (Foucault 2014), on the other hand, brought about such an important displacement of the center of gravity that it must have been a surprise for the audience gathered at the Collège de France. As if the fact that the subsequent series of lectures (including those from 1980/81, 1981/82, 1982/83, and the final one from 1983/84; see: Foucault 2017; 2005; 2010; 2011) concerned mainly ethical and subjectivity issues (totally excluding the socio-economic issues) was not enough, this topic displacement was accompanied by a sea of change in its historical context. Beginning with the course in 1979/80 (*On the Government of the Living* [Foucault 2014]), the topic of the lectures was restricted entirely to the culture of late antiquity and any possible references to contemporary times were left to the recipients' interpretation.

An attempt at explaining these re-evaluations was offered in two lectures given in Dartmouth in November 1980—that is, after the course in 1979/80, but still before the course in 1980/81 (Foucault 1993). Foucault admitted there that, with time, he had become increasingly aware of the fact that as well as “techniques of domination of individuals over one another” the “techniques of the self” ought to be included, that is, the techniques of the individual's effect on themselves. It is worth emphasizing again that, in this context, Foucault does not mean the subject's activities being free from any social influences, but rather how an individual's effect on themselves is included in the mechanisms of social control and coercion. Thus, it is still about “government,” which Foucault now describes as “the contact point, where the way individuals are driven by others is tied to the way they conduct themselves” (Foucault 1993:203).

Along with this shift towards the “techniques of the self” in Foucault's late lectures, changes appeared in the analytical instrumentarium concerning knowledge. The notion of power/knowledge which was, thus far, the key one, disappears,² and in its place, a new approach to the topic of truth arises. The topic of the truth, or rather the social construction of what is regarded as the truth, had occupied Foucault since the beginning of his scientific activity. However, until the turn of the 70s and 80s, the truth had been expressed to its fullest in the phrase “regime of truth.” And it was through this phrase, in an interview in 1976, that Foucault showed that (contrary to popular belief) truth was not a result of being freed from power relations, but—on the contrary—it was the result of power relations in a given society. In other words, “truth” is not the truth of reality but “is to be understood as a system of ordered procedures for the production, regulation, distribution, circulation, and functioning of statements” (Foucault 1980b:133). Therefore, “truth” is indeed the “regime of truth.” Importantly for the disquisition presented herein, Foucault (1977:13) invariably claimed that “each society has its regime of truth, its ‘general politics’ of truth.”

As part of his lectures in 1979/80 (Foucault 2014), the subject of analysis was the key practices of early Christianity: acts of belief and acts of confession, understood as acts of a subject within the oppressive regime of truth. It could be said that here Foucault brings about an extreme radicalization of the earlier phrase, “regime of truth.” Later on, in his lecture courses in 1980-1984, the subject's “own” truth

² Strictly speaking, in the first lecture of the series entitled “The Government of the Living,” Foucault eschews using the notion of knowledge/power and names it “the now worn and hackneyed theme” (Foucault 2014:11). As Michel Sennelart explains, the term coined by Foucault that is still used today, that is, power/knowledge, was used by Foucault from 1972 until the mid-1970s. Then it began to be replaced by knowledge/power (Sennelart 2014:338-339 and 352).

becomes the topic of analysis, though from the perspective of late antiquity, particularly through stoic thought, along with the ancient idea of truth-telling (“parrhesia”). Truth acts may, then—to a lesser or greater extent—be the results of “techniques of domination” or “techniques of the self.” Yet, regardless of the fact that “truth” is more the result of techniques of dominance or techniques of the self, it is not about the relationship of an utterance or a text to reality, but about how, in acts of truth, our relationship to ourselves is expressed.

Foucault’s late reflection on acts of truth attracts criticism from at least two perspectives. Firstly, by concentrating on acts of truth, it may lead to marginalizing the question concerning whether a statement is true (in line with reality) or not. Certainly, this happens to acts of belief and acts of confession. The situation is more complex when it concerns being truthful, however, since the main feature of such statements is, according to Foucault, not limited to the courageous preaching of uncomfortable views, even if it means exposing oneself to serious inconvenience or danger. Being truthful assumes an accurate understanding of reality. However, the dominating feature of parrhesia is remaining true to oneself against all the odds. It is worth stressing that (contrary to Foucault and his successors) a value dismissed much too often is the plain truth as a statement in line with reality. Bernard Williams quite rightly points to the significant role of communicating these “plain truths”—little truths about common, everyday matters and situations. However, he notes that scientific work should not be limited to formulating plain truths because its mission also concerns elaborating broader interpretations that were susceptible to being called into question (Williams 2002:1-19). Following in the footsteps of Bernard Williams, Tony Judt reveals the tension

between truthfulness, that is, respecting “smaller truths” concerning facts and following the requirements of “higher truths,” for example, loyalty towards a suitably understood *raison d’être* (Judt and Snyder 2012:287 and 309-310). The immense social need for an interpretation of the current or historical political processes concerns not only scientists, but also intellectuals and the symbolic elites in general (e.g., journalists, politicians, and the clergy). What seems particularly dangerous in this respect is the bending or even warping of facts in the name of proclaimed ideas and outlooks.

Secondly, the appeal to respect plain truths and cherish the two virtues of truth, “Sincerity” and “Accuracy” (Williams 2002:84-148), has become of particular importance in today’s culture, where manipulation, bare-faced lies, and indifference towards the truth of a statement is commonplace. However, the normative validity of the postulate does not prejudice its implementation. In fact, the more rarely the postulate of telling the truth is implemented, the more important (or normatively more legitimate, so to speak) it seems. Hence, if aiming at being truthful is not an axial feature of contemporary culture, then the notion of telling the truth may be only partially useful when analyzing reality. Reconstruction of the patterns in the attitude to the truth that dominates in contemporary culture requires different approaches.

Two ideas provide inspiration here, the first of which has long been unappreciated. The humble essay *On Bullshit* by Harry Frankfurt only became well-known in the 21st century, despite being published in 1986 (Frankfurt 2005), as this is when cultural reality caught up with the diagnosis suggested by Frankfurt. Interestingly, it was a philosopher, not a sociologist who offered such a great dose of sociological imagination. Frankfurt makes a distinction

between a liar and a bullshitter, explaining that they both deceive us, but in two different ways. A liar hides the fact that he is lying, that he consciously and deliberately does not tell the truth, whereas a bullshitter hides the fact that “the truth-values of his statements are of no central interest to him; what we are not to understand is that his intention is neither to report the truth nor to conceal it” (Frankfurt 2005:55). For a liar, therefore, truth is—paradoxically—still an important point of reference because a liar wants to secretly deny it and, in this way, mislead us, while the truth is irrelevant for a bullshitter. Although it may happen that a bullshitter is telling the truth, it does not matter to them whether they are lying or not. Although Frankfurt noticed the rise of the phenomenon of bullshitting as early as the 1980s nowadays we may talk about its real invasion. Today, we are all aware that the omnipresence of bullshitting in contemporary culture is supported by, for instance, technological and business mechanisms of media communication—the Internet in particular.

The other idea is more commonly known. Between 2016–2017, in the context of such media events as Donald Trump’s tweets or the arguments disseminated by the supporters of Brexit, the notion of “post-truth” went viral. Oxford Dictionaries defines “post-truth” as “an adjective relating to circumstances in which objective facts are less influential in shaping public opinion than appeals to emotion and personal belief” and declared the term Oxford Dictionaries’ international word of the year 2016.³ The rise of the phrase “post-truth” (or “posttruth”) happened overnight, it appeared and expanded at an incredible pace, only to virtually disappear from

public space. The speed at which the once fashionable term “post-truth” (and its equivalents in many languages worldwide) vanished, was not unrelated to its previous inflated use that frequently, quite wrongly, identified post-truth with a lie, a con, or preaching an untruth. Additionally, the phrase “post-truth” was used as an invective in political clashes. Consequently, the notion “post-truth” was discredited, considered as a phrase no longer useful to describe the all too well-known phenomena.

It is worth stressing the difference between what, on the one hand, is associated with the phrase “post-truth,” that is, the inflationary and indiscriminating journalistic use of this notion and, on the other hand, the distinct meaning of the phrase “post-truth” and the attempts to apply it when analyzing the transformations in contemporary culture. There have also been numerous academic attempts to apply “post-truth,” of which even a brief overview would stretch beyond the limitations of this text. Jason Harsin (2015), a media expert, put forward an especially interesting suggestion of an analytical approach to the phenomenon of “post-truth” when pointing to the key role of the attention economy in contemporary culture.⁴ Together with the development of digital communication technologies, the dissemination of their passive and active access, as well as the saturation of public space with huge amounts of information, the issues of the authenticity of this information and the truthfulness of the sender have become less relevant. The criterion of the relevance of information is based only on whether or not it draws attention to itself and holds this attention—if only for a short while. As Harsin notices, we are faced with regimes of truth, that is, the social mechanisms of establishing what should

³ See: <https://en.oxforddictionaries.com › word-of-the-year-2016> [Retrieved October 16, 2016].

⁴ Actually, Harsin uses the spelling “posttruth.”

be seen as truth, giving way to post-truth regimes, that is, the social mechanisms of attention management. According to Frankfurt's anticipating intuition, patterns of communication are developing on a massive scale right before our eyes. And within those patterns, it is irrelevant whether a piece of information is true or not. What is important in the process of communication, however, is the element encapsulated in the above-quoted definition from Oxford Dictionaries, namely, "appeals to emotion and personal belief." One should not, however, be deluded: although many users of digital communication suggest or even try to assure us that they are telling the truth, it is not usually about truth or truthfulness. The regimes of truth have lost their function of a general criterion of the validity of information, and instead gain the status of solutions appropriate for specific cultural niches, such as scientific or court proceedings, or religious life. These niches remained relatively isolated islands in the sea regulated by the principle of post-truth.

Towards a Genealogy of the "Post-Truth" Society

There is no end to our inquiries: our end is in the next world. When the mind is sated, it is either a sign of diminished faculties or weariness. No powerful mind stops within itself: it is always stretching itself and expanding its capacities. It makes sorties which go beyond what it can achieve: it is only half-alive if it is not advancing, pressing forward, getting driven into a corner and coming to blows; its inquiries are shapeless and without limits; its nourishment consists in amazement, the hunt and uncertainty. [Montaigne 1993:1211]

These words, written in the 16th century, accurately present the passionate pursuit of truth that was so characteristic of the whole period of modernity. Re-

called today, these words allow us to realize that the pursuit of truth is not a dominant feature of contemporary culture, even if we assume that the pursuit of truth does not mean establishing the facts, but what should be established as truth. It is thus because contemporary culture has become indifferent to the issue of the truthfulness or falsity of statements concerning reality. It has been a long-term process which has gone through several stages: from the recognition that knowledge, inevitably, has a perspective character, through locating these sources of perspectivity of knowledge in the sphere of group interests or individual psychological mechanisms, abandoning truth for the principle of honesty, and finally, to the invasion of post-truth and bullshitting.

Frankfurt (2005:33) recognizes the "lack of connection to a concern with truth" as the essence of bullshit. This "indifference to how things really are" (Frankfurt 2005:34) is also an important feature of post-truth. One may seek the answer to the question of which factors may favor the dynamic expansion of such a tendency in many ways, three of which seem most significant.

Firstly, technological and organizational transitions in the field of mass media have led to a proliferation in the number of dispersed and unrelated messages which are offered to the recipients in the public space. They also favor "prosumption" (which means that more and more ordinary citizens are becoming not only consumers, but also producers of messages). Thus, the inclination of ordinary citizens to make their voices heard on matters they know nothing about is enhanced. What matters is one of the two virtues of truth indicated by Williams (2002): "Sincerity." Following the other one, "Accuracy," is not required. Frankfurt also talks about two ideals that refer to the truth, however, in his case, along

with “sincerity” comes “correctness” (in his essay, the term is related to the notion of “Accuracy”). His judgment of relations of the two ideas brings the matter to a head. In his view, “a retreat from the discipline required by dedication to the ideal of *correctness* to a quite different sort of discipline, which is imposed by pursuit of an alternative ideal of *sincerity*” is taking place. In these circumstances, as Frankfurt ironizes, “sincerity itself is a bullshit” (Frankfurt 2005:65 and 67). However, to put it more precisely, bullshit (or post-truth), that is, talking without concern for the truth, should be distinguished from telling one’s own truth (i.e., favoring sincerity without being concerned about accuracy or correctness). To recapitulate, one may point out at least three kinds of failure to meet the rigors of the pursuit of truth: bullshit (or post-truth), telling one’s own truth, and simple lying. The rise of all these three phenomena seems to be facilitated by the recent developments in mass communication, especially by the digitalization of public space.

Secondly, one may take a step further and assume that transitions in the field of media, and—more broadly—culture as a whole, do not take place in a vacuum, but are related to changes in social organization, in the field of power relations in particular. Harsin (2015), whom I mentioned earlier, talks about regimes of post-truth. An important supplement to Harsin’s reasoning is the concept of another philosopher, Bernard Stiegler (e.g., 2010). In his polemic with Foucault, Stiegler argues that we are presently dealing not so much with biopower, but with psychopower. Psychopower has become the main function of biopower and it is based on the implicit and anonymous managing of our dispersed attention, which—as a consequence—leads to the destruction of attention, that is, stupidity, manifesting itself in the inability to connect information and, as a result,

to irresponsibility and incivility. It is worth noting that both regimes of post-truth and psychopower provide individuals with the illusionary feeling of the agency while in fact indirectly guiding their conduct—thus both regimes of truth and psychopower may be thought of as mutually affined manifestations of governmentality.

Finally, it is important to consider the relationships between the abatement of regimes of truth combined with the formation of regimes of post-truth and transformations in various spheres of symbolic culture. As is already well-known, not only is the cultural sphere witnessing the contestation of the traditional, hierarchical division into “high” and “low” culture, but also the impugment of the terms used to describe this division. Assessment of the artistic message nowadays relies on the freely expressed, subjective feelings of laypeople. These opinions are deemed equipollent to the professional, formal criteria which were previously considered sacrosanct. The opinions of individual recipients are tallied up, and the most popular choice becomes the objectified criterion for the evaluation of the artistic message. This measure is not permanent and undergoes fluctuations in line with changes in the audiences’ preferences. Among the plethora of information available in the media, the audience may also find data on the growth or decrease in the number of the so-called “likes.”⁵ Substantial parts of Western civilization are undergoing significant transformations in the realm of religiousness. A clearly noticeable crisis is being reported among Christian denominations, especially Catholicism. Paul Veyne (2010) persuasively shows that it was such features as its holistic, pervasive worldview, access to a universal community,

⁵ More on the concatenation of the democratization of culture and governmentality, cf. Czyżewski 2018.

institutional centralization, and, last but not least, the “imperialism of its ‘truth’” that allowed Christianity to gain enormous influence in Europe in the early 4th century AD, ousting “pagan” forms of belief. The current gradual ebb away from Christianity, and from Catholicism in particular, certainly stems from numerous causes, among which we must not ignore those related to the growing resentment towards a situation where the patterns of religiousness, or—broadly speaking—spirituality, are regulated by means of regimes of truth.

Conclusion

Finally, I would like to return to my initial remarks and offer a general hypothesis concerning the interdependence of transitions in the field of knowledge and in the field of power relations: contemporary changes in the field of knowledge (in particular, post-truth, bullshit, and the destruction of attention) interact with numerous manifestations of governmentality, especially with the mechanisms of psychopower and regimes of post-truth. Regimes of truth, in turn, were not to be attributed to all social organizations, but they would rather be connected solely with sovereign and disciplinary power.

It should be added that such a hypothesis would stand in direct contradiction with key assumptions drawn by Foucault, which claimed the nonlinear character of social processes and the discontinuity of social reality (and, therefore, a lack of regular interaction between various fields of social life). Moreover, this hypothesis should be granted a limited range of validity by acknowledging the existence of communities and sectors of social life that are excluded from the field of “government through freedom.” Most importantly, this hypothesis would also contradict the regularity proclaimed by Foucault (2014:7) with-

out any exception that “there is no exercise of power without something like an alethurgy,” where what Foucault understands by alethurgy is “the manifestation of truth as the set of possible verbal or non-verbal procedures by which one brings to light what is laid down as true.” However, as I was trying to present, there is governmentality without truth.

What one may find perplexing is the consistency, if not obstinacy, which made Foucault cling to his—as I have striven to prove—wrong belief about the omnipresent relationship between knowledge and power. The explanation for this peculiar extrapolation can be found in post-Foucauldian studies. Namely, some of the latest publications (e.g., Lazreg 2017) criticize the Eurocentrism of his philosophy in reference to cultural otherness. The earliest re-evaluation of Foucault’s *oeuvre*, which points to the lack of reflection on the possible impact of his own cultural identity (a white European man with an upper-class background) on the way he thinks about the world, can be seen in the “unorthodox” variant of a postcolonial theory proposed by Gayatri Spivak (1988). Perhaps, Foucault was so preoccupied with his own confrontation with the enlightenment mainstream of European culture that he never noticed the doxa shared by both sides. Admittedly, he did uncompromisingly contest the existing regimes of truth, and stressed that “nothing is more dangerous than a political system that claims to lay down the truth”. On the other hand, however, he was convinced that “nothing is more inconsistent than a political regime that is indifferent to truth” (Foucault 1988:267). In his works on governmentality, he acutely emphasized the connection between this type of power relation and concern for security, showing a particularly keen interest in the avoidance of “case, risk, danger, and crisis” (Foucault 2007). Presumably, the blind spot of this apt diagnosis was the fact that he had missed the tendency for governmentality without truth.

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Paradoxes of Doctoral Studies in Education Sciences in the Czech Republic

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Abstract: Adequate staffing of university studies with qualified academics was completed thanks to the reimplementation of three-stage university education during the post-socialist restoration of higher education in the Czech Republic. Thus, the doctoral degree of education has been attained by more than four-fifths of academic staff, with over two-fifths of them being aged 50+. The current course of university studies, including doctoral study programs, is influenced by their focus on educational and research strategy. With regards to the regulations for graduating in doctoral studies, doctoral candidates act as homo oeconomicus following neo-liberal educational policy. The conditions for doctoral studies, namely, those in educational sciences, thus lead to paradoxes caused by the current higher educational policy. The objective of the paper is to analyze the neoliberal set-up of the higher education policy of the Czech Republic in the field of doctoral studies in educational sciences in particular and its possible impacts in the area of labor-market integration of graduates and university training of academics.

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Foucault's theory of governmentality, which is related to the understanding of government regulations and their application as shown by research (Raaper 2016; 2018), can currently be applied to Czech universities, to the academic profession, and possible aspirations of future academics during their doctoral studies (Burford 2018; Evans 2020). The general goal of higher education is to provide students with adequate professional qualifications, prepare them for engagement in research and participating in lifelong learning, helping them contribute to the development of civic society and international, particularly European, cooperation (Burns and Köster 2016). Changes in higher education institutions, structures, and the goals of universities affect the meaning of the quality of the particular discourse, not excluding teaching. Foucault's concept of education stems from its political way of maintaining or modifying the appropriation of discourses, along with the knowledge and power which they carry. "What, after all, is an education system, other than a ritualization of speech, a qualification and a fixing

of the roles for speaking subjects, the constitution of a doctrinal group, however diffuse, a distribution and an appropriation of discourse with its powers and knowledges?" (Foucault 1981:64). Foucault criticizes the concept of university education based on liberalism and neo-liberalism and its American version that highlights the theory of human capital through which economic theory infiltrates university education (Foucault 2008:219).

During the time of socialism, employment at higher education institutions usually required more of a political affiliation than expertise from academics in the Czech Republic (Connelly 2000; Kascak 2017). This is the reason why the higher education policy in educational sciences has been focused on support for the completion and widening of qualifications of academics due to the expansion of doctoral study programs since the 1990s, with the deficit being reduced to a minimum within more than a decade. Thus, over four-fifths of academics have currently attained a doctoral degree. Over two-fifths of them are over 50 years of age (Ministry of

Education, Youth, and Sports 2018). The “hybrid” of neo-liberalization began to assert itself during this period (Kascak 2017:163). The doctoral studies programs in educational sciences became gradually more focused on basic research in 2007, which was related to the governmental support of science and education. Full-time postgraduate students received a scholarship equal to a minimum wage during their studies, and their health insurance and social security contributions were paid up until the age of 26. As of January 20, 2016, the overall number of higher education students was 327,000. There were 24,000 (7%) in doctoral degree programs (Eurydice¹). Longitudinal research data indicate that many students do not even complete their studies. The share of doctoral study graduates in the overall number of graduates is significantly lower in the analyzed period 2001-2016 and varies between 2.5 up to 4.6 %; it was approximately 3.0% in 2016 (Beneš, Kohoutek, and Šmídová 2017:4). The above-mentioned facts take us back to the Durkheimian statement that education is merely the function of society (Durkheim 1922:60), and that the teaching of the discipline is an important part of its existence (Gulbenkian Commission on the Restructuring of the Social Sciences 1996; Burawoy 2007). Students and teachers act in a way usual in society and adopt patterns passed on to students. Some of them become their teachers’ colleagues, more or less influenced by the neo-liberal ideology of the established educational policy (cf. Archer 2008:281-283), threatening idealized university values. This contribution focuses on an analysis of the neoliberal structure of the higher education policy of the Czech Republic in the field of doctoral studies, namely, educational sciences, and outlines its possible impacts in the area of higher education.

The objective of the contribution is to analyze the neo-liberal structure of the higher education policy of the Czech Republic in the field of doctoral studies, namely, those of educational sciences, and its possible impacts in the area of the labor-market integration of graduates and university training of academics. The objective is attained through an analysis of legal documents regulating the conditions of doctoral studies, as well as data on the situation in Czech higher education including the rate of graduates from doctoral studies since 1998, the date of the new Higher Education Act (Czech Republic 2017).

Education for Professions

Goode (1960:902) introduces his paper on emerging professions in medicine, psychology, and sociology with the sentence, “The industrialization of society is a professionalization of society.” This symbolizes the shift from the missions of higher education professions to the production sphere, which changes the optics of higher education.

Modern higher education systems are no longer dominated by the arts and the sciences. These core subjects have been overlaid by layers of professional education—the liberal and technical professions, principally the many branches of engineering, and the technical sciences that accompanied the successive waves of industrialization including the latest wave of the information sciences; the caring professions which were stimulated by the growth of the welfare state; and most recently the new upsurge by the enterprise professions, centred upon business, management, and accountancy. The next wave may well have the environmental sciences at its core. [Gibbons et al. 1994:77]

Economic rationality is based on the incomprehensibility of processes. Homo oeconomicus is the only

¹ See: https://eacea.ec.europa.eu/national-policies/eurydice/home_en. Retrieved December 21, 2020.

island of possible rationality within the economic process, whose uncontrolled character not only does not deny, but also rationalizes the atomic individual such as *homo oeconomicus*. The world of the economy is thus opaque from its nature (Foucault 2008:282). The influence of the concept of governmentality (Foucault 1988:18-19) can be seen in the discussions based on already established “truth regimes” such as marketing, performance, and standards. By means of these “regimes,” people exercise power and manage themselves and others (Ball 1994; 2016). The discourse of education not only represents and creates reality but also masks the created nature of social reality by denying alternatives (Trowler 1998). Policy-makers can limit the way of thinking about education in general and educational policy in particular, namely, through the language, in which the policies are created. The use of discourse repertoires rooted in entrepreneurship, marketing, and finance is one of the ways of achieving it. Franchising, accumulation of credits, conveying study outputs, skills and competences, skill audits, and others have become part of everyday discourse and structure the way the actors (candidates, students, etc.) think about education (cf. Olssen and Peters 2005). Policy-makers also work, however, on eliminating other possible ways of conceptualization of the character of education (Trowler 1998:132-133).

Along with the expansion of higher education (cf. Trow 2007; OECD 2019), standardization of the structure of study programs takes place. This standardization of study programs has gradually proceeded from lower study levels to the highest ones. There are two aspects of the standardization of study programs. The first aspect is standardization on the level of study grades, while the second one is represented by evaluation of study by means of ECTS. Both the levels are related to internation-

al UNESCO conventions through ISCED and EU through the Bologna Declaration (Štech 2011). Thus, standardized professionalization gradually permeates requirements in higher education. Along with the change in the educational policy of Czechoslovakia and subsequently, of the Czech Republic, the socialist concept of education shifted via emphasizing a wide range of knowledge to the gradually increasing trend consisting of the narrow, pre-graduate professionalization of university students. The above-mentioned trend is understandable in the case of the two first grades of higher education, however, the share of tertiary-educated graduates is below the EU average (OECD 2019). Education at universities in the Czech Republic is no longer understood as sharing of knowledge, development of skills, or personal development, it is instead the training of a labor force providing what is required by the labor market at all levels. Graduates from the first and second grades of full-time and part-time studies head directly for the labor market where supply and demand get balanced according to the prices prevailing on the market (Pabian, Šima, and Kynčilová 2011). The situation is different, however, in the case of doctoral studies. As demonstrated by Mareš (2013), using the case of the doctoral study program in Education, an average of 42 students graduated from this study program in 1999-2011. Most of them were, however, only integrated into the community of scholars with great difficulties, if at all. Interest in doctoral studies in the field of humanities, namely, educational sciences, has been decreasing, and this is why the graduation rate is increasing. Thus, the question is who will teach the next generation if the generation trained in this way provides its labor force where the highest price is obtained, and thus will not enter the academic environment. What is more valuable on the market?

Tensions between Teaching and Research

Due to coping with economic growth and comparability of university production, the objectives of higher education institutions have shifted towards carrying out research, the publication of its outcomes, and application of research outcomes in technologies. Thus, the time dedicated to direct teaching and training of young minds has decreased, as stated by Gibbons (1994:78), Pritchard (2005), and others. "It becomes increasingly difficult to sustain a coherent undergraduate curriculum weakening even further the traditional concern of the universities to provide trained minds" (Gibbons 1994:78). This has brought about, however, the application of technologies in teaching and gained more time for research. Technologies of distance education and textbooks for distance learning, created at the end of the 1970s for updating knowledge in technical professions where changes were quickest, were also applied at universities, even in the humanities and social sciences that are related to the interpretation of opinions, reasoning, and understanding. A possible conflict appears here between conveying single limited knowledge in contrast to knowledge as a capacity for social behavior, as discussed by, for example, Nico Stehr (1994). The question is whether such knowledge conveyed, taught in this way, is not losing its research capacity. Gibbons and colleagues (1994:79) point out that "Teaching and research may occur in different places and be funded from separate sources. Intellectually they may grow apart because technology-assisted teaching needs to be highly structured while research will deal increasingly with indeterminate knowledge."

This idea of Gibbons and colleagues (1994) is already carried out when his two research modes are applied:

- Mode 1: The complex of ideas, methods, values, and norms that has arisen to control the diffusion of the Newtonian model of science to increasing numbers of fields of inquiry and ensure its compliance with what is considered sound scientific practice.
- Mode 2: Knowledge production carried out in the context of the application and marked by: transdisciplinarity; heterogeneity; organizational heterarchy and transience; social accountability and reflexivity; and quality control which emphasizes context- and use-dependence. These are results from the parallel expansion of knowledge producers and users in society.

What should contribute to the reduction of tension between research and teaching at universities is the concept of teaching excellence pointing out the importance of teaching. Its application is merely, however, another tool of industrialization of higher education with the view to economic efficiency and ranking (Skelton 2005), which can result in teachers' negative attitudes towards teaching (Skelton 2013). Teaching consequently becomes more and more measurable thanks to learning outcomes, competencies, and teaching excellence.

Social sciences, including educational sciences, have been disciplines requiring thinking about social phenomena on the basis of acquired knowledge and skills, arranging them in systems, and assuming attitudes on the grounds of them. This is why education in the social sciences requires a great deal of discussion and explanations which cannot be simply tied down in textbooks for distance learning to be used in the profession. Excessive simplification of the social sciences has resulted in models known

in the form of social engineering (Podgórecki, Alexander, and Shields 2014) or praxeology (Kotarbiński 1965). Both these movements can have their positive sides for not very specialized work, however, with the increase in specialization, work requirements become an obstacle rather than a motor, namely, in doctoral studies that are designed as training for routine research, carried out correctly, but still original. In addition, another concealed prerequisite appears: graduates from doctoral study programs frequently find themselves in the position of university teachers. Does the doctoral study curriculum involve specialist knowledge and skills, realization, and presentation of research outcomes, as well as the knowledge and skills needed for transferring, teaching the discipline?

A university graduate is a worker with certain/individualized competencies that are offered on the labor market, and when the labor market begins to use them, their price increases; when they wear off, the price drops. The investment in education is being mentioned in the way that homo oeconomicus, as an enterprise, sells individualized competencies on the labor market (Foucault 2008:226). By comparison, this perspective also views migration as an investment, while an immigrant is an investor. They do business with themselves and make investments to improve their standing (Foucault 2008:230). Individuals are regarded as businesses, that is, investments/investors. Their living conditions are incomes from the capital (Foucault 2008:232-233). In the case of Ph.D. students, do graduates invest in the development of their teaching skills when the neo-liberal state highlights research competencies only?² The

² To maintain objectivity, it is important to state that Schultz (1968:331) describes the three major functions of higher education as discovering talent, instruction, and research in the context of human capital development, that is, one of the categories of neo-liberalism.

paper will present the results of an analysis of doctoral study programs using Foucault's approach to power and economics in education. Does a Ph.D. student act as homo oeconomicus (business) in the development of teaching competencies or research competencies when the neo-liberal state only mentions the research competency?

Doctoral Study Programs in the Educational Sciences

Doctoral study programs are covered by both educational policy (EUA 2007) and specialized studies (Hakkarainen et al. 2016; Walker and Yoon 2017). Doctoral study programs are of varying characters: individual study programs, structured study programs, doctoral schools, or combinations of the above-mentioned, as shown in Table 1.

Table 1: Organization of doctoral education

Organization of doctoral education	Number of countries	Countries
Individual education only (1)	5	Bosnia-Herzegovina, Cyprus, Georgia, Malta, Montenegro
Structured programs only (2)	4	Croatia, Estonia, Lithuania, Spain
Doctoral/graduate research schools only (3)	3	France, Liechtenstein, Turkey
Mixed (1) and (2)	12	Andorra, Austria, Belgium-Flanders, Czech Republic, Greece, Iceland, Ireland, Latvia, Poland, Romania, Russia, Slovak Republic
Mixed (2) and (3)	2	Italy, Norway
Mixed (1) and (3)	2	Belgium-Wallonia, Netherlands
Mixed (1), (2), and (3)	9	Albania, Armenia, Germany, Denmark, Finland, Sweden, Switzerland, UK, and Scotland

Source: EUA (2007:9).

The Czech Republic opts for structured study programs, as well as individual study plans for students. There is still the question as to which approach to doctoral studies is more advantageous. The answer is influenced by a range of variables, ranging from the field of study, individual or team research (Hakkarainen et al. 2016), up to the form of study (full-time or part-time).

In the case of study programs in the field of educational sciences, it is debatable to what extent it is possible to standardize particular stages of the study. The standardization of study programs in the field of teaching is frequently limited at the national level, and as ushered in by Durkheim's (1922:60) statement that education is a function of society, currently of the state of neo-liberal constituted society; from this perspective, teaching or special pedagogy is frequently a profession regulated by the state at the two first levels of university study, for example, in the Czech Republic. The situation is different in other study programs in the field of educational sciences apart from teaching and special pedagogy that are usually of an academic character or can be found at the third level of university study.

Paradoxes Produced by the State's Neo-liberal Educational Policy at the Level of Doctoral Studies: The Case of Educational Sciences in the Czech Republic

"Doctoral degree programs are aimed at scientific research and independent creative activities in the area of research or development, or independent theoretical and creative activities in the area of the fine arts" (Czech Republic, Higher Education Act 2017), and their contents are focused primarily on training of scientists and researchers. The following parts of the paper present the results of an analy-

sis of government regulations (Government of the Czech Republic 2016a; 2016b; Czech Republic 2017), annual reports on Czech higher education (Ministry of Education, Youth, and Sports 2018), OECD reports (2019), as well as an analysis of the curriculum of doctoral study programs in the field of educational sciences from all the Czech public universities providing these study programs in 2018. The results have led to the formulation of the following three paradoxes.

Paradox 1

The character of an academic doctoral study program; or the professional version of a doctoral program?

- A. The concept of the third grade of Ph.D. university study is only academic, there is no professional version.
- B. A special feature in the Czech Republic is the so-called advanced Master's degree, rooted in tradition and having no qualification significance for the labor market and higher education institutions.
- C. The design of the accreditation of doctoral study programs should be thematically aimed at the area of application (Government of the Czech Republic 2016b). Academic doctoral study programs are usually focused on basic, not applied research.

The current strategy of educational policy introduces standardization of academic study programs aimed at research and innovation, typical of the technical and natural sciences. The question is how this standardization can benefit the social sciences,

educational sciences, and not result in social engineering or praxeology.

Paradox 2

Training of university teachers who are holders of at least the doctoral degree of education.

- A. The doctoral study, defined by the Higher Education Act, is aimed at training of researchers, not that of university teachers. The share of courses focused on teaching skills is minimal or none in the study plans of doctoral study programs.
- B. University wages of graduates from doctoral study programs do not correspond with the length of study. If candidates act as *homo oeconomicus* in the sense of the neo-liberal perspective, they do not choose doctoral studies as the next stage in their life career.
- C. Graduates from doctoral study programs at universities where research is funded with grants is carried out to participate more in research and minimize their share in teaching.
- D. Science and research in the Czech Republic are carried out within the post-socialist model of the Academy of Sciences vs. universities. Candidates primarily interested in science and research aim at research organizations of the Academy of Science type.

Historically, there are various concepts of competencies of academic staff at universities. Wilhelm von Humboldt (1970) writes about the interconnection between research and teaching at German universities. Henry Newman (1886) states in the environment of the UK that there are two methods of

education at universities: one is philosophical, the second is mechanical; the former deals with general thoughts, while the latter is concerned with what is particular and outer. Karl Jaspers (1959) identifies three functions of higher education institutions in Germany in the second half of the twentieth century, namely, research, education, and teaching, and states that not everybody has to be capable of teaching, even though one is an excellent researcher. Skelton (2012) distinguishes between “teachers,” “mixed professionals,” and “teaching scientists” in this context. Doctoral study programs in the Czech Republic train, however, only for science and research.

Paradox 3

The system of study program accreditation at Czech universities permits the guarantee of Bachelor study programs and their core courses by Ph.D. bearers.

- A. Graduates from doctoral study programs do not have courses focused on teaching a specialization at universities in their study plans, they are specialists in a branch of science.
- B. Evaluation of a doctoral study program accreditation does not explicitly follow the structure of the study program for the training of teaching, only for research.
- C. The accreditation system requires and follows teachers’ scientific and research competencies, not teaching competencies.

In the Czech Republic, doctoral study programs provide their graduates with opportunities to guarantee courses in study programs and entire study programs at the Bachelor’s level of study together

with publication activities available after graduation from their studies. Despite not acquiring competencies for preparation of lessons, for designing study programs, and evaluation of teaching, they are adequately prepared in all these fields according to the Higher Education Act.

Discussion and Conclusion

There have been a number of changes in higher education policy in the Czech Republic since 2016, including orientation of doctoral studies in accordance with the National Research and Innovation Strategy for Smart Specialization of the Czech Republic (National RIS3 Strategy) of the Ministry of Industry and Trade (Government of the Czech Republic 2016b). The said document directly interconnects doctoral studies with economic impact. Doctoral studies should introduce innovations into the industry, similarly to other countries (Torka 2018). Thus, the question arises as to what the impact of this trend can be on doctoral studies in the field of educational sciences. The new concept of doctoral studies in educational sciences is forced to be aimed, not at understanding the education phenomena, but their changes (Baltodano 2012), innovation, and commercial application, similarly to other doctoral studies (Hancock, Hughes, and Walsh 2017). In some other countries, professional doctorates are discussed in this context (Altbach 2007), which is not the case in the Czech Republic. There are also changes in the set-up of accreditation conditions of study programs at higher education institutions in relation to Government Regulation No. 274/2016 Coll., of August 24, 2016, on standards for accreditation in higher education (Government of the Czech Republic 2016a), allowing the guaranteeing of Bachelor study programs by doctoral study programs graduates and not more experienced academics.

Preparation of doctoral study program accreditation is currently regulated by the National Research and Innovation Strategy for Smart Specialization of the Czech Republic (Government of the Czech Republic 2016b), currently administered by the Ministry of Industry and Trade of the Czech Republic. Thus, the neo-liberal logic directly penetrates “bodies of academics” (Foucault 2008) and circulates through academic spaces to and fro and among them. New opportunities open up for Ph.D. program graduates if they complete their studies.

The paper has pointed out the paradoxes in the diverse concepts of Czech educational policy, namely, to prepare researchers within doctoral study programs for basic and applied research, as opposed to establishing expectations laid on these graduates to guarantee bachelor study programs without a deliberately developed essential competence to teach.

If we accept the thesis formulated by Richard Pratte (1987:469) that “the exclusive function of the school is service to the society,” similar to the hundred year older idea by Émile Durkheim quoted in the introduction, doctoral study programs will keep training graduates for science, research, development, and innovations on condition that they enter these study programs with this objective in the field of educational sciences. The graduates will enter the labor market and some of them may actually find employment in science and research. As Foucault states, the market thus becomes some kind of place of truth where the governmental practice is verified and disproven and where, in general, “the real value of things is set.” Political economics becomes the central tool of liberalism, or—in Foucault’s words—“liberal governmental practice” consuming freedom (cf. Foucault 2008:63). Specifically, graduates from doctoral study programs in

the field of educational sciences, who do not find employment there due to the established governmental practice heading towards the National Research and Innovation Strategy for Smart Specialization of the Czech Republic (Government of the Czech Republic 2016b), may end up at universities, but without competencies for teaching and designing study programs. With regard to the governmental regulation on accreditations, they will not be interested in guaranteeing study programs, but will engage in research exclusively. Or they may

not be interested in doctoral studies at all. How will graduates from a doctoral study program in educational sciences act as homo oeconomicus?

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Post-Foucauldian Discourse and Dispositif Analysis in the Post-Socialist Field of Research: Methodological Remarks

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Keywords:

Discourse Analysis;
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Neoliberalism; Post-Socialism; Central and Eastern Europe

Abstract: Post-Foucauldian discourse and dispositif analysis, a methodological approach inspired by the work of Michel Foucault and developed in Western Europe, over the last decade has gained an increasing amount of attention from Eastern European researchers. Yet, this interest has not been accompanied by sufficient reflection on the post-Foucauldian perspective's adequacy for studying power, governance, and subjectification in post-socialist societies. In particular, there is little criticism that would take into account the current discussion on Foucault's ambivalent attitude towards neoliberalism. The goal of this article is to examine this line of criticism of Foucault's late works and to point to its importance for dispositif analysis carried out in Eastern and Central European societies (e.g., Poland) in comparison to analyses carried out in Western Europe (e.g., Germany). I propose a number of methodological recommendations that aim at adapting post-Foucauldian research instruments to facilitate analyzing power relations in the post-socialist context; these include: an interdisciplinary combination of discourse analysis and an analysis of macroeconomic and macrosocial factors; an analysis of the practices of normalization in post-socialist societies with reference to the Center-Periphery relationship; introducing elements of semiology, anthropology of the contemporary and cultural identity analysis to dispositif analysis.

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A conversation with Zygmunt Skórzyński, who quoted an opinion of a French sociologist: in America, they have very well-developed research tools, but no problems as such. And they produce second-rate ideas. In the USSR, they have real and complex problems, but no research tools. In Poland, there are both real problems and an elaborate set of research tools. Aren't there? I was delighted with this opinion of a foreign scholar. [Zawieyski 2011:601 (trans. MNF)]

The anecdote opening this article dates back to 1958 and comes from the diaries of Jerzy Zawieyski, a Polish intellectual and writer. He quotes, after Zygmunt Skórzyński, a sociologist and activist of the Catholic intelligentsia, the praise of Polish sociologists' research tools, which was supposedly made by a scholar from France, from the West. According to Remigiusz Rzyński (2017:165), that foreign scholar was Michel Foucault, who between 1958 and 1959 stayed in Warsaw as the head of the Center for French Culture at the University of Warsaw and with whom Skórzyński, as a member of Warsaw's Crooked Wheel Club (*Klub Krzywego Koła*, a club of the Catholic intelligentsia), might well have spoken. The text devoted to the history of madness in Western social discourses that Foucault (2006) was then working on could be treated as a sociological study rather than a purely philosophical or historical work; one should not then be surprised by the fact that Foucault was labeled as "a sociologist."

There are, however, so few testimonies of Foucault's stay in Warsaw that it is by no means certain that the above-mentioned opinion was expressed by him. Yet, today without Foucault the anecdote loses all its charm. The essence of this story is the fact that

a legendary thinker (who, of course, was not yet legendary in 1958), praised Polish social sciences while criticizing American and Soviet research. Coming from the civilizational center of Europe, he boosted the self-esteem of the peripheries not only by comparing its accomplishments to those of the Western countries, but also to those of the USSR, on which Poland was at that time politically and economically dependent, also in the area of social research. For Polish sociologists and humanists, deprived of access to many international channels of scientific communication by the communist regime, words such as those attributed to Foucault expressed a strong desire for appreciation from those who, while setting the tone in global science, were usually blind to what scholars from Eastern Europe had to offer. The long-term dependency on the USSR, which might be compared to a colonial relationship, especially in terms of political dominance (Moore 2001), shaped the perception of Poland as the Periphery of Europe, jammed between two Centers: the Western (praised by the majority of Polish society) and the Eastern one (which put a direct imprint on the every-day reality) (Bielska and Wróblewski 2017) and resulted in an inferiority complex among Polish intelligentsia with regard to their civilizational position defined against that of Western European intellectual elites which served as a reference point (Zarycki 2014).

In post-socialist Europe, this inferiority complex has not disappeared. For scholars from Eastern and Central Europe, what was at stake within the peripheral field of social sciences was not so much being recognized in the West as a distinct research "subculture," but being included in the academic world *despite* representing Europe's peripheries (Warczok and Zarycki 2014; 2016). What often served as a means to this end was uncritical copying of theoretical and methodological frames borrowed from the Center,

without taking into account the specificity of the local context of empirical research. With this in mind, in this article, I discuss the methodological aspect of the post-Foucauldian perspective.

The post-Foucauldian approach to discourse, power, and the subject is a heterogenic and multi- and interdisciplinary way of studying the relationship between knowledge, the discursive and ideological aspects of social communication, and the practices of governing society. The key terms in this approach (e.g., discourse, *dispositif*, knowledge, power, governance) are mostly defined based on Foucault's texts. Yet, his works are not the only point of reference. This is, for instance, conspicuous in empirical studies where post-Foucauldian researchers take inspiration from other sources (e.g., sociology of knowledge, critical linguistics, or symbolic interactionism). The post-Foucauldian approach comprises, *inter alia*, discourse analysis within the framework of governmentality studies (Angermüller and Van Dyk 2010), *dispositif* analysis (Jäger 2001; Bührmann 2005; Bührmann and Schneider 2008; Raffnsøe, Gudmand-Høyer, and Thaning 2016), sociology of knowledge approach to discourse (Keller 2011; Bosančić and Keller 2016), and subjectivation analysis (Keller, Schneider, and Viehöver 2012; Bosančić 2018; Bosančić, Pfahl, and Traue 2019). Post-Foucauldian methodologies share the concept of multiplied power actualizing itself in social practices, including the production of knowledge and theoretical discourses (Diaz-Bone et al. 2007). Discourse, as an object of analysis, is understood here as a set of enunciations (with their material grounding), the production of which is "[in every society] at once controlled, selected, organized and redistributed by a certain number of procedures" (Foucault 1981:52). In empirical research, discourse refers to the production of meaning which turns any form of discursive prac-

tice into a strategic tool of the actualization of the order of knowledge.

Developed since the late 20th-century in the West, Post-Foucauldian methods have recently been gaining more and more attention from scholars from Eastern Europe, including Poland. This interest has not been accompanied, however, by sufficient reflection on the theoretical and methodological adequacy of the post-Foucauldian perspective for studying power, governance, and subjectification in post-socialist societies. This is closely connected with the critique of the neoliberal bias in Foucault's late thought. For many of his admirers, Foucault was a thinker who went far beyond the Kantian and Nietzschean critique of Western culture and was often a step ahead of his contemporaries. However, in the field of contemporary Foucauldian studies, this label of a postmodern, anti-Hegelian prophet with an anarchist message seems to no longer fit snugly. "Michel Foucault was a far-sighted theorist, but also a creature of his time," Samuel Moyn points out (as cited in Zamora and Behrent 2016:I). To put it more precisely, Foucault was primarily a creature of a given geopolitical space and of a particular form of rationality in which he articulated his concepts.

In the first part of the article, I discuss Foucault's alleged endorsement of neoliberalism and, in particular, its impact on *dispositif* analysis. In the second part, I investigate the specificity of the post-Foucauldian research carried out in the Central and Eastern European context (i.e., Poland) in comparison to analyses performed in Western liberal democracies with developed capitalism (i.e., Germany). To illustrate my arguments, I will focus on educational discourses and practices because of their significance for the subjectification of individuals. In the closing remarks, I propose several research guidelines for

dispositif analysis conducted in Poland, where this methodological perspective has been systematically gaining visibility among social scientists. The aim of these postulates is to confront post-Foucauldian conceptual devices with the local specificity of analyzed discourses and social practices.

Foucault: A Creature of His Place and Time

What is usually highlighted in Michel Foucault's intellectual biographies is his professional duality. While critics willingly point out his misguided actions and statements as a public intellectual and an activist, his academic and theoretical preoccupations are regarded as relatively impregnated against the impact of his politics and views embedded in a certain social context (Eribon 1991; Macey 1993; Sarasin 2005; Fisch 2011; an exception is the biography by Miller 1993). The consequence of such a representation of Foucault is the fact that he is regarded, according to Daniel Zamora (2014), as "an untouchable figure within part of the radical left," and the general tendency to draw "the far too consensual image of Foucault as being in total opposition to neoliberalism at the end of his life."

Even Paul Veyne, in his text *Foucault: His Thought, His Character* published as late as 2008 in French and two years later in English, rejects the tendency to reduce Foucault to being "the product of a certain line of '1968 thinking'" (Veyne 2010:1). He points, however, to the fact that the discourse formulated by Foucault was a result of discursive practices marked by a specific *episteme* and set-ups regulating its production. Escaping the limitations of one's thinking is possible through inventing a new discourse that may not replicate the limitations of an old one, but still has boundaries delineated by the historical

a priori. In other words, thinking is not ideological by itself, but it is defined by a discourse that determines one's perception of reality (Veyne 2010:13, 27-29). By consistently calling Foucault a skeptic and "a good positivist," Veyne (2010:108, 118) suggests that the particular and material circumstances of the production of theoretical discourse put their stamp on Foucault's work, which he must have been aware of, rejecting philosophy's claim of discovering a universal truth and transcendental values, and, in effect, refusing to address in his research the social aspects of contemporary capitalism and consumerism.

Stuart Elden (2016a) points to this problem explicitly, claiming that in the studies of Foucault's thought, his "political activism and engagement with contemporary problems [are] underappreciated." However, he highlights that "[q]uite how he combined that activism with the academic work is difficult to grasp" (Elden 2016a), since Foucault's work was always based on archival research, which made his conceptions and terms historically and geographically specific. Adding to that the question of public activity, which is difficult to fully separate from academic work, one cannot ignore the problem of using Foucault's perspective for analyzing other historical periods or political and cultural spaces. According to Elden (2016a), taking into account the discrepancies between the analyzed portion of social reality and Foucault's writings "would be truer to his spirit than uncritical applications."¹

¹ Such a critique of Foucault has been looming over the post-Foucauldian approach to discourse and power since its early days. Since the late 1980s, post-Marxist subaltern studies have argued that the Foucauldian model of power/knowledge and discourse should not constitute one of the main inspirations for postcolonial theory, but turn into an object of deconstruction as a pure derivative from the Western European tradition of critical reasoning and subject positioning (e.g., Spivak 1988; Ahmad 1992; Nichols 2010).

Foucault's Evaluation of Neoliberalism

Already in his 1993 controversial biography of Foucault, James Miller (1993:310) notes with regard to the lectures delivered at the Collège de France in early 1979 that the thinker “turned his own attention to modern liberalism, analyzing its character with unprecedented sympathy.” Today, his ambivalent attitude towards the post-1968 Left in France, his harsh criticism of the welfare state and social security, his sympathy for the negative income tax proposed by Milton Friedman and by Lionel Stoléru in France, and the ambiguities in his evaluation of neoliberalism, found mostly in the abovementioned cycle of lectures published in 2008 as *The Birth of Biopolitics*, are debated as major shortcomings of his thought. In *The Birth of Biopolitics*, he elaborated on the concept of *governmentality*, the rationality of governing people through managing their freedom in the framework of political economics and thanks to a strategic operating device, *the dispositif of security*, which functions as a tool of the selection of meaning which is socially legitimate, utile, and presented as the truth (Foucault 2008; see also Lemke 2001).

The question of Foucault's attitude towards neoliberalism was raised many times after his death (e.g., Larner 2000; Behrent 2009), but the debate has become heated only in the last decade. In 2012, a conversation took place between François Ewald and Gary Becker, in which they both, although starting from different standpoints (and Becker admitting to not having “read much of Foucault”), came to the conclusion that Foucault had offered an “apology of neoliberalism” concerning its non-disciplinary, subjectifying logic of governing people (Becker, Ewald, and Harcourt 2012). In the same year, Geoffroy de Lagasnerie, in *La dernière leçon de Michel Foucault* [*The Last Lesson of Michel Foucault*] (2012), argues that Foucault

proposed not a dogmatic but an experimental interpretation of (neo)liberalism, rooted in the critique of sovereign and disciplinary power, and in the perspective of the microphysics of power. Seen from this angle, neoliberalism is a “tool of the critique of reality and theoretical thought,” “a kind of experimental dispositive,” an invitation to rethink the relationship between the state, the market, and individual freedom through a rejection of the language of the state in favor of the concept of economic rationality, and, most of all, “a purely intellectual construct” formulated as a refreshing theoretical proposition for the Western Left (Lagasnerie 2012:29, 148, 174-175 [trans. MNF]). Lagasnerie's point of departure is a diagnosis of the futility of the contemporary critique of neoliberalism, which, in his opinion, revolves around the same arguments and clichéd ways of understanding neoliberalism. They are opposed by Foucault, who sees neoliberalism not so much as an ideology of the dominant class, but a non-totalizing art of governing individuals, which takes into account their diversity and gives them a margin of independence from the rationality of government. Neoliberal governmentality moves away from a disciplinary regulation of people's conduct, and towards their nondirective optimization or even de-subjectification (Lagasnerie 2012:12, 35, 57, 155, 175).

A further step is taken by critics who see Foucault's work as incorporating neoliberalism into the theoretical discourse. What serves as a highly debated example of such a “deconstruction” of late Foucault is the volume *Foucault and Neoliberalism*, edited by Zamora and Behrent, published in 2014 in French and 2016 in English. Foucault is charged there with misreading the productivity of economic liberalism, having an indefensible faith in the emancipatory dimension of neoliberal power, and focusing on identity struggles and on groups excluded from the neo-

liberal forms of employment or, in general, from the governmental mode of subject-making (such as the mentally ill or prisoners), instead of standing up for the economically exploited majority. He is accused of justifying the shift in the left-liberal policy away from the struggle against social inequalities as such, towards the limited counteracting poverty as a final result of structural inequalities. In consequence, he is labeled as an anti-statist, an enemy of economic interventionism and social security. As Behrent (2016:185) claims,

the tragedy of Foucault thought is that the conceptual tools he had so skillfully deployed to shine a withering critical light on postwar society proved distinctly less trenchant when directed at the emerging neoliberal order—the contours of which, at the moment of his untimely death in 1984, Foucault could only have glimpsed in the vaguest of terms.

In this context, Mitchell Dean (2018:43) offers a more neutral view of Foucault's attitude towards neoliberalism. Firstly, for Foucault, neoliberalism meant “not simply a philosophy of freedom and the market,” but a practical form of “governing states and other organizations” and finally individuals. Secondly, neoliberal governance was favored by him as a post-disciplinary system

in which the field is left open to fluctuating processes, in which minority individuals and practices are tolerated, in which action is brought to bear on the rules of the game rather than on the players, and finally in which there is an environmental type of intervention instead of the internal subjugation of individuals. [Foucault 2008:259-260]

In other words, neoliberal governmentality is about governing people, but with a considerable margin of

freedom in comparison to former modes of governing the people. Thirdly, at that time, Foucault was one of the first scholars who not only politicized neoliberalism as a set of strategic practices of governance, but saw it as critically problematizing the social order of his times, rather than being a supra-structural economic project. Fourthly, his analysis of neoliberal subjectivity focuses on ordoliberalism and early American neoliberalism with human capital theory, and not on neoliberalism in all its breadth. Therefore, the argument that he misreads general neoliberal practices of subject-making seems misleading as Foucault's analysis is limited to a few features of the phenomenon. As Dean (2018:50) warns,

When we use Foucault today we can no longer imagine, however, that we have entered a position of safety or that his name invokes an intellectual insurance policy against analytical missteps and naïve political enthusiasms. We should also be aware that there is a struggle going on over Foucault's legacy, including by those who would give us a Foucault consistent with economic or political liberalism.

Sharing some of these reservations, I believe that, in many instances, the ideas of the author of *The Birth of Biopolitics* and of his critics simply do not overlap. Firstly, the subject and aim of Foucault's thought tend to be wrongly identified. It is not making neoliberalism the “subject of sociological theory” or seeing it, in a Marxist vein, as a late phase of capitalism or, in a liberal spirit, a political doctrine (Laval 2018:19, 28, 36, 71). Foucault's goal is a non-economic analysis of a historically defined shift in the way and rationality of governing people as economic subjects; a move away from regulation towards normalization and beyond.

Secondly, the weakness of the criticism in question is its presentism (Specter 2015:368). For example, this

is how Dean and Zamora (2018) conclude their critical review of *Les aveux de la chair* [*Confessions of the Flesh*], the fourth, unfinished part of *The History of Sexuality*, which is read today as an implementation of the project of neoliberal optimizing individual conduct in order to rethink the liberational aspects of the technologies of the self, inherited from ancient ethics and radically transformed by Christianity:

From Trump to Brexit, to the demise of French socialism, the recent disaster of the Italian elections, and the crisis at the Nordic heart of the social democratic model, the folly of this strategic intersection and its evacuation of the problem of economic exploitation and inequality has become all too plain to see.

Despite the accuracy of the remark suggesting that Foucault had not foreseen the alarming direction of the development of neoliberalism and its practices, which have not only not banished the oppressive institutions of the state and market, but have also led to increased inequalities in capitalist economies, this criticism clearly reveals its own ahistorical nature. Foucault's texts on German ordoliberalism, the Chicago school of economics, the program of Giscard d'Estaing's government, and works by Raymond Barre are juxtaposed with the governments of Margaret Thatcher and Ronald Reagan, the Washington Consensus, or the economic crises of the early 21st century. Out of such a battle, Foucault, who died in 1984, cannot come unscathed, even though he never declared that he wanted to study neoliberalism in its Realpolitik version. On the contrary, he highlighted the temporal, spatial, and situational limitation of his analyses (e.g., Foucault 1991:380); he warned against the temptation to read history through a contemporary lens (1976:30-31); in his 1979 lectures, he stressed that the subject matter of his research were the kinds of relationships between the state and society which

were "peculiar to a particular technology of government" (2008:319). Foucault was interested in the response of neoliberal intellectual discourse to the crisis of liberal governmentality after 1968; some scholars see a distant prediction of the contemporary problems of liberal democracies in his reflections on the replacement of the *homo politicus* by the *homo oeconomicus* (Brown 2015:72-80).

The third problem is the textual idealism imputed to Foucault by critics, who tend to use it themselves. Ascribing to him a belief in the ideological honesty of the manifestos of early neoliberalism that he quoted, contemporary commentators often insufficiently differentiate between what Foucault refers to and his own theses. The fact that he never explicitly rejected neoliberalism and stressed the relationship between emancipatory programs and government is misinterpreted as a lack of critical distance towards the subject of his study rather than as a politicization of the neoliberal project (Hansen 2015:297). Seeing Foucault as strongly antipathetic to the state is also misguided. The fact that he writes about "State-phobia" does not mean that he himself shares it (Foucault 2008:75-76). A particular object of his criticism is not the state as an idea, but its specific realization: a police state with a disciplinary power apparatus. He also points to the paradox that the ideas of limiting the state's powers usually contribute to their transformation or increase in other spheres of social life.

Fourthly, criticism of Foucault often works as a *pars pro toto*, at the expense of reflecting upon the whole of his work. Critics quote the same passages, reading them literally and treating them as a source of conclusive declarations. Allegedly, one of the "proofs" for Foucault's neoliberal inclinations is his 1984 statement (Foucault and Rabinow 1984):

I think I have in fact been situated in most of the squares on the political checkerboard, one after another and sometimes simultaneously: as anarchist, leftist, ostentatious or disguised Marxist, nihilist, explicit or secret anti-Marxist, technocrat in the service of Gaullism, *new liberal* [French original: *neoliberal*], and so on. An American professor complained that a crypto-Marxist like me was invited to the USA, and I was denounced by the press in Eastern European countries for being an accomplice of the dissidents. None of these descriptions is important by itself; taken together, on the other hand, they mean something. And I must admit that I rather like what they mean. [383-384, emphasis added]

Foucault does not deny any of the labels attached to him, but he does not embrace any of them, either. One could see this as a practical realization of the postulate to make criticism a permanent research task. At the same time, one may see the attempts at pinpointing Foucault's political worldview as a manifestation of the power he himself wrote about, obligating the subject to confess the truth about themselves (Hansen 2015:292).

Finally, the abovementioned way of reading the lectures on governmentality, though intellectually provoking, seems excessively restricted by his critics' Marxist lens and by a tendency to treat "neoliberalism as the explanatory mechanism" of any pathological aspects of current social and economic life (Hansen 2015:292). As a result, an alleged neoliberal bias functions as an answer which Foucault formulated as a result of his anti-communism and in response to the crisis of the welfare state of his time. When viewed from a post-Marxist perspective, what Foucault actually tried to do seems unimaginable: namely, he attempted to find a potential for the critical art of government in certain forms of neoliberalism.

Post-Foucauldian Methodology and Neoliberalism

The critique of Foucault's theory of neoliberalism has consequences for the application of his method in empirical studies of (neo)liberal practices (e.g., Bröckling, Krasmann, and Lemke 2010; Diaz-Bone and Hartz 2017). In this context, the main objections towards the post-Foucauldian approach concern its ambiguous non-engagement in the critique of ideologies, and a tendency to reconstruct a complex social reality in a reductive manner and to make inferences about the process of subjectification and subjectivation only on the basis of discourse, as well as to reproduce fragments of neoliberal discourse in his analytics of power, which results in the appropriation of governmentality studies by the neoliberal system of the production of scientific discourse (Rehmann 2016). Moreover, what is highlighted as a weakness of the post-Foucauldian perspective is that it overlooks the emotional component of discourse and non-discursive practices, ignores biographic conditions that influence the productivity of power relations and neglects economic and class relationships on the global and local scale, and finally gives little attention to the diversification of democratic and neoliberal capitalist power in societies whose discourses and institutions are analyzed using this approach.

As a remedy, some researchers propose combining the post-Foucauldian approach with other qualitative methods, for example, the biographical method (Tuider 2007; Pfahl, Schürmann, and Traue 2015), the sociology of knowledge (Keller 2011), and intersectional discourse analysis (Paulus 2015) or quantitative methods, for example, correspondence analysis (Hamann et al. 2019). Nonetheless, the problem of Foucault's *worldliness* remains. By worldliness,

I mean what Edward Said (1983) understood as a historical and material grounding of the author and their texts in the social world. In particular, the “worldly” character of Foucault’s concepts concerns *dispositif* analysis. Present in his *oeuvre* from the mid-1970s, the term *dispositif* refers to a heterogenic composition of discursive and non-discursive elements of social reality interconnected with the relations of power (Foucault 1980:194-198). This apparatus responds to forms of power/knowledge emerging within the Western epistemes and heuristic models of government and governed subjects. Hence, the *dispositif* of security related to neoliberal governmentality is a problem-solving operator that functions in the framework of the discourse/knowledge order, which derives from the early neoliberal thought developed in French, German, and American intellectual milieus.

As a perspective to study relations between power, knowledge, the subject, and the truth, the *dispositif* approach focuses on “the processes of the reduction of meaning” (Angermüller 2010:90), caused by discursive and non-discursive practices, as well as by physical objects, which all serve together as a device of power exercised both on subjects and objects (Jäger 2001; Link 2006; Caborn 2007). As an analytical category, *dispositif* “is empirically identified due to a more or less systematic use of a certain methodology” (Bührmann and Schneider 2008:152 [trans. MNF]), aimed at reconstructing in an abductive fashion the relations between orders of knowledge, orders of discourse, practices of subjectification, and its materializations and objectifications in social practices. For discourse researchers, *dispositif* usually serves as a framework to combine textual analysis with analysis of the practical and material context of discourse production and its impact on the subjects (Hoffarth 2013:98-99). Although dis-

course analysis is almost always an essential part of *dispositif* analysis, it is not an occasional discourse, but a particular order of knowledge and the associated discursive and non-discursive practices that create subjects (Schneider 2015:28-29).

The first methodological dilemma stemming from the peculiarity of Foucault’s perspective is connected to the question of whether its direct application of the study of diverse local contexts is justified. The second dilemma stems from Foucault’s attitude towards neoliberalism (in its narrow sense). The analysis of the *dispositif* of security carried out within governmentality studies is connected with a critique of the current influence of neoliberal discourses and public policies on the subjectification of individuals. Meanwhile, what Foucault proposes in his lectures is a genealogy of the subject emerging from a historically and locally specific neoliberal elitist discourse. That is why, in order to use Foucault’s perspective in studying the practices of contemporary neoliberalism, one should either reduce it to a retrospective inspiration or (which seems a more useful choice in terms of its epistemic value) subject it to an empirical test, which is perhaps a *sine qua non* of the (post)Foucauldian sociology of power (Jeanpierre 2006:105-106).

Towards a Post-Socialist Dispositif of Security

One of the fields that are affected by the theoretical and methodological difficulties present within *dispositif* analysis are the relations of power in Central and Eastern European post-socialist and peripheral states,² where *dispositif* analysis is used as a meth-

² Relations of power in Central and Eastern European post-socialist states are not the only field of research where the application of (post)Foucauldian perspective should be preceded

od for a radical reconstruction of power relations between the self, social structure, law, economy, the truth, and the state in the context of rapidly developing post-1989 capitalism and growing individualism in social life (e.g., Czyżewski 2012, Chutorański 2013a; 2013b; Ostrowicka 2015; Nowicka-Franczak 2017). Paraphrasing the question from the title of Laurent Jeanpierre's article—"Une sociologie foucauldienne du néolibéralisme est-elle possible?" [Is Foucauldian Sociology of Neoliberalism Possible?] (2006)—we should pose another question: is Foucauldian or post-Foucauldian sociology of post-socialism possible? Are post-socialist governmentality and its dispositif of security possible, according to Foucault's work? And is dispositif analysis a relevant method for post-socialist research?

The first reservation stems from Foucault's minor academic interest in Eastern Europe, despite his public engagement in political support and humanitarian aid offered to dissident circles. In Eastern Europe, and especially in Poland, where Foucault lived between 1958 and 1959 and where he finished writing *History of Madness*, as he put it ironically, "in the stubborn, bright sun of Polish liberty" (Foucault 2006:XXXV), he is praised for his consistent critique of Stalinism, as well as for his "ferocious hatred of everything that evokes communism, directly or indirectly" (Eribon 1991:194). His *Discipline and Punish* was frequently read by Eastern European readers as an allegory of totalitarian regimes. What makes Foucault so attractive for Eastern European scholars is his image of a Western leftist thinker without a communist bias. However, his attempts at making a link between Western and Soviet mod-

with the initial reconsideration of theoretical and methodological tools and the testing of their empirical adequacy. Another such field is, for instance, Latin American studies where the Foucauldian approach is widely disseminated or the studies of the Global South.

ernization and subjectification practices are rather superficial. In his work on discipline, Foucault made only a vague comparison between Western modernization and the Gulag. In his 1975-76 lectures at the Collège de France, *Society Must Be Defended*, Foucault (2003:260-263) denounced the discourse of class struggle as racist not only in its Soviet extreme version, but also as a tool of any socialist form of power. According to him, the Soviet Union and communist Eastern Europe functioned as police states governed by an administrative force within the logic of socialism—though not in a Western governmental way, but rather in its excess (see, e.g., Foucault 2001a:36; 2001b:64-65; 2001c:401; 2001d:1158).

His late writings include many remarks on socialism, but mostly restricted to comments on its French or German variants. In his 1979 lectures, he rejected the concept of the "autonomous governmentality of socialism," claiming that "there is no governmental rationality of socialism," no "governmental reason" (Foucault 2008:92-93), as socialism functions solely within an economic, historical, and administrative rationality, but does not produce means of "conducting the conduct" of individuals, certain categories of people, and whole populations. Foucault refers to the Marxist origins of socialism, but he does not consider the Leninist reading of Marx's work in terms of revolutionary rationality or their practical realization in Eastern Europe (indeed, he barely mentions East Germany). What interests Foucault in the context of socialism is the possibility of applying some of its elements to neoliberal rationality; this strategy, however, cannot be a symmetrical synthesis of both types of governance (he discusses this using the example of the transformations in postwar social democracy in West Germany [Foucault 2008:88-91]). For him, "socialism can only be implemented connected to diverse types of governmentality. It

has been connected to liberal governmentality and then socialism and its forms of rationality function as counterweights, as a corrective, and a palliative to internal dangers" (Foucault 2008:92). The only remark which refers to the Europe of his time as a whole concerns socialism's attempts at constituting some form of collective economic sovereignty instead of the one superseded by market liberalism (Foucault 2008:283).

In his interviews, Foucault differentiates between Soviet totalitarianism and Eastern European socialism. For example, he points to the strong psychological and cultural relationship between the societies of France and the then Polish People's Republic (Foucault 2001e:804) and to the exceptional role played in Poland by the Church as a mediator between the communist party and the working class, in which he actually sees the tragic ridiculousness of Polish socialism (Foucault 2001f:1088). His remarks on the region do not go beyond journalistic commentary, perpetuating the motif of the oppressive Soviet Big Brother and the dissidents fighting against the regime. Foucault intended to give lectures on the governmentality of totalitarian parties and in autumn 1984, to conduct a seminar on the possibility of a socialist governmental reason which could have been invented rather than deduced from socialist thought, but he did not manage to carry out this plan (Elden 2016b:109-111, 201, 206).

Regardless of the conclusions on socialist governmentality which Foucault could have offered, what interests the researchers in Central and Eastern Europe today is the post-socialist reality: democratic and capitalist, but produced out of the ruins of socialist political economy, having its source in Soviet Marxism and Leninism. I do not use the phrase "out of the ruins" metaphorically but literally, since the

economic and financial inefficiency of the socialist system was the most important factor determining the transformation of the system in the region, along with social mobilization and a favorable international situation. The long-term aim of the transformation was to narrow the civilizational gap between Eastern and Western Europe, measured by individual material and civil aspirations (Gomułka 2016:19; see also Kovacs 1992).

In contrast, Foucault focused on the laboratories of the art of government, on isolated cases of relatively coherent dispositifs of power, supported by a consistent political economy. The situation of post-socialist countries does not easily yield to such classifications. Below, I concentrate on the case of Poland. On the one hand, this country is offered as an example of an effective system transformation from authoritarianism and socialism to democracy and capitalism, leading to economic success in macroeconomic categories (Gomułka 2016:20). On the other hand, the state of liberal democracy in Poland is fragile, especially with regard to civil rights. A prominent place within the public discourse and the symbolic sphere is invariably occupied by nationalist and xenophobic ideas, as well as those characteristics of premodern Christianity (Porter-Szücs 2014). One could speak of Polish material and economic modernization without axiological modernism (Sowa 2015:27f) conditioning the liberal "government through freedom."

The first reforms allowing market business activities in selected industries were introduced in Poland before the transformation (e.g., Wilczek's law of 1988—named after the industry minister at the time, Mieczysław Wilczek). To some extent, the economic transformation preceded the political one, but it gathered pace and was discursively legitimized

only in the critical year of 1989. The strongly imitative character of capitalist discourse, given authority by the Western counselors to the first democratic governments (e.g., Jeffrey Sachs and George Soros), did not and could not (because of the historical and material context) go hand in hand with a similar repertoire of practices and technologies of the self to those described by Foucault in Western contexts. As a result, the imitation has not led to direct copying of the West, but to a hybridization of the forms of governance we see nowadays, for example, to the discord between the discourse of success and the historical necessity of the neoliberal transformation, on the one hand (Kubala 2019:129-145), and the social memory of the period of transformation, on the other (Laczó and Wawrzyniak 2017).

The change towards capitalism, justified by Western European neoliberal discourse of the second half of the 20th century, took place in Poland within a very short period, but did not entail a full formation of neoliberal rationality of government that would be close to the one diagnosed by Foucault, an instrument of which would be a “classic” dispositif of security. One of the tasks of the dispositif of security is minimizing the risk connected to the possible incompatibility of individuals with the rules of the market game—both by normalizing their life aspirations and by affirming individual resourcefulness, which is supposed to guarantee, usually deferred, economic security, as well as by taking care of those who are permanently or temporarily “unresourceful” so that society would not incur losses as a result of their presence (Foucault 2007:11; 2008:65-66).

Comparing Western neoliberal governmentality and post-transformational practices of government, Mikołaj Lewicki (2018:388 [trans. MNF]) states that, “[i]n Poland, it would be difficult to say that organized

modernity in its radical form was implanting the rules of delayed gratification and security for one’s activity (resourcefulness).” On the contrary, the new capitalist social order reinforced a sense of risk and the unpredictability of the social and material situation, normalizing the understanding of the changing conditions as a necessary leap from pre-modernity towards modernity, which was bound to entail some casualties. As a result, in many respects, Poland was in the vanguard of neoliberal changes introduced without sufficient provisions being made for employees, which may be exemplified by the privatization of many sectors of the country’s economy, promoted in the post-transformation discourse and deregulation of economic life, leading to a serious weakening of the nation-state’s power over the flow of capital (Lewicki 2018:406-407).

The post-transformation model of subjectivity promoted in the media and public policy is based only to a small extent on the values of egalitarianism, social solidarity, and liberty understood as free and uncompromising self-expression. It is replaced by liberty directed towards new rationality, which expresses itself in realizing one’s professional and consumerist aspirations within the market game (Kubala 2019:292-301). As a result, in many cases, as Anda Rottenberg, a Polish art critic and curator, puts it, “[i]n Poland, the people who profit from freedom the least are those who have fought for it” (as cited in Hugo-Bader 2016:19 [trans. MNF]).

Calling post-transformation Poland a leader of neoliberal governmentality is, however, a serious oversimplification. Despite the fact that consecutive governments of democratic Poland, regardless of their ideological affiliation, have been using a (neo) liberal economic discourse and juggling promises of increased welfare and of improving the quality

of public services, as their basic political strategy. Such a strategy is also popular in Western liberal democracies, but what is noteworthy in the case of Poland is the justification that is typically provided for the promised solutions. They are supposed to result in narrowing the “civilizational gap” between post-socialist and Western countries and restore the citizens’ dignity (Ziółkowski 2015:159-161). On the one hand, these claims are formulated in opposition to neoliberal capitalism and highlight its negative effects on the individual, such as precarization, growing social stratification, and pressure to subordinate the educational and developmental path to the needs of the labor market (N.B.: these are effects unforeseen by Foucault). Dignity claims are sometimes embedded within a retro-utopian discourse, built upon, *inter alia*, a nostalgia for socialism (Mikołajewska-Zajac and Wawrzyniak 2016), anti-Western slogans (prophesying the moral demise of the West, which “worships” consumerism and cultural liberalism), and a shift back towards the authoritarian rationality of government (Gduła 2018; Szczegółka and Kwiatkowski 2017). On the other hand, the political response to these claims is hybrid, combining the rationalities of the welfare state and neoliberal capitalist policies. For example, the flagship welfare program of the Law and Justice Party [Prawo i Sprawiedliwość] governing Poland since 2015, known as the 500+, offers a direct financial transfer to families with children (instead of tax reductions, school vouchers, etc.). The family is supposed to manage the money transferred by the state on its own. The amount they receive (approximately 116 Euros per month per child) reduces their consumption rather than stimulating individual entrepreneurship.

Social transfers were carried out during the whole period of Polish transformation, and they were not

aimed at encouraging individuals to undertake business activities, but rather at pushing “dispensable” people out of the labor market, for example, through a system of the so-called bridging pensions (the possibility to retire before reaching the statutory age of retirement) (cf. Gomułka 2016:21). One of the recipients of social transfers has been, along with the lower classes and the former working-class, pauperized intelligentsia whose education and expertise are undervalued in the neoliberal labor market. In fact, the concept of the subjectified individual, *homo oeconomicus* or “entrepreneur of the self” who plays a crucial role in the technology of neoliberal governmentality (Bröckling 2007; Foucault 2008:296), does not apply to a vast part of the population in the post-socialist state, raised in the economy of shortage or in the period of a turbulent shift into peripheral capitalism. Whereas the subject-figure of “entrepreneur of the self” is successfully applied in the studies on subjectification practices embedded in a direct transfer of Western neoliberal culture and the discourse of governing the Self (e.g., a study of *coaching* by Bogułębski 2014 or an analysis of the new patterns of parametrization implemented in Polish universities to measure the output of Polish scholars [Ostrowicka and Spychalska-Stasiak 2017]), in the Polish-specific genealogical analysis, this figure seems insufficient to conduct a proper reconstruction of local subject-making processes. I am far from defending a prejudiced concept of *homo sovieticus* as an allegedly typical identity for an Eastern European subject: economically unresourceful, but entitled and politically manipulable (cf. Sztompka 2001:22). Nonetheless, the shaping of a subject in the setting of a country catching up with the West is not only a governing-discursive process, but also a symbolic and emotional one, and this dimension seems unappreciated in the (post)Foucauldian perspective. In the case of Poland and other post-socialist

societies, the more relevant model of a subject may be “a practitioner of the self,” a type of individual who is subjectified not within a given rationality of governing the population, but through their own practices of thoughtful/helpless responding to the conditions of economic and dignity shortages and of symbolic-cultural peripherality.

What fits into the Foucauldian thinking is that in Poland this hybrid and partially imitative form of governance produces a considerable margin of freedom in comparison to the socialist regime (cf. Foucault 2008:22), but primarily in legal or constitutional terms rather than in a microeconomic and socio-psychological perspective. Taking into account the expansive nature of neoliberal discourses in Poland, followed by discursive and non-discursive practices applied with or without “success” in the institutional and private domains, we may speak about *post-socialist market governmentality* characterized by a *dispositif of modernization/civilization security*. The notions of governmentality and dispositif of security refer to Western European narratives and processes. In consequence, the modern change in the art of government in the Latin West, crucial for Foucault, in Eastern Europe, may have appeared as a violent shift rather than as the “natural” fruit of an endogenic metamorphosis of political and intellectual thought. Therefore, the incorporation of Foucault’s concepts into the process of analyzing post-socialist democracies in Central and Eastern Europe should entail a cultural and political translation of this methodology. Otherwise, the use of the categories of governmentality, dispositif, or “entrepreneur of the self” in the post-socialist context should be revisited as an imitative rewriting of the Eastern European experience in accordance with Western narratives and critical theory.

The German and the Polish Dispositif Case Studies—A Comparison

To illustrate the contextual differences that leave an imprint on the analyses, I will refer to two case studies, one German and the other—Polish, which discuss education in terms of the Foucauldian dispositif. I have decided to focus on German and Polish research due to the fact that they are both similar and different. Most importantly, Foucault himself was interested in contemporary German governmentality and its social tools. Thus, German scholars who do research in this field may directly refer to his findings and thus continue his genealogical work. Polish scholars, by contrast, need to search for analogies and differences between Foucault’s concept and local discourses and social practices. In other words, they need to test the Western genealogy and adapt it to the local context. At the same time, both German and Polish case studies that I examine below pose similar questions about the subject that is produced in the process of education—a fundamental social institution for governing people. Education is one of the key concepts of power/knowledge because its institutionally encompasses a social group (children and young adults) that consists of the most susceptible recipients of practices of the self (Ball 2017). The formation of the members of this group as economic and political subjects dictates the directions of society’s development and is a subject of particular concern to those who create public policies.

In Norbert Ricken’s works, education (*Bildung* in German) is conceptualized and operationalized as a dispositif due to its historical and diachronic constitution reflecting the post-enlightenment concept of a free and self-conscious subject that is guaranteed by modern relations of power (Ricken 2006:172ff).

Education as a *dispositif* of security refers to a set of discourses, practices, and institutions which in modernity achieved the commonly accepted status of having no alternative and being irreplaceable in Western societies. This self-evidence and lack of alternatives constitute the power of education (Ricken 2015:41-42). Starting from the famous German philosophers and education theorists, such as Wilhelm von Humboldt and Immanuel Kant, Ricken focuses on the interplay between pedagogic discourses, institutions or practices, and the patterns of subjectification developed and implemented in Germany and other Western European societies in a particular historical moment: the fall of the tradition of the absolutist state belonging to a prince or a king, and a fiasco of the enlightenment and republican idea of the *volonté générale*. This led to the development of the idea of a negative state, refraining from direct interference with its citizens' lives, but focused on guaranteeing them safety. At the beginning of the 19th century, education started being used as an instrument of general normalization of individuals, legitimized by the Kantian dictum saying that one becomes truly oneself only when, as a result of education, one gains self-awareness (Ricken 2015:44-45).

From this perspective, a *dispositif* of education should be regarded as an infra-social category which refers to a specific cultural pattern of interpretation concerning modern selves, their social roles, and fates. Ricken focuses on educational reforms introduced during the reign of the Prussian king Frederick William III and supported discursively by the thought of Kant and Humboldt. In his opinion, the educational changes of that period constitute the core of the social transformation which took place between 1780 and 1820 in Prussia and Western Europe, and which was connected to the shift towards non-disciplinary and pastoral rationality—in the

post-enlightenment sense, stressing the self-education and self-disciplining of individuals, that is subjectivation happening within the frames of a specific form of governing the population. This is why Ricken believes education to be a pattern of interpretation that regulates not only the positive relationship between the individual and their own self, but also all social relations and orientation towards the common good (Ricken 2015:45-46).

Ricken asks whether the diagnosis that education functions as a *dispositif* of security is nowadays accurate (Ricken 2015:46-47). To this end, he confronts Foucault's perspective with, among others, Pierre Bourdieu and Jean-Claude Passeron's concepts of the reproduction of cultural capital through the schooling system. Ricken claims that the educational pattern of interpretation or *dispositif*, though changing in accordance with the demands of the epoch, in late modernity, loses its operating force and becomes a structure of the fading order of knowledge. Ricken does not reject the Foucauldian categories of governmentality and *dispositif*, but he points to their subordination to the functionality of a given social system. What becomes the real goal is not the formation of self-aware social subjects, but of individuals who fit in conventional social relations. Moreover, education can no longer be seen as a field of "ready-made" subjectifying practices; its impact on the self is possible only in a specific way or in connection to other areas of power/knowledge (Ricken 2015:51-55; 2019). To sum up, in Ricken's (2006:199ff) research, which is partially a genealogical reconstruction and partially prospective speculation, the *dispositif* plays the role of a category that is sensitive to the historical and political context, but one that can be functionalized (empirically and theoretically) as a strategic system of discourses, practices, and institutions that influence one another.

In post-socialist Poland, Helena Ostrowicka (2012; 2015) conducted a post-Foucauldian dispositif analysis of the education of teenagers. For this author, governmentality is a general meta-category, which “is bound neither to a single type of rationality (a neoliberal one) nor to one single normativity” (Ostrowicka 2015:23 [trans. MNF]). Consequently, a dispositif is regarded as a social technology that is neither ideologically nor historically determined, but realizes the rationality of any governance. Under this premise, Ostrowicka carries out a dispositif analysis of a nexus of social power, discourse, and state policy, which conditions the desired (according to educational expertise) subjectivity of Polish teenagers. On the basis of post-Foucauldian discourse analysis and the textual corpus of research reports on Polish teenagers published in educational journals, as well as media discourse on a 14-year-old schoolgirl who committed suicide, Ostrowicka (2012:136 [trans. MNF]) distinguishes a dispositif of age, which “makes a link between young age and educational institutions, mainly school, through a space-time of technical possibilities of identification, control, and positioning of the learning subject.” While discussing the dispositif of age, Ostrowicka (2015:177-178) focuses on interconnections between local knowledge about young people and the European Union’s educational policy, as well as on the labor market in Poland and in the EU or social processes of normative change.

For Ostrowicka (2012:36ff; 2015:133ff), the basic theoretical reference is the Foucauldian model of the dispositif of security linked to neoliberal governmentality. In her research in the Polish post-socialist context, she, however, applies a technologically-oriented approach to studying the dispositif. In consequence, the educational dispositif of age functions as a hybrid device of the belated and im-

itative modernization processes, whereas the neoliberal dimension of security serves as just one of the strategies (apart from juridical and disciplinary mechanisms of power) of playing a power game between the Center and Periphery. Ostrowicka does not explicitly problematize this local context, rather trying to universalize her category of the dispositif of age in relation to the system of education as such (at least in the context of the European Union). Still, the conclusions of her research provide an opportunity to ask questions about: 1) the local dynamics of the changes in conceptualizing young adults and students’ status in the education discourse; 2) the mutual relations between Western and Polish discourses and educational practices towards young adults, and 3) the reality of Polish institutions and educational practices conforming to the discourse of the subjectivity of the youth copied from the West. Extrapolated from the field of education, the above-mentioned issues are equally relevant to other areas of post-Foucauldian analyses performed in the local, Eastern European context (e.g., studies of labor, citizenship, or the normalization of sexuality). Each of these cases is connected with the circulation of Western discursive practices and models of social practices. This process is not only conditioned by the local genealogy of power, but also the position of the examined portion of social reality in the network of dependencies between the ideological Center of Europe and its Peripheries.

Conclusion: A Proposal for a “Post-Socialist” Dispositif Analysis

The aim of this article is not to discourage anyone from using dispositif analysis in a post-socialist field of research, but to emphasize the necessity of methodological adjustment and supplementation of the post-Foucauldian perspective in order to minimize

a mechanical imitation of the Western studies on neoliberal power in the Eastern European context. Therefore, I propose a few research guidelines for post-Foucauldian research conducted in post-socialist states such as Poland. Although in my analyses, I have focused on a comparison between German and Polish research, my final remarks are applicable to the post-Foucauldian approach to discourse and the *dispositif* as a whole. As in the case studies that I have discussed, what serves as a challenge for the *dispositif* analysis in the post-socialist context, is critical and self-reflective dissociation from the Western genealogy of power, at the same time, retaining the basic assumptions of the post-Foucauldian perspective on the strategic role of discourse and the *dispositif* in the contemporary art of government. Furthermore, the Foucauldian concepts that serve as analytical categories in the studies of post-socialist power relations need to be supplemented with the local designations whose critical descriptions can be empirically verified. Only then is it possible to use (post)Foucauldian tools to draw conclusions on the models of subjectivity that are typical of a given research field.

In the case of researching the Polish post-socialist art of government, the first step should cover enriched hermeneutic discourse analysis and the analysis of practices connected to it, with elements of macroeconomic, politological, and macro-sociological analysis of the objectivization of empirical reality. Foucault did not do this, concentrating on intellectual discourse. In his case, such a narrowing could pass muster because he analyzed the rationalities of government which emerged historically and evolutionally from the changes in the Western European state and economy, and were not imitative, technocratic, and, to a large extent, implemented in a revolutionary way on top of a collapsing socialist regime. The first step of a “post-socialist” *dispositif* analysis

should be gathering macroeconomic and macrosocial indices referring not only to the gross domestic product or dynamics of economic growth, but also to social stratification and the level of income inequalities. Between 1980 and 2017 the latter in Polish society showed the fastest growth in Europe, according to the World Inequality Lab report (Blanchet, Chancel, and Gethin 2019), which points to the local domination of the neoliberal model of society characterized by market competition, alongside the negative results of this model. However, it is only the confrontation of the abovementioned indices with the indicators of civil liberties, the evaluation of democratic institutions, and the individual assessment of one’s well-being and sense of social justice (e.g., *Diagnoza Społeczna*³ [Social Diagnosis], European Social Survey⁴) that allows one to place the *dispositif* of post-socialist market governmentality within the field of global and local socio-economic relationships.

For the same reason, *dispositif* analysis carried out in Poland should be sensitive to the modernizing and dignity functions of practices activated in *dispositifs* and referring to the tension between the Western Center and the Eastern Peripheries of Europe: both within the intersocietal framework, between economically developed and democratically stable societies and societies which are developing and aspiring to (an idealized) Western quality of democratic social life, and the intrasocietal framework, between those social classes that manage better in neoliberal capitalism and groups experiencing deprivation. At the intersection of these dimensions, one may distinguish the following types of practices of normalization typical in Central and Eastern European societies:

³ See: <http://www.diagnoza.com/>. Retrieved January 03, 2021.

⁴ See: <http://www.europeansocialsurvey.org/>. Retrieved January 03, 2021.

Table 1. The practices of normalization in post-socialist societies with reference to the Center-Periphery relationship

	Modernizing function	Dignity function
Intersocietal inequalities	Modernizing and (anti)Westernizing practices: oriented towards economic, institutional, and axiological “catching up” with Western Europe or rejecting the idea of imitative change	Practices connected to dignity and settling accounts: oriented towards expecting moral and symbolic reparations from the West for historically determining the international position of a post-socialist state
Intrasocietal inequalities	Modernizing and class practices: oriented towards drawing even with the West materially by observing the lifestyles of local elites	Dignity and class practices: oriented towards problematizing the unfair separation of material goods and symbolic positions within a society

Source: Self-elaboration.

Identifying these practices would help define the kind of situation of social crisis that the dispositif of Polish art of government *de facto* answers to: to what extent it is a derivative of a neoliberal political economy, and to what extent—a reaction to social resentments connected to the geopolitical hierarchy of collective entities. Consequently, the category of the dispositif should be conceptualized as a discursive-non-discursive ensemble that is responsive to fluctuations of governing strategies, where the neoliberal component is involved in a game of power with other types of logic of governing people. The analysis of the Center-Peripheric distribution of economic, social, and cultural capital is useful in this context. Still, frequent attempts at linking Foucault’s perspective directly with Pierre Bourdieu’s theory would not work within the context of Eastern Europe. As in the case of Foucault, they could be seen as a quasi-colonial transfer of theories (Bourdieu did not do research on Poland or other post-socialist countries, either). However, there are a few Polish

researchers, for example, Tomasz Warczok and Tomasz Zarycki (2014) and Agata Zysiak (2019), who promote peripheral uses of Bourdieu’s theory, adjusted to the regional fields of power relations.

Moreover, what should be taken into account in this context is the imitative dimension of discourse and non-discursive practices involved in the post-socialist dispositif. Discourse on subjectivation can rather easily be copied from the West, but the discursive imitation does not have to involve the implementation of practices that operate according to given governmentality and fulfill promises made in the westernized discourse (or this implementation is but apparent and the final subjectivation becomes also virtual). In order to minimize the influence of textual idealism on research results, the researcher should focus, on the one hand, on the symbolic function of discourse, institutions, and their practices, and on the other, on individual and collective techniques of facing the peripheral reality.

The abovementioned phase of the analysis should include the reconstruction of post-socialist modes of subjectification. The proposed category of “a practitioner of the self” can serve not only as a kind of umbrella term to gather various types of practices of post-socialist normalization with regard to particular biographic strategies of individuals, but it can be used as well with an aim to distinguish both 1) semiotic messages embedded in the ways of positioning the self towards others (other social classes and groups, as well as other societies, especially Western Europeans) and 2) everyday practices of producing, confirming, or resisting a particular type of local subjectivity.

The first task will be facilitated by introducing to one’s research selected aspects of semiology dealing with the mythmaking function of the linguistic level of discourse, which aims at normalizing the social order (Barthes 1972; in the Polish context, Wasilewski 2012; Napiórkowski 2018). The second one requires opening up to the methods of an anthropology of the contemporary, aimed at researching cultural practices of contemporary individuals and social groups within their “natural,” everyday environment in the context of current relationships between politics, scientific knowledge, and economy (Sulima 2000; Łuczeczko 2006; Rabinow and Stavri-

anakis 2013). Finally, the confrontation of the subject model described by Foucault and elaborated on by his Western European commentators with forms of subjectivity developing within Polish rationalities of government would require asking the question about the local discursive and cultural identity. Here, what is helpful is cultural identity analysis, carried out at the intersection of philosophy and psychology, and developed in Poland, inter alia, by Andrzej Leder (2014) and Piotr Augustyniak (2015; 2019). Despite the fact that Foucault is not the main reference point for these authors, their research fits into the spectrum of poststructuralism, and their goal to contribute to the academic reflection on the cultural and discursive construction of individual existence by introducing the general thesis of “power coming from everywhere.”

The post-Foucauldian perspective has already taken an immense step beyond Foucault’s thought. Eastern European scholars may take another step forward and, to paraphrase Dipesh Chakrabarty, bring this analytics of power to a provincial level so that it could render the specificity of Eastern Europe in an equal dialogue with Western critical theory and prove that the *dispositif* does not constitute a “fancy” category borrowed from the West, but it regulates the crisis and normalizes the post-socialist society.

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The “Illusion” of Social Research/Action. Reflections on Neo-Colonial Pedagogy

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Abstract: In the text, the author demonstrated that regardless of the prevailing regime, the State, by relying on separate laws for people with disabilities (or any other minority group), has created and continues to create colonies of sorts. In the first part of the article, the author presented the difference between postcolonialism and neo-colonialism in relation to people with disabilities and in Disability Studies. Afterward, he highlighted the illusory nature of research and, above all, educational activities in favor of people with disabilities. He argues that in the case of this group of people, we are dealing with neo-colonial pedagogy rather than a postcolonial one.

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Society recognizes only slaves and rulers—rulers who impose their content and forms, and slaves, whom these forms are imposed upon. It does not recognize independent human beings who have no strength to be rulers and will not accept being a slave. [Elzenberg 1994:413 (trans. MJ)]

Regardless of the prevailing system of power, the State, based on a separate law for people with disabilities (or any other minority group), has created and

continues to create colonies of sorts.¹ Our experience, feelings, knowledge, and perception show us that legal regulations and top-down paradigmization of areas of knowledge are mostly meaningless, resulting only in the fact that people with disabilities become slaves to the system of areas and fields colonized by able-bodied and strong groups, who toss them "pieces and scraps of freedoms" from time to time, which are not necessarily adapted to their needs (see: Rzeźnicka-Krupa 2009; Zakrzewska-Manterys 2010; Jabłoński 2016; 2018). People with disabilities, as well as other minority groups, face the fact that educational researchers were late to recognize the importance of culture

¹ Some authors, including Zenon Gajdzica, use the term "reserve." It assumes that the reserves generate and identify problems, or are the results thereof. Parallel to the context of this approach are the concepts of understanding disability. People with disabilities can, like the able-bodied, take the areas with the approval of society, often as a result of their own activity and smart action, or be "exiled" to such areas (Gajdzica 2013:16-17). Zenon Gajdzica follows a concept developed by Goffman (2011), assuming that: 1) GOOD is the absence of territorial restrictions for people with disabilities manifested in their full participation in culture and other commonly available benefits, in the absence of restrictions in fulfilling valuable social roles, in full access to education, and in social respect; 2) DEMANDS constitute laws, customs, and norms, both formal and informal, defined by the able-bodied majority, a system of social empowerment and access to valuable roles, as well as control and use of other goods controlled by them; 3) CLIENT is a person with disabilities, who can also act as their own AGENT; 4) OBSTACLES are common barriers (architectural, social, cultural, educational, legal); 5) AUTHOR (counter-client) is the able-bodied society, particularly its part which does not recognize the needs and potential of people with disabilities; 6) AGENTS are specialists, social workers, professionals, representatives of people with disabilities, who are usually able-bodied representatives of society representing its interests (Gajdzica 2013:15). Personally, I believe that a closer and more accurate term to describe a given place and a certain way of "socio-cultural interaction" is the term colony, which is referred to as a land or area under the control of a given state, usually an overseas territory, dependent on that state, serving as an area of its political expansion and economic exploitation. A place of forced residence, isolated from society, for example, a colony of people suffering from leprosy. Colonialism—"the policy or practice of acquiring full or partial political control over another country, occupying it with settlers, and exploiting it economically" (Oxford Dictionary [<https://www.lexico.com/en/definition/colonialism>]; retrieved January 02, 2021)).

and cultural differences as key components of successful research practice and beliefs.² Peculiar attempts to allow a person with a disability to speak, which so far existed as subordinate through the implementation of, for example, concepts such as self-advocacy and independent living focus on a person with a disability in the background, their subjective choices, and independent life to the extent possible. Being your own advocate in charge of your own affairs and independent life are the slogans of the creators of these concepts. Therefore, the key research issues of power relations, initiation, benefits, representation, legitimacy, and responsibility continue to be addressed within the framework of goals, concerns, and interests of the researcher's culture (cf. Bishop 2009:167-207 [about Kaupapa Māori]). The ongoing neo-colonial dominance of the majority's interests of the able-bodied in research and social activities aimed towards people with disabilities continues. Despite appearances, the spaces of people with disabilities are not postcolonial in nature, but rather neo-colonial, as the contemporary strategies of enslavement/colonization have become more sophisticated, which I will try to present in the following paper. We must remember that the term "postcolonial" does not refer to people who are at the very bottom of this hierarchy, who still operate on the distant, economic outskirts of the nation-state—in other words, there is nothing "post" about their colonization (Loomba 2011:25). The precarious situation often stems from the conviction that the dependence on the able-bodied is the only "right" way to live (see: Wlazło 2014). This illusion of sorts has a significant impact on the attempts to demystify the selected social activities presented in the paper below.

² Concerning the culture of people with disabilities, a debate is ongoing as to whether it is appropriate to talk about the culture or the group (see: Barnes and Mercer 2008:120-124).

The main goal of the text is to show the difference between postcolonialism and neo-colonialism in the context of social research on people with disabilities. Asking the question of whether we are dealing with specific postcolonialism in relation to this social group, which implies decolonialism, that is, as we read in the Oxford English Dictionary—*withdrawal of colonial powers from their former colonies; gaining political or economic independence by the colonies* (as cited in Kennedy 2014:12). It should be remembered that the keywords in this definition are “withdraw” and “gain,” terms that evoke the association with a peaceful financial transaction carried out with mutual consent; the associations are strengthened by the synonym of decolonization suggested by the dictionary—transfer (handing over), the word referring to legal language, meaning the transfer of property from one person to another (Kennedy 2014:12). Are we dealing with neo-colonialism by exposing/pointing to the illusory nature of research and, above all, mock activities in areas such as economy, social policy, and education?

On Colonial Discourse

According to Peter Pels, three different ways of defining colonialism can be found in anthropology. It is interpreted as: 1. the next stage of development, the ongoing modernization process; 2. a political strategy or experience of exploitation and domination; 3. an open field of battle and negotiation (Pels 1997:164).

The various and disproportionate ways of understanding colonialism indicate that its meaning is not predetermined, nor is it a foregone conclusion. Referring to the definitions presented by Pels, the first of them can be considered as an exemplification of the interpretation made from the point of view

of the Enlightenment modernization discourse; the second is an expression of its criticism, embedded in Marxist theory; the third, in turn, brings to mind postcolonial reflection stimulated by post-politicalism (see: Songin-Mokrzan 2014:83).

Ben-Ari distinguishes at least three types of reflection focused on tracing the connections between the science of the Other and colonialism. The first is to consider anthropology in terms of a practical discipline focused on the production of knowledge that can be applied in a specific social environment. The second is focused on the search for connections between theory (mainly the evolutionist and functionalist models) and colonialism. The third deals with the role that our discipline has played in the production and in sustaining the “colonial discourse” (Ben-Ari 1999:383). It must be remembered, though, that colonial discourse itself is not a new, fashionable synonym for colonialism—it signals a new way of conceptualizing the interaction of cultural, intellectual, economic, and political processes in the formation, perpetuation, and dismantling of colonialism (Loomba 2011:70).

“De-Colonization of the Minds”

Bill Ashcroft’s introduction to *The Empire Writes Back* (1989:1)—a seminal work in postcolonial studies—reminds us that “more than three-quarters of the people living in the world today have had their lives shaped by the experience of colonialism.” The (post-)colonial condition, apart from species, race, class, caste, and gender identification, may be treated as one of the basic determinants of contemporary understanding of individual and group human subjectivity, with the ultimate goal of postcolonial research being—as the Kenyan writer, Ngũgĩwa Thiong’o (1986), puts it—**decolonizing the minds**.

This decolonization is linked to the criticism of Eurocentrism, common in the whole of postcolonial studies, albeit carried out in different manners and understood in a variety of ways, as well as to the (unrealistic) project of “provincialization of Europe” by means of promoting postcolonial kinds of knowledge (knowledge of resistance) using postcolonial literature, history, art, and science, contesting the Eurocentric way of knowing with its essentialism, metanarratives, universalism, the idea of progress and purpose, as well as thinking in binary opposites as an ideology legitimizing imperial dominance (Seth, Gandhi, and Dutton 1998:8-9).

When faced with quite strong criticism, the colonial authorities and their successors were interested in propagating a selective and censored version of events, showing decolonization as a rational process carried out at the will of the political elites, whose decisions confirmed the legitimacy of the governments they represented and the logic of the international system against which they demanded loyalty (see: Kennedy 2014).

Contextuality of Postcolonialism

Mina Davis Caulfield, in an article published in *Reinventing Anthropology*, suggests that the concept of subordinate exploitation should be presented in a much broader context, not only in relation to economic, but also social and cultural aspects of the relationship between the West and the non-West. The author thus draws attention to the fact that as a result of the influx of new market and cultural patterns, not only traditional social structures are changing, but also local norms and values, strategies of action, and ways of defining the cultural and ethnic identity of the subjects (see: Caulfield 1972:197).

The critical analysis of the effects of colonialism on both the colonizers and the colonized, carried out while constantly keeping in mind the superiority of Europe over cultures and territories colonized by its empires, needs to take a look at the issues of presenting and perpetuating stereotypical ideas of the “other” and the role these representations played in the formation of the postcolonial subject. As Samuel P. Huntington (2007:66) pointed out, people from outside the Western civilization remember very well that the West won the world not by the superiority of its ideas or values or religion, but rather by its superiority in applying organized violence.

These days, however, postcolonialism is also understood as an intellectual approach characterized by constant criticism of institutions that have the tools to exert coercion/pressure on people. This approach to postcolonialism was postulated by Michel Foucault (1987; 2006), as well as Noam Chomsky (2008; 2018), among many others. Postcolonialists (see: Gandhi 2008; Young 2012) stress that there is no room for thinking in terms of progress and the conviction that there are “better times” coming after years of oppression. We also need to keep in mind that postcolonial theory pays particular attention to the consequences of colonialism. The apparent persistence of the colonial system and the stigma of colonial past, which resonates in contemporary culture on the macro-scale in independent states and on the micro-scale in various minority groups, still is one of the key issues for their identity, as well as manifests itself in the form of new, **neo-colonial** forms of **subordination**, causing tension not only between the colonizer and the colonized, but also illuminating that: “there is a certain tension between those who consider postcolonialism to be a geo-historical phenomenon and those who see

it as a theory offering ideologically charged research directives stemming primarily from various forms of Marxism, post-structuralism, and deconstruction" (Domańska 2008:6 [trans. MJ]).

The postcolonial perspective becomes possible to apply in the analysis and description of the phenomena involved in the relations of power/domination and subordination, the superiority of the colonizer over the cultures and territories colonized by the empire. The common ground for many of the possible approaches and definitions of postcolonialism is its nature as a critical discourse in which an effort is made to read and understand individual and collective subjectivities intertwined with the experience of colonization, decolonization, exclusion, or hybridization, entangled in the relations of subordination and domination, located in the social space in marginal or central positions (see: Krzemińska 2019:325).

Postcolonialism should assume a specific deconstruction of the existing world by, for example, introducing alternative knowledge into power structures. As Robert Young (2012:19-20) observes, it aims to change people's thinking and behavior and to create fairer relationships between the peoples of the world. Postcolonialism disturbs the world order. It threatens privileges and power. Its radical program assumes the demand for equality and prosperity for all beings on earth.

However, there is a risk, and it is quite great, that the process of decolonization does not necessarily involve the rejection or denial of imperialism. Neither has it led to the complete exit of empires from the political scene. Most often, they have just reborn in a new shape (see: Kennedy 2014). And in this situation, we should speak of neo-colonialism.

Neo-Colonialism

As we read in Kennedy's *Decolonization* (2014:110), the most striking example of neo-colonialism is perhaps France's relationship with its former holdings in Western and Central Africa. This territory was called *Françafrique* and its relations with the metropolis were characterized by the slogan *partir pour mieux rester* (leave to stay). Their natural resources were still exploited under secret contracts with French companies, and French specialists had a disproportionate influence on the business and bureaucratic system of these countries. France retained control of military bases in the region and used the troops stationed there to intervene in the internal affairs of Western and Central African states. Since 1960, the French have carried out over twenty military actions in this territory, thanks to which governments cooperating with Paris retained power and less submissive ones were overthrown (Kennedy 2014:110). So we are dealing with the illusion of decolonization, where actually neo-colonialism as an idea came out earlier than postcolonialism and is connected with the direct consequences of the decolonization process. While postcolonialism may be understood as an epistemological guideline allowing researchers to better understand the social, political, and economic situation of countries, which emerged as a result of decolonization, neo-colonialism may be defined as both the political strategy of former empires towards their former territories, as well as the state of countries, which emerged as a result of decolonization (Crozier 1964:11).

One of the most important voices that showcased the essence of neo-colonialism was the President of Ghana, Kwame Nkrumah, one of the main ideologues of so-called African socialism, who held office from July 01, 1960 to February 24, 1966. Speaking

of neo-colonialism, he claimed that, "The essence of neo-colonialism is that the State which is subject to it is, in theory, independent and has all the outward trappings of international sovereignty. In reality, its economic system and thus its political policy is directed from outside" (as cited in Malendowski 2000:321 [trans. MJ]). It is thus apparent that any attempt at showing the difference between *post* and *neo*-colonialism is quite a difficult task, which will probably result in the reader getting lost in the terminology. I believe that for the sake of the discourse presented in this paper, we also need to cover the difference between imperialism and colonialism. The differences between these two approaches and systems are defined in a variety of ways, depending on their historical varieties. One useful way of distinguishing these systems' concerns refers to the spatial, instead of temporal, criteria.

[We can thus] think of imperialism or neo-imperialism as the phenomenon that originates in the metropolis, the process which leads to domination and control. Its result, or what happens in the colonies as a consequence of imperial domination, is colonialism or neo-colonialism. Thus the imperial country is the "metropole" from which power flows, and the colony or neo-colony is the place which it penetrates and controls. Imperialism can function without formal colonies (as in United States imperialism today [**as well as Russian imperialism and imperialism exhibited by some European countries**]), but colonialism cannot. [Loomba 2005:12 (sentence in bold added)]

These different understandings of colonialism and imperialism complicate the meanings of the term "postcolonial," a term that is the subject of an ongoing debate. It might seem that because the age of colonialism is over, and because the descendants of once-colonized peoples live everywhere, the whole world is postcolonial...To be-

gin with, the prefix "post" complicates matters because it implies an "aftermath" in two senses—temporal, as in coming after, and ideological, as in supplanting. It is the second implication which critics of the term have found contestable: if the inequities of colonial rule have not been erased, it is perhaps premature to proclaim the demise of colonialism. A country may be both **postcolonial (in the sense of being formally independent) and neo-colonial (in the sense of remaining economically and/or culturally dependent) at the same time.** [Loomba 2005:12 (emphasis added)]

Thanks to this the next question arises: Is the State really/realistically about helping people with disabilities? Or does help happen while realizing your own political ambitions and fighting for your own life stability? By using the violence, which I understand after Slavoj Žižek as a kind of objective violence called systemic violence, that is, a feature of all systems whose task is to maintain a level of normality in society. We do not see it because it organizes the reality (it is contained in social, economic, and political systems) (see: Žižek 2010:5-6; Misiarz-Filipek 2015:10), which consists of making the appearance that something is necessary when in fact it is voluntary. Each entity subjected to objective violence says: I have no choice as to what his social role demands of him, he persists in "bad faith." We can easily imagine the circumstances in which this confession will be true to the extent that there is no choice in this particular role (Berger 1988:135-137).

These are modern neo-colonialists (e.g., technocrats, eurocrats, professionals, etc.) who in order to avoid the social-cultural collapse of colonialism rebuild it in a rational way, making their subjects dependent on their own charity, which is omnipresent in almost every area of social life. According to Piotr Nowak (2014:4-5 [trans. MJ]),

It is difficult to defend oneself from the organized “charity” of neo-colonizers, disguising themselves as philanthropists. Neither officials nor politicians can protect us since they were the first to fall prey to them. Neither can we find help from our teachers or respected authorities—they also took from them. There is no good way out of this impasse—the impasse of philanthropy—which has affected the whole of Europe. However, one thing is certain—nothing is free. We paid for our wealth with our freedom, faith gave way to the need for miracles, the mystery was dispelled by the seemingly unlimited access to knowledge and information.

Although intellectuals declare their intention to allow the voices of once colonized peoples and their descendants to be heard, in fact, they close off both their voices, as well as a legitimate place from which those critics can speak (Jacoby 1995:30).

Summarizing this part, one may be tempted to say that the basic difference between postcolonialism and neo-colonialism is that neo-colonialism “tears off the mask” of decolonization, which, in fact, does not exist and cannot be said to have any (POST!) colonialism.

In such a situation, despite the visible changes in the socio-cultural space, people with disabilities seem to still be found. They occupy a social position the designation of which is being colonized by so-called able-bodied society, which, as a culture of “superiority”/dominant, because it grows on the foundation of “normality,” exercises power over the “subordinate” intellectually disabled (Krzemińska 2019:322).

People with disabilities, assuming their location in the socio-cultural space, seem to succumb to the domination and power of the able-bodied part of society, including intentionally established institutions and en-

tities operating within it, acting as professionals. This is because, by situating themselves in a privileged position, they fund/establish certain frameworks and boundaries in which a person with a disability can exist. At the same time, they launch a specific repertoire of actions and practices undertaken against it, which take the form of a decolonization process.

A person called intellectually disabled occupies an unusual place in society. It is commonly known that this is an unfavorable place, because a person classified in this way is not only not treated as a valuable person in society, but is most often even excluded from the mainstream of the modern world (Żółkowska 2013:40).

Neo-Colonial Educational Practices—We Are as Disabled as We Agree to Be

Undoubtedly, the end of the 20th century and the beginning of the 21st century brought a completely different approach to this issue, including the birth of interdisciplinary Disability Studies, breaking the one-sided approach to this phenomenon (Barnes, Oliver, and Barton 2002). Colin Barnes points out that the scientific sources of the ontology of disability studies arose on the wave of criticism of the social model of disability because “it is argued that the conceptual distinction between impairment and disability upon which the social model rests is false” (Barnes 2003; Podgórska-Jachnik 2016:13-36). In the area of special education in Poland, the dominant way of practicing this discipline still remains, rooted in the scientific way of thinking, a structuring approach in the light of which disability is a phenomenon determined by specific features available to us in the objectifying act of cognition, implemented in the context of dividing reality into the sphere of what is normal and what is pathological (see: Canguilhem 2000; Kosek-Nita and Raś 2000).

These processes in contemporary discourses gain a more general social and cultural perspective due to the fact that they are characterized as affecting not only disabled people, but also other minority social groups, which, due to specific social mechanisms, are discriminated against, marginalized, and excluded from the mainstream of social life, and the universal game for status and power. The changes and transformations that have taken place in contemporary humanities and in the understanding of certain fundamental notions that shape it (including the categories of identity and the issue of social practices that construct the subjectivity of individuals) have resulted in a re-orientation of the area of research interests and ways of exploring the social world and the world of culture. Where the most important seems to be the search for social and cultural mechanisms of constructing these meanings, shaping practices applied to people recognized as disabled, and thus launching attempts to understand what the phenomenon of disability is and how it is perceived in different communities, groups, cultures, in other words—what meanings shape the individual and social identity based around damages and dysfunctions of "body and mind" and what social consequences may be (Rzeźnicka-Krupa 2009:12).

Contemporary trends in the approach to the issue of disability describe the assumptions of interdisciplinary studies on disability and the inclusive movement in contemporary society. A special distinguishing feature of the new approach is the recognition and development of the concept of subjectivity and autonomy of people with disabilities, but also the identification of new determinants of inequality and exclusion. The multiple of this exclusion, caused by the coexistence of several factors, is the basis for the theory of the interaction of oppressive factors in social systems built on domination and submission. Dorota Krzemińska (2012:55) writes about forcing people with disabilities

into the strategies of "dependent and unhelpful cripples" when stating that a colonized intellectually disabled is most often seen as an incapable, dependent, requiring constant control—as such, a wide practical and operational sphere needs to be launched for them, which in its repertoire of various offers designed for an intellectually disabled adult will create conditions for their continuous improvement—to improve becoming a constant task imposed throughout life. And it is none other than a paternalistic parent, an overprotective professional—they prepare a whole range of assistance offers, making them addicted to themselves, or otherwise colonizing a disabled person.

The mentee is doomed to a repertoire of undertakings and activities planned by an able-bodied therapist "who in his zealous pursuit of the rehabilitation mission designs activities that do not necessarily correspond to the actual needs of the disabled person" (Krzemińska 2012:56 [trans. MJJ]). Are we dealing with a case where concepts such as "ethnic" (disability, etc.) postcolonial have become a metonym for something fashionable and marginalized at the same time? Do we not notice this regularity consisting in the fact that the name of the study on disability may become a carrier and attractive model for conducting social and cultural research in Poland for special educators and sociologists? Unfortunately, it exists only in the declarative layer of scientists, in view of a completely different reality and research paradigms in which given academics exist.

For if academics declaring that they conduct studies on disability ignore social and cultural constructs and models of disability, and in fact conduct research in a clinical model focused on therapy and repair, one can be sure that they do not pursue studies on disability, despite previous declarations (Borowska-Beszta 2016:38).

Neo-Colonial System Violence

The essence of neo-colonialism in education is based on excluding a part of the group, for example, due to health or disability, from the rights available to the general public, while building the conviction among teachers, educators, and parents that it has to be done and that it is what is best for them. While a developmental matrix is still applied to the lives of people with disabilities, as proposed by great theorists of developmental psychology, I consider such a way of using the developmental approach to research into adulthood of people with disabilities to be a waste of an opportunity to create a new paradigm in the study of issues concerning disability, as well as a theoretical approach, which may not contribute to progress in providing effective assistance in the development of people (Kowalik 2012:39). In addition, pathology serves as a way to adjust, as a reaction to factors harmful to the system and a way of dealing with them in such a way as to keep the system alive (Kościelska 1995:197). Unfortunately, as it turns out, it does not bother anyone that the right of their children and students has been restricted, and what is most puzzling is that it has been restricted—in my opinion—in breach of the applicable law in Poland. As Bogusław Śliwerski (2011:10) pointed out, “We are dealing with a situation where self-government stands against self-government, or pseudo-self-government, or self-government only appearing to be self-government, in a way that divided self-government into individual entities,” or into groups of able-bodied students, students with mild intellectual disabilities, excluding, among others, students with moderate and severe intellectual disabilities from the process of creating student government in schools. To quote Article 85, item 8 of the Education Law of 2016, which states that, “The Minister in charge of education shall specify, by means of a regulation, the types

of schools and institutions in which no student government is established due to the necessity of using a special organization of educational activities and working methods in the school or institution, as well as due to reasons concerning the upbringing, care, and resocialization.”³ Such a list of types of schools and institutions was laid out in the regulation of February 23, 2007 by the then Minister of National Education, Roman Giertych. The list includes special schools for children and young people with moderate and severe mental disabilities, special education centers for children and young people with moderate and severe mental disabilities, centers for children and young people with profound mental disabilities, as well as children and young people with multiple intellectual disabilities, enabling them to fulfill their obligation to receive one year of preschool education, compulsory schooling and compulsory education, correctional facilities and youth shelters, and schools in penal institutions.

What is interesting is that when I asked the Ministry of National Education about what kind of research, consultations, and other sources allowed the decision whether these schools and these groups of students are not able to create a student government, to date, I have only received information confirming the functioning and treatment of people with disabilities by the authorities (in this case, the Ministry of National Education) according to the medical paradigm and objectifying them. In response to my question, I received what follows:

In my professional opinion, any initiative to reinforce the methodological and scientific basis for the identification and correct application of subjective regulations

³ See: <https://isap.sejm.gov.pl/isap.nsf/DocDetails.xsp?id=W-DU20170000059> [trans. MJ]. Retrieved January 02, 2021.

(regarding student governments in this case) is positive, which is why I encourage you to continue your work. In particular and in the context of the quoted articles of the Constitution, it is worth noting that the principle of equality is not absolute. In this context, we may consider the reasons and premises which could have been the basis for the legislation obliging the Minister to exclude some institutions from the regulation (perhaps there are no students in some of them, **perhaps in some cases it is due to medical considerations**, etc.). [official e-mail correspondence with the Ministry of National Education, 2015-03-05 (trans. MJ, emphasis added)]

It is this above statement that is very important and shows the specific colonial aspirations of power, which is entangled in dependence on tendencies and influences: the past—“traditionalism” and the present—“postmodernity,” “medicalization” and “humanization,” objectification and recovery of subjectivity. As we can see, the past of thinking in the context of people with disabilities still has a normative dimension confirmed by people of science. As we see, some researchers of student government hold a similar belief. Mariusz Grążawski (2011:32 [trans. MJ]) states that the “list of exemptions is therefore significant, but seems justified.”

In the above situation, I contacted the Ministry of National Education and Mariusz Grążawski and asked them to present research, public consultations, et cetera, which would in any way confirm their belief in the justified nature of excluding a particular group of students from the possibility of creating student governments. To this day, I have received no response from Grążawski. The Ministry of National Education, after my repeated reminders, replied that

The Ministry of National Education conducted a new query in the archives of the Ministry of National Ed-

ucation and at the level of individual departments of the Ministry of National Education. On the basis of the information obtained, it appears that the documents describing the process of creating the final wording of the above-mentioned regulation have not been preserved. We should consider that the above situation was caused by the following circumstances:

- the obligation to archive the final document, including the definitive text of the regulation with the signatures of the leading department and other cooperating departments (the document was provided) and, accordingly, the lack of justification for archiving preliminary versions, working documents, and drafts;
- the obligation to include an impact assessment in the justification to the regulation, which must describe the results of public consultations;
- nearly a decade since the content of the regulation was drafted, along with the fundamental organizational and staffing changes that occurred during that period at the Ministry of National Education. [official letter no. DKO-WEK.431.22.2016.AK, 2016-10-16 (trans. MJ)]

It is puzzling that no documents from public consultations concerning an issue as important as student government have been preserved in the archives of the Ministry of National Education. All while we know perfectly well that the idea of

civil society is implemented mainly in a process of creative cooperation and negotiation—in a process involving subjects free from cultural, religious, and philosophical prejudices. There are no managers or subordinates in self-government. There are only those who have committed themselves to do something for the common good and there are all those who control and evaluate it. Both parties need to benefit from it. Self-government that does not benefit everyone is no self-government. [Radziewicz 1985:12 (trans. MJ)]

Another aspect, which I consider to be even more puzzling, is the fact that the said regulation of February 23, 2007, on the types of schools and establishments which do not have a student government, namely, item 2 of the said regulation—Public Consultation on Regulatory Impact Assessment, reads: “In the course of the public consultations, the Polish Teachers’ Union (PTU) made a comment. The comment was taken into account” (Regulation of the Minister of National Education of February 23, 2007, Regulatory Impact Assessment [trans. MJ]).

Therefore, I contacted the PTU via e-mail, asking for an opportunity to access the documents concerning the public consultations carried out. It turned out, which was particularly surprising, that the PTU claims that in the given year, namely, 2007, it did not participate in any public consultations for the Ministry of National Education.

As one may see, in this particular case, we have normative acts, which result in far-reaching consequences for a large group of students. However, neither the Ministry of National Education nor the PTU is able to present documents from the public consultations. I have a feeling that someone has tried, and, unfortunately, is still trying to, as philosopher Harry Gordon Frankfurt would say, bullshit us. “The bullshitter may not deceive us, or even intend to do so, either about the facts or about what he takes the facts to be. What he does necessarily attempt to deceive us about is his enterprise. His only indispensably distinctive characteristic is that in a certain way he misrepresents what he is up to” (Frankfurt 2005).

The Ministry tried to prove that for the sake of the welfare of these students, they would not get to form their student government, while, in my opinion, depriving young people of the possibility to learn

about governing themselves is a kind of an assault on their freedom. According to Aleksander Kamiński (1965:9 [trans. MJ]), self-government

is a variation of the principle postulating to lead the student to independent and conscious management of their own conduct and behavior, in other words, to self-discipline as a form higher than the principle of external punishment, leading to an upbringing in an attitude of obedience and submission. Upbringing focused on self-discipline postulates placing the student in an independent position, in situations requiring them to make choices.

Instead of a Conclusion

At this point, I believe, it is worth our while to recall the ethical views of Tadeusz Kotarbiński (1976:36-37, 63-67). On the one hand, he strongly highlighted the ideal of a friendly guardian, a person sensitive to one’s needs, particularly those of people under their care, offering their reliable support. On the other hand, as a proponent of practical realism, he interpreted care primarily as a defense against evil, in accordance with the medical principle of *primum non nocere*. In the case of protection from harm and suffering, I prevent negative states, but my merits seem negligible because they boil down to preventing evil from happening in the real world. When morality is understood as a duty to promote goodness, when I help, I bring about a certain good, we realize positive values—the source of merit. Therefore, when analyzing the duty to help, one should first determine whether it is more important to stop the expansion of evil than to promote good.

Should we, as caretakers, educators, parents, (SOCIETY), constantly protect children from the undisclosed “evil” of undefined colonialists, as well as constantly

criticize the system? Or should we teach self-reliance and trust the subordinate subjects that they can create the good by becoming responsible for themselves, and show them that self-inflicted dependence and self-exclusion are tantamount to constantly running away from freedom? However, the choice is up to each of us.

An important question is whether contemporary education is post or rather neo-colonial. It is difficult to give a clear answer to this question. However, the above example (although briefly described) shows that the educational system is more neo-colonial rather than postcolonial. The consequence of such actions is exactly this neo-colonialism, which is based on the fact that the colonized people colonize themselves. The one who colonizes (the Ministry of National Education) offers people goods that are received with gratitude and willingness. To this end, the first art, which people need to train, is the art of giving. We need to learn to give in order to get as much as we can. The "final solution" of the "an-

thropological question" is, therefore, brought about by giving, not extermination. It turns out that this is, in fact, the case, and as the additional value of the outlined discourse is the fact that we begin to understand the need to reflect on the condition of living with disabilities, being excluded, or subordinate in the context of neo-colonial pedagogy.

The peculiar entanglement in the appearance of pseudo-help and the attempt to show the mystification of the "traditional" pattern of discipline allows us to take a closer look at the social situation and locations occupied in the (public) space by people without disabilities and those with intellectual disabilities. "This prompts us to review the relations of subordination and dependence prevailing here, to reflect on the specificity of their (non-) symmetry, the placement of certain entities on the central or (with) marginalized/peripheral positions, with a critical look at the succession of the existing knowledge and related practices and legacies" (Krzemińska 2019:325 [trans. MJ]).

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Archaeological, Alethurgical, and Dispositif Analysis: Discourse Studies on Higher Education in Poland from a Post-Foucauldian Perspective

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Abstract: At the present stage of the reception of Foucault's ideas, various theoretical and methodological trends coexist, within which the concepts of Michel Foucault are used fruitfully in empirical research. One of them is discourse studies understood as an inter- and transdisciplinary research area. This article distinguishes and describes three post-Foucauldian strategies of discourse analysis, the combined use of which in one research project is a proposal to integrate concepts scattered in Foucault's various works. The strategies distinguished (archaeological, alethurgical, and dispositif) are characterized by the different analytical categories, understanding of discourse, and its relations with knowledge and power. The article presents selected results of the complementary use of concepts such as knowledge formation, alethurgy, confession, or the dispositif in the empirical research on the reform of higher education in Poland.

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One of the most inspiring and, as it has turned out over time, also one of the most frequently quoted statements by Michel Foucault (1972:21) is the question he formulated in *The Archaeology of Knowledge*: “How is it that one particular statement appeared rather than another?” This general question posed by Foucault and its various detailed variations formulated in subsequent lectures and publications have been provoking, for decades, the development of discourse studies, known as (post-)Foucauldian analysis. At the present stage of its development, the theoretical assumptions, and methods of research procedure in relation to specific research problems are already quite well described (e.g., Åkerstrøm Andersen 2003; Diaz-Bone 2005; Diaz-Bone et al. 2007; Angermüller and van Dyk 2010; Keller 2011; Nowicka-Franczak 2017; Ostrowicka 2017; 2019). It is also worth noting that discourse researchers, benefiting from Foucault’s wealth of achievements, use a diverse range of analytical concepts and categories. However, the research is based on a discussion about the possibilities and limitations of concretizing Foucault’s concepts in empirical research on current social contexts and phenomena, distant from Foucault’s direct interests. The three voices distinguished by Magdalena Nowicka-Franczak (2017) can be located on a continuum from praxeological positions, through distanced voices, to skeptical ones. The supporters of the praxeological positions see in Foucault’s work a “toolbox” and a kind of matrix with concepts and categories operationalized in relation to specific empirical problems. The voices from the skeptical positions express the conviction that Foucault’s method cannot be repeated and applied to the study of other empirical materials, and any attempts to combine them with qualitative research

methods evoke a clear resistance. In the middle of the line of this dispute there are positions that distance themselves from considering Foucault’s proposal as a method in the strict sense of the term, but perceive its role as a meta-method, a specific critical attitude that distinguishes the post-Foucauldian perspective from other trends in discourse analysis (cf. also Klemm and Glasze 2005; Diaz-Bone et al. 2007). This article is an expression of the adoption of the first position, and thus recognition of not only the heuristic and meta-theoretical potential, but also the methodological usefulness of Foucault’s works for contemporary empirical analyses of knowledge, power, discourse, and subjectivity. For I am close to the cognitive perspective in which concepts play the role of a method, and thus are a proposal on how to go further from a given point (cf. Tanesini 1994). It is a methodological position that assumes that theory constructs empirical cognition and that the concepts used are a specific form of thinking and, as such, can be defined and redefined in a specific way for selected purposes.

Accordingly, the purpose of this text is twofold. Firstly, on the basis of my own research experience, I want to identify and show the specificity of three analytical strategies in post-Foucauldian discourse research. I am going to show the analytical and heuristic potential of archaeologically-, alethurgically-, and dispositif-oriented analysis. Secondly, I am going to present selected results of a research project into the reform of higher education in which these strategies have been applied. I mean here the results of the research project I led in the years 2015-2019, entitled “The governmentality of university—a discursive image of the contemporary reform of higher education in Poland.” This project is an example of research where different strategies are intertwined and complementary. Distinguishing them in this text

results from the need for a methodological reflection on some of the tropes of the post-Foucauldian discourse analysis,¹ the differentiated realizations of which are related to the ambiguity of Foucault's (see: 1972; 1981) concept of discourse. Although the analytical value of some terms is certainly derived from the precision of their meaning, in the case of a concept such as discourse, we owe its multi-context usefulness to the ability to stimulate ambiguity (cf. Bernard and Spencer 2010). In line with the terminology adopted by discourse scholars, the "post" perspective is referred to here because it is based on concepts and categories derived from Foucault's lectures and other works, but adapted and modified for new empirical purposes. Although in his research Foucault used materials in the form of various texts, documents, diaries, or notes, he did not conduct "discourse analyses" in the sense that is common today, that is, as a specific methodology of empirical research.

Context and Aims of the Research Project

The project, the selected results of which will serve as an exemplification of the research conducted into post-Foucauldian discourse analysis strategies, is the result of interest in the discursive mechanisms governing the transformation of the system of science² and higher education in Poland. The years covered by the analysis (2011-2014) are the time of implementing a new and, in many assumptions, radical reform of this sector. By the Act

of 2011, Barbara Kudrycka, the Minister for Science and Higher Education, ended the period of "policy of no-policy" (Kwiek 2009), that is, the years of the spontaneous drifting of higher education without much state control. In the first dozen or so years after the system transformation in 1989, Polish higher education experienced an "educational boom" and hardly limited development of non-state universities, and, as a result, problems arose related to insufficient supervision over the quality of education (Antonowicz 2015). On the other hand, in the recent decade, the core of the controversy has been the solving of the problem of the decline in the number of applicants for studies (Antonowicz and Gorlewski 2011). The reform introduced in 2011 (and its subsequent amendments), was a manifestation of the state authorities' interest in the deeper regulation and control of the system. Its preparation, and then introduction, launched a wide public debate in which, on a different scale, almost all the actors in the field of higher education were involved, that is, academic teachers, students, the ministry, entrepreneurs, and employers. And it is this debate and the discursive mechanisms of power that have led to the contemporary transformation of the university that has become the subject of our research interests.

One should begin with a reminder that discourse studies, understood as empirical research in social sciences, are based, on the one hand, on certain theoretical concepts of discourse and, on the other hand, on methodological assumptions about its analysis. Referring to the Foucauldian tradition, we understood the concept of discourse broadly as "a group of statements in so far as they belong to the same discursive formation; it does not form a rhetorical or formal unity, endlessly repeatable, whose appearance or use in history might be indi-

¹ And as a proposal based on my own research, this text does not cover all possible and existing tropes of post-Foucauldian analysis. Such a task would exceed the size of a standard academic article.

² "Science" here refers to the research function in all fields of study, not only in what is understood in the English language as sciences, but also in the humanities.

cated (and, if necessary, explained); it is made up of a limited number of statements for which a group of conditions of existence can be defined" (Foucault 1972:91). Each statement introduces an entire set of rules that have formed its object, modality, the concepts used by it, and the strategy to which it belongs. In this sense: "Discourses are, therefore, about what can be said, and thought, but also about who can speak, when, where, and with what authority. Discourses embody meaning and social relations, they constitute both subjectivity and power relations" (Ball 1990:17). As Rainer Diaz-Bone, Andrea D. Bührmann, Encarnación Rodríguez Gutiérrez, Werner Schneider, Gavin Kendall, and Francisco Tirado (2007) emphasize, Foucault looked at the conditions for the emergence of discourse and the changes that took place under its influence, presenting discourse as an order which is self-sufficient and unavailable at the level of intentions of the individuals involved in it. The Foucauldian notion of discourse thus raises the question of the limits and the way in which a certain type of regime operates, which shape the modality of a statement that aspires to be true, or has the status of fiction, or is a performative act that constitutes an event in the non-discursive space (Bytniewski 2017).

Referring to Foucault's wealth of achievements, we found many analytical categories that inspired us to look at the various aspects of statements mobilized in the context of reforming the contemporary university and modeling relations on the discourse-knowledge-power-subject axis. The research perspective was based on the assumption that in Foucault's entire writing, and not only in the phases called *archaeological* or *genealogical*, one can find categories for the analysis of the principles and procedures of discourse control, selection, organization, and distribution.

The theoretical perspective adopted in our research and the scope of empirical materials made it possible to achieve two related goals. They were:

1. the reconstruction of the knowledge that the discourse on the reform produces, and that which makes it possible, and
2. the identification of legal, disciplinary, and security techniques and strategies, thanks to which the authority operates and achieves its goals.

The corpus of the analyzed materials included texts published in the years 2011-2014, thematically related to the area of science and higher education:

- scientific³ and popular science texts published in journals devoted to higher education and science,
- press texts: the seven most opinion-forming nationwide dailies and weeklies (based on reports of the Institute of Media Monitoring, the following titles were selected: *Dziennik Gazeta Prawna*, *Gazeta Wyborcza*, *Rzeczpospolita*, *Newsweek*, *Polityka*, *W Sieci*, *Wprost*).
- monographs and post-conference proceedings.⁴

In total, the collection of empirical materials included: 884 press texts, 39 scientific articles (published in the journals *Nauka*, *Nauka i Szkolnictwo Wyższe*, and

³ The starting point in the process of selecting journals was the list of ranked journals announced in 2015 by the Minister for Science and Higher Education in Poland (see: www.bip.nauka.gov.pl/, retrieved January 18, 2021).

⁴ The body of the analyzed monographs was built on the basis of the results of a search in the database of the Polish National Library according to the subject heading "higher education."

Pedagogika Szkoty Wyższej), 17 scientific books, and 319 popular science articles (from the journal *Forum Akademickie*⁵).

The applied post-Foucauldian perspective did not lead to a detailed analysis of language, but aimed at recognizing the principles, techniques, and strategies which are the form and emanation of power relations mediated in discourse. We assumed that what can be said at a given historical moment in the institutional contexts of science, government, and media regulates academic life, and normalizes and naturalizes the system of higher education and science and its change in Poland in the second decade of the 21st century.

In the following parts, I am going to sketch the post-Foucauldian analytical strategies that have been used in the project and its selected results. In distinguishing analytical strategies, I assume that at the methodological level it is possible to define the categories of analysis in which they become “pulsating tools” and can be transferred to the study of various socio-political contexts, also those distant from Foucault’s immediate interests and experiences. The plane that determines their adequacy in a specific research project is always the ontological and epistemological assumptions about the subject of research and theoretical foundations of the research problem. In the case of our research, the theoretical framework was primarily the concept of governmentality, which in the social sciences has received an extremely favorable and multifaceted reception (cf. McKee 2009; Dean 2010; Bröckling, Krasmann, and Lemke 2011; McIlvenny, Zhukova Klausen, and Bang Lindegaard 2016;

cf. also Marek Czyżewski’s text in this volume). As a perspective sensitive to subtle knowledge-power relations, the concept of governmentality has also been recognized in higher education research. On this basis, it is interpreted in two ways, that is, as a specific form of neoliberal power, based on the responsibility of individuals, security strategies, and other liberal technologies of governing the population (e.g., Simons 2006; Liesner 2007; Cannizzo 2015; Sethy 2018), and as the multiplicity and integration of different power modalities, for example, neoliberal discipline and power (Thiel 2019), or the so-called “hybrid governmentality” combining liberal democracy with socio-cultural hierarchical order (Sen 2019).

In our research, the concept of governmentality encompassed various modalities of power (independent, disciplinary, pastoral, or neoliberal), the integral elements of which (i.e., rationalities, technologies, procedures) undergo changes, semantic reconfiguration, and “recoding” in new socio-cultural and political conditions (cf. Ostrowicka 2020). In this sense, the theoretical notion of governmentality emphasizing the relationship of rationality and knowledge production processes with power has become a framework linking Foucault’s ideas of discursive formations (knowledge formations), veridic (alethurgical) practices, and of the dispositif.

Archaeological Discourse Analysis

I call the first analytical strategy which is distinguished here *archaeological*, as it derives the basic analytical categories from the work *The Archaeology of Knowledge*, considered to be an interpretation of Foucault’s archaeological method. The key assumptions for this perspective concern the concept of

⁵ *Forum Akademickie (Academic Forum)* is a nationwide, widely available, monthly journal of an informative and journalistic nature, presenting key issues in the academic milieu.

knowledge and the rules of its formation. Foucault used the concept of knowledge in two senses, narrow and wide—in the narrow sense, when he spoke of *connaissance*, that is, knowledge formalized in the form of scientific, philosophical, and religious theories and systems; in the broad sense, when he studied *savoir*, that is, knowledge comprising both institutionalized forms and the socio-cultural conditions of its emergence and development. It is worth recalling here that from Foucault's (1972:182-183) perspective:

This group of elements, formed in a regular manner by a discursive practice, and which are indispensable to the constitution of a science, although they are not necessarily destined to give rise to one, can be called knowledge [*savoir*]. Knowledge is that which one can speak of in a discursive practice, and which is specified by that fact: the domain constituted by the different objects that will or will not acquire a scientific status...; knowledge is also a space in which a subject may take up a position and speak of the objects with which he deals in his discourse...; knowledge is also the field of coordination and subordination of statements in which concepts appear, and are defined, applied and transformed...; lastly, knowledge is defined by the possibilities of use and appropriation offered by discourse...; there is no knowledge without a particular discursive practice; and any discursive practice may be defined by the knowledge that it forms.

Foucault wrote about discourse as formations of knowledge, for example, in the context of clinical or psychiatric discourse. He called biology, mathematics, and economics "discourses." Therefore, archaeologically-oriented discourse analysis attaches special importance to the notion of knowledge and the rules for its formation in discursive

practices. Statements construed not as speech acts, grammatical, or logical sentences, but as discursive events, are created as part of discursive practices. Statements are of interest because of the role they play in establishing a network of relations in a given discursive field (see: Bacchi and Bonham 2014). However, *The Archaeology of Knowledge* is not a textbook for discourse analysts, but rather a collection of notions and heuristic concepts, and a source of ideas. Some researchers, such as Antti Saari (2017), find inspiration there, more in Foucault's "reflective" style than in his "method." Foucault's concepts are linked by researchers into discourse with other theoretical traditions developed in the field of social sciences and linguistics. For example, in post-Foucauldian research focused on the concept of knowledge, additional theoretical impulses flow from sociological theories. One of the best known, especially in the German-speaking circle, is Reiner Keller's (2011) theoretical-methodological proposal of the Sociology of Knowledge Approach to Discourse, inspired by the approach to knowledge by Peter Berger and Thomas Luckmann (1966).

In general, discourse researchers referring to the archaeology of knowledge are interested in formation rules at four levels: object formation, subject position, concepts, and strategies (Åkerstrøm Andersen 2003). As Niels Åkerstrøm Andersen (2003:32) notes, "archaeology illuminates the emergence and regimental character of the discourse." In our research, we focused on the regularities of the formation of the object of discourse, that is, on the answers to questions about the surfaces of the emergence of discourse, the instances that delimit it, and the patterns that lead to the classification and specification of statements about the transformation of various aspects of higher education in Poland.

The *surfaces of the emergence of the object of discourse* are places and social relations within which certain practices become the object of knowledge and the object of interest of science. The *instances of delimitation*, in turn, refer to authorities that have the power to distinguish, designate, and describe individuals. Questions are asked here about who (or what) defines certain phenomena as problems (e.g., social, educational, political), and who profiles and distributes knowledge. The instances are responsible for expressing the specific content and forms of knowledge, and determining its scope and distribution process. Another rule describes the constitution of the objects of discourse by placing them in the *grids of specification* according to which the objects are separated from each other, combined, grouped, and classified according to their selected properties (see: Foucault 1972; Ostrowicka 2019).

Table 1. Analytical categories—archaeological discourse analysis

ANALYTICAL CATEGORIES	
The surface of the emergence of the object of discourse	The space in which certain practices become the object of knowledge and the object of interest of science
The grid of specification	A rule that serves as a criterion for differentiating and categorizing statements
The instance of delimitation	An authority the function of which is to distinguish, mark, and differentiate phenomena, events, and objects

Source: Self-elaboration.

In our research into discourse, which crystallized during the implementation of Barbara Kudrycka's

reform, we were interested in the formations of knowledge in the field of:

1. reforming higher education and science in Poland,
2. academic teacher-student relations,
3. evaluation of the scientific activity.

The concept of formations of knowledge assumes the epistemological importance of discourse, according to which knowledge is a space of coexistence and dependence of statements (Ostrowicka 2019). According to Foucault's definition, each statement relates to other statements creating a network of related statements: "there is no statement in general, no free, neutral, independent statement; but a statement always belongs to a series or a whole, always plays a role among other statements, deriving support from them and distinguishing itself from them: it is always part of a network of statements, in which it has a role, however minimal it may be, to play" (Foucault 1972:77). A statement triggers another and, at the same time, places itself within the relationships between them in the space of knowledge, which also includes ways of talking about the goals of governing, justifying them, creating problems, and their model solutions.

The performed analyses of academic discourse revealed that the basic surface on which the issue of reform came to the fore was the phenomenon of relativization of the university and of the direction of its transformation, covering three overlapping areas of knowledge:

- the model of the university (*universitas studiorum*—a manufacturing university and a 3rd generation university),

- higher education management (state “management center”—a local-global network of relations),
- academic culture (a culture of trust—a culture of the audit).

The academic discourse was focused on the analysis and assessment of the consequences of new legal regulations and in particular, it concerned the ideological resources of the changes and their basic actors, the mistakes made during the reform, the areas in which reform is necessary, as well as the gains and losses from the changes. The diagnosis of the *status quo* performed two basic functions here. On the one hand, it provided justification for the reform of the university and, on the other hand, it encouraged critical reflection on the direction of the introduced reforms. The point of contact of the discourse participants was the sense of the debate, which turned the possibility of negotiating positions into a correction mechanism and space of “keeping an eye on each other.” The principle of a public debate turned out to be an instance of delimiting an object of discourse, a mechanism for legitimizing various points of view and “truths” about the reform of science and higher education. Knowledge about the reform was clearly varied. It was a space for the coordination of statements and the emergence, application, and transformation of concepts of:

- the reform as time (the past, present, and future of the university),
- the reform as space (the meeting of what is global with what is local),
- the reform as a driving force in scientific discourse,
- the reform as hope for improving the condition of science and higher education,

- the reform as a lost opportunity to improve the condition of science and higher education (see: Spychalska-Stasiak and Ostrowicka 2020).

Statements about academic relations and their contemporary changes were closely related to the concepts of the reform constructed as part of the discourse. The reconstruction of the formations of knowledge about academic teachers and students led us to the following conclusions.

Firstly, the characteristics of the research and teaching staff were located at the meeting of traditional and manufacturing university models, while statements about students emerged in the context of a reformed university, put to the test of the bureaucratic audit machine, the Bologna process directives, and the needs of the labor market. The evaluation of academic relations was conducted from both a descriptive and a normative perspective.

Secondly, the glorified figure of a *true professor* was confronted with the figure of a *professor*—a *meek laborer* or a *hopeless teacher and scientist* deprived of willingness to work. The relations constructed as part of the discourse emphasized the dissonance between professors and students, who were responsive to the expectations of modern times, emphasizing three discursive figures: a *statistical student*, a *student-client*, and a *student-rebellious citizen* (Spychalska-Stasiak 2019).

It is worth noting that the analyzed discourse was not always polarized. A clearly pejorative picture of the contemporary condition of academia was outlined in the discussion on changes in the evaluation of the scientific activity of an institution of science. The dispute over parameterization emerged on the

surface of the five main threads of the discourse. They were:

1. the reform of science and higher education in Poland,
2. the environmental and media visions of science in Poland,
3. scientific journals and their citations,
4. the theoretical and methodological foundations of scientometric analyses and the results of the research carried out on their basis,
5. the practice of parametric evaluation of scientific units.

The more or less scattered or consolidated statements shared subordination to the two schemas that differentiated the object of discourse. They were: the objectives of the statement (reporting and evaluative, or persuasive) and the type of criticism undertaken. The critical tone of the analyzed statements manifested itself in two ways.

Firstly, as a certain ideal of scientific knowledge (see: Filipowicz 2012), an expression of its autonomy in the pursuit of truth, related to the necessity of constantly doubting, being inquisitive, and self-reflective. As part of this type of criticism, the concept came to the fore of parameterization as a standardized procedure for methodologically grounded and objective research, aimed, despite the errors, problems, and pitfalls listed, to generate an ordered map of science in Poland.

Secondly, we were dealing with criticism that expressed the exercise of the right to speak out on important matters, assigned to scientists. This type of critique has formed the knowledge of parameterization as a space for contention about the following issues:

- parametric evaluation accuracy and criteria,
- national uniqueness versus the globality of science, and
- the identity of the humanities versus the universalism of science.

The broadly understood academic experience, one both derived from direct involvement in conducting the evaluations and from the research experience, turned out to be an instance of legitimizing statements about parameterization. The ultimate prerogative to formulate statements was the authority derived from the positions and academic titles held, and the status of an expert confirmed by numerous awards and the recognition of the academic community (Ostrowicka and Spychalska-Stasiak 2020).

To conclude this part of the article, it is worth repeating that the post-Foucauldian perspective adopted in our research emphasized not so much the question of what is knowledge about the reform of education and science, but the problem of how this knowledge is constructed (formed). The archaeological strategy is based on challenging the idea of an autonomous and central subject of discourse. The matrix for the analysis of the formation of knowledge about higher education in Poland in the context of its reform in the years 2011-2014 consisted of three categories: the surface of the emergence of the object of discourse, the grid of specification, and the instance of delimitation of discourse. An important assumption regarding the concept of discourse has become its epistemological significance. Thus, the archaeological analysis led to an answer to the question about the formations of knowledge that make possible, consolidate, and form the reality of reformed academia. The categories of discourse analysis derived from *The Archaeology of Knowledge* sensitized us to the emergence

of statements about higher education at a specific historical moment and in an institutional context (of science, government, and/or the media). During the implementation of Barbara Kudrycka's reform, we had to deal with an explosion of the discourse on the "problems" of science and academic education, unprecedented in the public space in Poland. The preparation and implementation of the Act of 2011 and the accompanying Regulations of the Minister, which introduced changes to the system, stimulated local centers of discursivization, that is, knowledge-power centers. While looking at knowledge from the archaeological perspective, we have reconstructed the rules of formation of the object of discourse, the alethurgical strategy has directed the analyses towards a certain kind of regime to which the subject of academia, placed "in the view" of the authority, is subordinated.

Alethurgical Discourse Analysis

The strategy of alethurgical analysis is oriented towards the tracking down of the so-called rituals of the manifestations of truth. They are discursive, ritualized, and regulated mechanisms that develop into relationships of power. The basic categories of analysis come from Foucault's lectures at the Collège de France, published under the title *On the Government of the Living* (2014). These are the categories of the alethurgy of the oracle and the alethurgy of testimony. The issue of the relationship between the subject and the truth was also developed by Foucault in his lectures in the years 1981-1982 on "the hermeneutics of the subject" (Foucault 2005). It is worth recalling at this point that Foucault, while studying medieval Christianity and Hellenistic culture, found the rituals of producing the truth that developed and transferred to the social and institutional relations present in contemporary

society, for example, in the judiciary, medicine, education, or in the family (cf. also Rose 1990; Taylor 2010). The rituals of the manifestation of truth were described by him as alethurgy. Alethurgy is "the manifestations of truth as a set of possible verbal and non-verbal procedures by which one brings to light what is laid down as true as opposed to false, hidden, inexpressible, unforeseeable, or forgotten" (Foucault 2014:7). Following Foucault's lectures, we assumed that the criteria used to differentiate alethurgy types are:

- procedure of extracting the truth,
- modality of knowledge, and
- temporal orientation (see: Table 2).

The "acts of truth" are that part of the alethurgical procedures which falls to the subject. The role of the subject is threefold, that is, the subject can act as an agent (performer), thanks to whom the truth comes to light, as a spectator (witness) of the fulfillment of an act of truth, and as the actual object of alethurgy, when the truth about the subject is spoken. The purest form of the latter case is a confession, which is also an expression of the complete act of truth, in which the subject is both the performer of alethurgy, its witness, and its object (Foucault 2014). In *The History of Sexuality*, Foucault described how modern man has become a confessional subject. In turn, in his lectures at the Collège de France in the years 1979-1980, he included the issues of confession in the framework of research into government. It is worth emphasizing at this point that the term "government" has a comprehensive meaning, as it includes techniques and procedures for managing one's own and others' conduct: "it designated the way in which the conduct of individuals or of groups might be directed: the government of children, of souls, of communities, of families, of the sick" (Foucault

1982:221). In the case of research into the practice of confession, it was about a specific form of government, that is, “government by the truth”—“the regime of truth” (cf. Foucault 2014).

Discourse researchers such as Brendan K. O’Rourke and Martyn Pitt (2007) highlight the “technology of the confessional” that works both in everyday social interactions and in research practice. Their research based on interview data exemplifies the combination of Foucault’s insights into discourse with techniques of conversation analysis. In general, empirical research identifies contemporary confessional practices in various areas of social life, for example, in the field of therapeutic intervention, lifelong counseling, “mediated” parenting, effective learning, or educational policy (cf. Besley 2005; Fejes and Dahlstedt 2013; Fejes and Nicoll 2015). A common plane of reference is Foucault’s claims about a confessional society (cf. Foucault 1978).

The “will to know” characteristic of Western societies, described by Foucault, triggered veridic rituals that became identifiable also in the academic space in numerous public statements. The analysis led to answers to questions about how the truth is revealed, to whom, and what is the subject of it. The concepts related to alethurgical strategy drew our attention to the problem of the discursive production of knowledge in relations with “the other.” The “other” was not, however, identified with a psychophysical being, but with any form of audience. In alethurgical analysis, the constitutive argument of Foucault’s philosophy about the omnipresence of power relations took the form of discursive practices defined as prophetic alethurgy and testimony alethurgy. They are both a tool and an effect of governing oneself and others using “truth.”

Table 2. Analytical categories—alethurgical discourse analysis

Analytical categories	The procedure of extracting the truth	Modality of knowledge	Temporal orientation
Divine (oracle) alethurgy	Based on consultation logic	The truth of overview in the creator’s strength; seeing, saying, looking, and discourse unity	Linking the present and the future (obligations, prohibitions, predictions)
Slave (testimony) alethurgy	Based on interrogation logic	The truth of overview in the witness’s seeing, saying, and looking	Linking the present and the past (recollections, memories, confessions)

Source: Self-elaboration.

In our studies, using the analytical categories presented in Table 2, we analyzed the rituals of truth production in academic discourse. Statements about the reform of science and higher education were formulated both in the formula of oracle alethurgy and testimony alethurgy. In the former case, they were based on the scientific type of knowledge and methods of producing it. The temporal orientation of the analyzed discourse revealed the discursive connection of the present with the future for such purposes as:

- justification for the need for change in higher education,
- justification for a critical reflection on the ongoing changes (Spychalska-Stasiak and Ostrowicka 2020).

On the other hand, *testimony alethurgy* took the form of confessions. A confession is an alethurgy in which the author of the statement is also its subject. The speaker speaks about himself or herself, about his or her experiences, emotions, actions, successes, and failures, experiences, and plans, et cetera.

We analyzed the phenomenon of academic confession taking into account the statements of professors (including the professors performing political functions) and beginner researchers (PhD students and PhDs) published in the popular science monthly *Forum Akademickie*. The analysis of the statements they formulated revealed differences in the object and form of the confession, as well as the instances that launched the “discourses of truth” of these three, and not other entities (Ostrowicka and Spychalska-Stasiak 2018).

The professors’ statements shared the specific rhetoric of “a man with experience,” and their confessions were built as part of the reflection on their own biography and the reasons for the decisions made by them in their lives in the context of systemic changes, university changes, and academic work conditions. Stories about their own research careers were often emotional and self-critical.

The statements of academics who, apart from their scientific role, also indicated their political commitment, were particularly demanding in terms of interpretation. The discourse of academics-politicians was subordinated to a specific strategy of functionalization, resulting in a clear embedding of confession in the context of professional activity. Emotional descriptions of experiences and individually shaped understanding were replaced here by distanced statements of a witness participating in the management of science and higher education.

In turn, the top-down control of both the subject matter and the form of a statement was a special feature of the confessions of the so-called beginner researchers. The confessions of doctoral students and doctors were subordinated to the convention adopted by the editorial office. This group includes the statements of:

1. laureates of the competition organized by the publisher of *Forum Akademickie* under the title “Complicated and simple. Young Academics about Their Research”; the form of the laureates’ statements had to be adjusted in order to conform to the established regulations,
2. young lecturers, who addressed short, several-sentence letters to the expert appearing in the journal, hoping to be helped in solving the teaching dilemmas experienced; their form had to be in line with the convention of the column called “Our expert advises,” devised by the editorial office,
3. participants in the “Top 500 Innovators” program organized by the Ministry of Science and Higher Education, who during the interview presented their reflections on their stay at Stanford University.

The confessions of young academics were, therefore, focused on the characteristics of the method of conducting research, the experience gained on their basis, and on the good and bad sides of research and teaching work, as well as on the specificity of the Polish academic milieu.

The journal *Forum Akademickie* was also a space for the formation of a discourse on the parameterization and evaluation of the academic activity. In this case, we were dealing with the mutual reference of

the alethurgy of testimony with the alethurgy of the oracle. The latter was considered significant when it was based on experience. Participants in the discourse on parametrization played different roles, that is, those of:

- performers—evaluators, thanks to whom a certain “truth” about Polish academia was revealed,
- witnesses of the fulfillment of the act of truth in the evaluation procedure,
- the subjects of alethurgy, since the truth about them, their academic position, and identity was told (Ostrowicka and Spychalska-Stasiak 2020).

In other words, the truth was manifested, if the “prophet” who presented visions of the future of the university was at the same time a “witness” experiencing parameterization.

Selecting for our analyses categories relating to veridic practices, we linked discourse analysis with the concept of alethurgy, which directed the research towards procedures of extracting the truth, the modalities of knowledge, and temporal orientations in the discourse on the reform of higher education in Poland. Confession as an analytical category in discourse research led to the concentration of the analysis on selected aspects, that is, the author, subject, and form of the statement, and encouragement to speak, that is, whom/what (what instance) demands confession. The basis of the applied alethurgical strategy was interest in the relationships between the rituals of manifesting the truth about academia and the mechanisms of government. Studying alethurgical practices, we discovered the “regime” of governing oneself and others through “acts of truth,” that is, discursive practices in which the subject of academia referred to some truth as part of

the alethurgy of the witness or the alethurgy of the prophet. The alethurgical strategy of analysis makes it possible to extract, in the general phenomenon of the discursivization of academic work, those elements which situate discourse participants in relation to the truth.

Dispositif Discourse Analysis

The dispositif strategy in discourse analysis derives its assumptions from several works by Foucault, in which he described, and genealogically analyzed, the different variants of the mechanisms of disciplinary, juridical, and neoliberal power (cf. Foucault 1977; 1978; 2008; 2009). The dispositif as a theoretical and analytical category in discourse research includes in its scope of interest those factors that are sometimes referred to as extra-discursive. I mean here, first of all, the organizational and material elements of social reality. However, at the root of Foucault’s concept of the dispositif is an attempt to abandon the opposition between what is discursive and non-discursive, and the basic message becomes the functionality of a specific set or system (*ensemble*) of discursive and non-discursive elements as a *mechanism of power* (Foucault et al. 1994).

The most extensive definition of the dispositif was presented by Foucault in 1977 in an interview for the magazine *Ornicar?*, emphasizing its strategic role in neutralizing and explaining sudden and non-routine situations (Nowicka 2016). But, it is in the lectures at the Collège de France in the years 1977-1979 (Foucault 2009) that we find analyses of the various modalities of the dispositif (i.e., juridical, disciplinary, and security dispositifs) and their functions. Staying close to Foucault’s concept, in the dispositif strategy of discourse analysis we focused on the study of the various modalities of the dis-

positif, aiming at the reconstruction of governmentality processes. Owing to the significance of the concept of discourse in the research on the dispositif, the applied strategy can be considered a variant of the so-called dispositif analysis. This trend in the

reception of Foucault's ideas has significantly developed in recent years (e.g., Bührmann and Schneider 2008; Truschkat 2008; Wengler, Hoffarth, and Ku-mięga 2013; Ostrowicka 2019; Nowicka-Franczak in this volume).

Table 3. Analytical categories—dispositif discourse analysis

Analytical categories	Normative order	Techniques of power	Fields of visibility	Subject objectifications
Juridical dispositif	Codifying (law-making)	Legislation, Juridification, judicial apparatus	Legal acts, the territory of the law-governed state	The subject of law, sovereign
Disciplinary dispositif	Disciplinary normalization (the distinction between normal and abnormal)	Prevention, formation, supervision, order, examination, punishment, hierarchization, centralization	Panopticon, total institutions	The subject of discipline, individual body
Security dispositif	Normalization (optimization, regulation)	Conduct of conduct, intervention, mobilization, control, indexing	Statistics, economy, environment	Responsibilized subject, population

Source: Self-elaboration.

In the dispositif strategy of discourse analysis, “the dispositif” is a theoretical concept and, therefore, contains some general statements about the prototype modalities of power. The individual analytical categories (i.e., normative order, techniques of power, fields of visibility, objectification of the subject) used in the conducted research on the governmentality of the university have been listed in Table 3. The juridical, disciplinary, and security dispositifs have been classified in the

categories of prototype mechanisms, the contemporary transformations of which can be reconstructed using discourse analysis (Raffnsøe, Gudmand-Høyer, and Thaning 2014). The dispositif strategy was not a closed set of concepts, but expressed preferences in terms of the categories of the analysis of power in its various forms. The research was aimed at thematically and functionally identifying discourses related to science and academic education, as well as the mechanisms of

law, discipline, and security co-operating in the reforming of the university.

The conducted research has shown that a network of knowledge-power relations, absorbing knowledge about the population of students and academic teachers and introducing interventions at the three-fold levels of individuals, groups, and institutions, was created in the system of higher education in Poland which was subjected to change. In academic discourse, a responsibilized, entrepreneurial university is also a repressed university.

The change in the evaluation of academic activity, which introduced quantitative indicators for the assessment of the productivity and quality of academic work, intensified a discourse of two kinds. On the one hand, the statements of academics expressed the reaction of the academic community to the core of the introduced modifications, while, on the other hand, they became an expression of (re)defining the subjectivities constituting the social order of the university. Thus, along with the broadly understood criticism of parameterization, three types of subjectivity and the rationalities characteristic of them were revealed, that is, defensive, adaptive, and entrepreneurial (Ostrowicka and Spsychalska-Stasiak 2020).

In the case of students whose position and status change with the change of the university model, we could see their progressive economic functionalization. The discourses of international organizations such as the European Union, the European Higher Education Area (created under the Bologna Process), and the Organization for Economic Cooperation and Development, played a major role in determining the goals of the student population and the techniques to be used to help them imple-

ment these goals. Adopting their perspective made it possible for the Ministry to define higher education and students mainly by relating them to the knowledge-based economy to be created and to the current needs of the labor market. The conceptualization of students as a “product,” and previously as “material,” made it possible for the government to assign specific roles to the individual actors in the field of higher education, that is, to universities, the government, employers, and students. These roles were distributed as follows:

1. the task of higher education is to satisfy employers' needs for a qualified workforce and to create a human capital base;
2. the government's tasks include the transferring of information between the labor market and high school graduates in order to make the choices of the latter rational, that is, in line with the needs of employers, forecasting economic changes, and ensuring the legal framework and adequate financing for education;
3. the task of universities is to adjust educational programs to the needs of the economy and employers, indicated by the government, among other things by including the latter in the planning of teaching work;
4. the task of employers is to inform about their needs and, possibly, to cooperate with universities to establish educational programs that are favorable to them;
5. the only task of high school graduates is to rationally match their educational choices to the signals from the government, labor market, and universities.

The implementation of thus conceptualized goals required the use of a number of techniques. The following mechanisms have been introduced to combine the disciplining, hierarchization, and control of students with neoliberal regulations at the system level:

- information mechanisms making it possible to coordinate activities between the different actors of higher education;
- mechanisms used by the Ministry to directly affect the provision of the supply of educational courses;
- mechanisms to differentiate and hierarchize universities (Stankiewicz and Ostrowicka 2020a).

Mass education has become a debated issue for the media, the university, and for government representatives. The dominant discourse promoted the pattern of higher education as an elite good, in which the presence of the masses posed a constant threat to society and its development. One of the solutions for the threat emerging in various areas has become the progressive juridification of the system (Stankiewicz and Ostrowicka 2020b). The more and more advanced tools for collecting information were accompanied by the proliferation of legal regulations, while “amending” them on a permanent basis forced attention, constant translation of regulations, and adaptation. The changes in the law carried out from 2011 to 2014 resulted in the achievement of a few objectives:

1. creating a system of competition between institutions of science (within the public and non-public school sector) and between employees, both in the area of science and education,
2. contractualization and formalization of relations between entities of the higher education system

(including the relations between higher education institutions and students),

3. limiting the opportunities for cronyism or nepotism in the academic community by introducing a system of bureaucratic control,
4. putting higher education institutions within the area of influence of external entities, that is, the state and entrepreneurs (Stankiewicz and Ostrowicka 2020b).

It is worth noting here that such deep mechanisms of competition within the higher education system were a new phenomenon in the Polish situation, contributing to the polarization of public debate (Dziedziczak-Foltyn 2017; Stankiewicz and Ostrowicka 2020b).

Our research has shown that the contemporary subject of academia has become not only the object of systematic observation, but is also itself motivated to observe in order to be well informed. In the new cultural context, old, proven technologies of power have created new hybrid networks of relations, integrating potentially conflicting and competing discourses. The culturally grounded assumption about the cause-effect relations between the school and the labor market (learning outcomes and vocational preparation) has brought together the main participants in the debate (university students/graduates and their employees, employers, and entrepreneurs) and have become the basis for the construction of the discourse on universities as “factories of the unemployed” (Ostrowicka and Stankiewicz 2019), and also made it possible to undermine the value of education in the field of the humanities and to develop the syndrome of “the crisis of the humanities.” Humanists, along with entrepreneurs, were the most

active group speaking in the press. Their voices expressed primarily dissatisfaction with the direction of the reforms. In general, analyses of the methods of the academic problematization of the reform showed that for the so-called ordinary academics, not directly involved in the implementation of the proposed changes, it is an external and foreign creation. This position “towards” the reform and the exogenous nature of regulations made it possible for academics to develop a rationalizing framework for reacting to the changes, that is, their acceptance, opposition, resistance, passivity, or indifference. The resistance to the reform, when it was connected with attempts to formulate a positive project of academic identity, was based on ethical discourse and recalling the ideal Humboldtian type (see: Chomik and Ostrowicka 2019; Falkowski and Ostrowicka 2020).

Summing up, the *dispositif* analytical strategy revealed the coexistence and interaction of the mechanisms of law, discipline, and security in the efficient governance and reform of higher education in Poland. Statements formulated in a media or academic context understood as carriers of power and as an integral element of disciplining, juridification, and securitization techniques have been analyzed through the prism of normative orders, power techniques, fields of visibility, and objectification of subjects. In the general phenomenon of discursivization of the problems of higher education, the concept of *dispositif* in discourse analysis brought out the multidimensionality of power relations and the usefulness of various types of knowledge, the interpenetration of strategies of managing an individual and population, codification, normalization, and other regulatory practices. The way of connecting various heterogeneous techniques of power or normative orders and their contemporary implementations have shown the

specificity of the discourse constructed in a specific historical and socio-political context. I hope that the combination of *dispositif* analysis with archaeological and alethurgical analysis in one research project has made it possible for us to capture the ambiguous, theoretical concept of discourse in its various empirical versions while remaining in line with the post-Foucauldian perspective.

Discussion and Concluding Remarks

Undoubtedly, the development of post-Foucauldian discourse analysis belongs to an important stream of qualitative social research. We can follow the process of constituting this research perspective in the context of other methodological trends, drawing to a different extent and for a different purpose from Foucault's work. The process of reception on the basis of methodology is visible in, among others, textbooks for social research. For example, in well-known works edited by Norman K. Denzin and Yvonna S. Lincoln, there are two chapters entirely devoted to the interpretation of Foucault's methodology (see: Holstein and Gubrium 2005; Scheurich and McKenzie 2008). On the other hand, the books by David Silverman (2001; 2005) provide many examples of the involvement of Foucault's thought in specific research projects, but they do not devote any space to the description or explanation of the concepts characteristic of this philosopher. Overall, these and other social research methodology textbooks prove that Foucault's concepts appear on three levels in research projects. First, as an epistemological frame overriding categories derived from other approaches (e.g., phenomenography, frame analysis, conversational analysis, grounded theory, narrative research). This is how Foucault's concepts of discourse or “the politics of truth” often function. Secondly, as analytical tools subordinated to the research goals formulated in the framework of “non-Foucauld-

ian” theoretical trends. This is what happened with, among others, the categories of the panopticon and disciplinary power that are used in research based on the “non-Foucauldian” version of critical theory (cf. Scheurich and McKenzie 2008). Third, and finally, Foucault’s ideas and concepts are used as categories equal and complementary to others, such as in the proposal by James A. Holstein and Jaber F. Gubrium (2005) linking Foucault’s concepts with ethnomethodology or, in my earlier research, integrating Foucault’s concept of dispositif with Reinhart Koselleck’s historical semantics (cf. Ostrowicka 2019).

In terms of the methodology of discourse analysis, at least two tendencies are visible. On the one hand, Foucault’s approaches to discourse are considered to be the basis for creating new, comprehensive, and independent theoretical and methodological concepts, such as Critical Discourse Analysis, Argumentative Discourse Analysis, Discursive Institutionalism, or the Sociology of Knowledge Approach to Discourse (see: Leipold and Winkel 2013). On the other hand, discourse researchers emphasize the specificity of the post-Foucauldian perspective, recognizing that it is more than just a loose inspiration from Foucault’s conceptualism, and looking for common points for the so-called research perspective. It is worth adding that this task is not facilitated by the growing number of discursive studies (see: Angermüller, Maingueneau, and Wodak 2014). There are discussions about whether there is one methodology for post-Foucauldian discourse research, and if so, what constitutes its assumptions, basic strategies, and tools (cf. Diaz-Bone et al. 2007). Two decades ago, Johannes Angermüller (2001) distinguished two trends in post-Foucauldian research, that is, pragmatic, micro-sociological analyses, and post-structural, related to linguists’ interest in ideological analyses. Over time, the state of reception has become more diversified within specific

disciplines and in interdisciplinary research, and as a result of the development of discourse studies as a research field aspiring to take up transdisciplinary problems.

The issue of the development of post-Foucauldian methodology is also part of a more general dilemma, which can be expressed by the question: are we not contradicting the Foucauldian principle of the author’s transgression by formulating rules of discourse analysis that would be consistent with Foucault’s methodology? Foucault’s writing gives us an aporia that is difficult to overcome, the creative potential of which lies in the possibility of transgressing the state of “current” or “obligatory” interpretations. Certainly, there are already important and valuable proposals for the methodology of post-Foucauldian analysis, only a fragment of which was noted by me in the earlier parts of the article. However, thinking similarly to Bernadette Baker (2007) and Antti Saari (2017), I believe it would be highly problematic for the post-Foucauldian perspective to become a monolith that inhibits the generation of new approaches to discourse research. Saari (2017:102) is right when he writes: “If Foucault’s works are to be relevant in the future, they must be kept from solidifying too much into methodological checklists and rigid concepts.” The analytical strategies described in this article are an expression of our experimenting with concepts scattered in various works by Foucault and trying to integrate them into one research project. The identification of three strategies is an *ex post* activity, that is, a secondary reflection on the set of analytical categories used. For I am close to the conviction that at the stage of analyzing research materials, a rigid separation of the three stages (and methods) in Foucault’s writing is unnecessary, because, in research practice, they often combine and complement one another. Based on the example of the research proj-

ected led by me, I have tried to show the possibility of complementary use of three different, but related and complementary, analytical strategies that emphasize the ambiguity of the concept of discourse and its relationship with the categories of knowledge and power. In this integrative approach, I see the value of the synthetic form of the methodological proposal described here. Its weakness is certainly the fact that it is the result of choice and selection from many other possible combinations.

In my opinion, however, discourse studies, like any other theoretical and methodological trend, are activities that reduce complex social reality. As Ludwik Fleck (1986:122-123 [trans. HO]) aptly noted years ago, “it is altogether pointless to speak of all the characteristics of a structure. The number of characteristics can be as large as desired, and the number of possible determinations of characteristics depends upon the habits of thought of the given scientific discipline.” Post-Foucauldian strategies are an expression of a directed perception of those elements of reality which, as part of a certain community of thought (or a “thought collective,” as Fleck would say), are seen as important. It has been known for a long time that Foucault did not provide a systematic interpretation of his method, and he used many of the concepts important to him in various functions and meanings. However, this did not hamper discourse researchers; on the contrary, it inspired them to transfer Foucault’s ideas to new territories, absent in the philosopher’s *oeuvre*. This was also the case, for example, in the field of research on higher education (cf. Sousa and Magalhaes 2013; Ostrowicka 2018; Angermüller et al. 2019).

In this article, I have described in a synthetic form the theoretical and analytical categories, which have become important in the research project I am managing on the discourse launched in connection with

the reform of higher education in Poland in the years 2011-2014. The large-scale research objectives, encompassing discourses constructed in three institutional contexts (those of science, the government, and the media), were based on the notions and ideas of Foucault, but were not limited exclusively to them.⁶ Preferences in terms of specific categories have led me to distinguish and use three analytical strategies, that is, archaeological, alethurgical, and *dispositif*. Assuming a certain level of generality, it may be concluded that these strategies are characterized by the different placement of accents in the analysis and understanding of discourse. In the archaeological strategy, discourse becomes a synonym of knowledge. The researcher is interested in its formations (of knowledge) in discursive practices. In alethurgical analysis, the focus is additionally on the speaking subject and the mechanisms in which knowledge is manifested as truth. Here, discourse becomes, in the Foucauldian sense, the “regime of truth.” On the other hand, the *dispositif* strategy aims at the reconstruction of specific relations on the knowledge-power-subject axis in the form of discipline, law, and the security *dispositif*. In this case, discourse is seen as a certain semiotic “order” of diversified power mechanisms.

The use of different analytical strategies in one research project was, in our case, like a trek across uneven terrain, starting from multiple points to capture the landscape of higher education reform both in the near and far perspectives.

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⁶ Important sources of inspiration were also the theory of public debate and crisis by Bob Jessop (2002; 2008) and Waldemar Czachur’s (2011) concept of the discursive image of the world.

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Writing Tales of the Future: Five “Balancing Acts” for Globographers

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Abstract: Since the early 1990s much has been written about how ethnographers should do fieldwork of the local in a globalizing world. The challenge of communicating their analyses authentically in a world of information overload is much less debated. To rectify this situation, I argue in this paper that five balancing acts are crucial to those who do ethnographies of the global, or “globographers,” in their writing. Emerging from a review of the history of fieldwork and writing, these balancing acts constitute a template of how a communicative consciousness may assist qualitative researchers in achieving ethnographic integrity.

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In his review of the second edition of *Tales of the Field*, sociologist John van Maanen’s influential book on doing ethnography, first published in 1988, John Goodall (2010:261) writes:

Since *Tales of the Field* was published in 1988, rampant globalization, violent extremism, failed states, new media, rising economic and political powers in Europe and Asia, the specter of global warming, and a host of other challenges have demonstrated that how we think about organizations and report research about them has extraordinary potential for new forms of expression and impact.

Following Goodall, this paper argues that qualitative research methods are very well suited to advance these “tales of the future,” despite the momentum of Big Data analytics and the advent of “digital positivism” (Fuchs 2017). However, this position requires a more coherent approach to the place of ethnography insofar as it helps us to “develop *languages of the social* that help us to make sense of the world in which we live” (Glaeser 2005:37, italics added).

A step towards this goal is to solidify the process of writing “globography.” Coined by Hendry (2003), globography is not expounded as a concept by her in detail. Yet, as a metaphor, it encompasses a lot of the attempts from 1990 onwards to develop a fieldwork practice that grasps how “the global” and “the local” and the various links between them are understood and acted upon by people. This does not imply that fieldwork has to be translocal or transnational. Instead, by starting out with a particular research premise—grasping the intertwined relations between sites (here and there, or “several sites in one,” see: Hannerz 2003a) and levels (micro-, meso-, macro-)—a globographic approach enables the researcher to approach the topic differently from conventional ethnography and, subsequently, write a different tale. In this paper, therefore, globography is understood as a methodological approach to qualitative inquiry.

Compared with other debates on contemporary ethnographic practices, the issue of communicating fieldwork analyses has received relatively little attention. Despite several monographs, comments on qualitative methods, and textbooks on how to write ethnographically attractive stories (Abbott 2007; Law 2007; Jacobson and Larsen 2014; Ghodsee 2016; Gullion 2016), constructing “textual representations of reality” (Atkinson 1990) *in a global context* is seem-

ingly taken for granted as something qualitative researchers know how to do. But, the stories we tell as fieldworkers do not come fully interpreted. The practice of globography is also far less explored than, and different from, conventional ethnography (Falzon 2009). Addressing the empowering link between globography and better writing is therefore just as important as discussing other criteria for research quality in qualitative studies.

Globography as a methodological approach, consequently, makes it possible to endorse certain kinds of linguistic clarity, narrative awareness, and evocative techniques as characteristics of quality research in the context of information overload. In respect of the criteria for ensuring trustworthiness in qualitative research, which in general downplay writing, focus on “storytelling” does not mean that all globographers should become novelists or playwrights. Moreover, the focus on globography as the key term does not dismiss other qualitative fieldwork traditions. In fact, this paper explores the history of ethnography on a broad scale on its way to a potential fit between globographic engagement and qualitative research standards rather than re-representing ethnography in a conventional way (Atkinson and Delamont 2008).

The rest of the paper is structured as follows. In section two, a brief literature review on the relation between writing and ethnography is introduced. After having established the need for a debate on how to write “tales of the future,” five balancing acts are developed in section three as a template on how to “side with your readers” (Booth, Colomb, and Williams 2003:xii) as globographers. This template, moreover, is fleshed out by a number of communicative beacons from various fields. As a result, the findings are transferable to other qualitative meth-

ods and practices that share a similar platform for inquiry. Finally, the limitations and possibilities of this combination as input to quality in qualitative research are discussed.

Historical Context

The ethnographer Matthew Desmond (2014:553) provides a point of departure to this discussion by claiming that the analytical possibilities available to any analyst depend on the kinds of questions asked, which, in turn, “depend entirely on the constitution of one’s scientific object.” In the early days of ethnography, this constitution of social life was operationalized in two ways. First, by *discovering* the practices of culture and societal arrangements through participant observation (Clifford 1983; Clair 2003), and second, *representing* this diversity by combining analytic innovations and textual devices to both educate and engage the reader. Two methodological elements from these early endeavors can be said to have made a lasting impact on the craft of writing ethnography: a) making field notes and b) the analytic approach to one’s observations (Sanjek 1990a; 1990b). Lewis Henry Morgan’s (1818-1881) prolific diaries, made with great detail and intricate drawings (Morgan 1959), are one of many examples. Leslie H. White (Morgan 1959:17), who edited a volume on Morgan’s field notes, points out that a characteristic feature of them was his ability to make explicit the role of the ethnographer: “Above all, he carefully distinguished between what he was told and what he himself actually saw, or otherwise ascertained to be a fact.”

As part of the post-war debate on colonial influence on writing in terms of cultural misrepresentation and reproduction of power asymmetries, the question arose of what ways the ethnographer’s view

was coloring the text (Clifford 1983; Clair 2003). By exploring Malinowski’s (1884-1942) field notes on Baloma (the spirit of the dead) as the first attempts at formalizing ethnography, Roldan (2002:391) argues that what makes his type of writing compelling is the emphasis on transparency—which later led to the conclusion that ethnographers “should be explicit about their theories and document their research processes.” Besides notable sociologists associated with the Chicago school of ethnography in the 1960s that indulged in the textual possibilities of doing this from a literary point of view (Deegan 2001), there was Clifford Geertz (1973:19), who in *The Interpretation of Cultures* claims that by inscribing social discourse the researcher “turns it from a passing event, which exists only in its own moment of occurrence, into an account, which exists in its inscription and can be reconsulted.” Similarly, in the 1980s, ethnographers like James Clifford and George E. Marcus (1986), John Van Maanen (2011), and the abovementioned Geertz (1988), all thematized the claim that “content, by itself, doesn’t really accomplish anything; the knowledge that ethnography produces emerges from the relationships formed among writers and readers” (Kahn 2011:184).

This empowering diversification of the researcher’s position in the text led to a plethora of different approaches to writing ethnographies. For example, to avoid the criticism of inventing rather than representing cultures (Clifford 1986:2), and the idea that ethnographic realism was in fact “real” (Jacobson and Larsen:182; see also Brodkey 1987), Van Maanen (2011) argued that ethnographies should be read differently: as a realist, impressionist, or confessional tales created by the ethnographer. Furthermore, as Crapanzano (1977) and later Tedlock (1991:69) argued, it was no longer necessary to make a choice between “an ethnographic memoir centering on

the Self or a standard monograph centering on the Other,” as they were inseparable in practice and, thus, should be communicated when transforming societal processes into written text. To some, the postmodern turn of this development drifted into an anything-goes attitude that increased the risk of devaluing qualitative research in general (Spiro 1996). In contrast to Geertz (1988) and others who, according to Roldan (2002:378), “consider ethnography as a writing genre,” critics argued against the idea “that ethnographic authority depends on the author’s capacity to persuade—or to get the complicity of—readers by simply using literary resource” (Roldan 2002:378).

While the combination of using techniques from fiction and preserving the analytical gaze was particularly stretched in the postmodern writings of social science, it was also challenged anew in the 1990s on a much less debated area. With the emergence of multi-sited ethnography (MSE) (Marcus 1995; 2007), global ethnography (GE) (Burawoy 1991; 2000), and other forms of translocal ethnography (Glaeser 2005; Desmond 2014), it became reasonable to expect that textual representation should be reconsidered, as the sociological circumstances for doing fieldwork differed from the context that had formed the previous debates. According to anthropologist Ulf Hannerz (2003b:206, *italics added*), sites in translocal fieldwork are “connected with one another in such ways that the relationships between them are as important for this *formulation* as the relationships within them,” which makes such a study different from a mere comparative study of localities. Consequently, the researcher has to place oneself “at critical points of intersection of scales and units of analysis and...directly examine the negotiation of interconnected social actors across multiple scales” (Gille and Ó’Riain 2002:279). “The field,” in other

words, is to an increasing degree composed by an ethnographic sense of intersections rather than of fixed dimensions (Næss 2016).

In the new world order after the Cold War, not least when considering the invention of the Internet and its transformation of society (Graham and Dutton 2014), this rescaling of life conditions was internalized by an increasing share of the globe’s population. For sociological ethnographers, who “hardly ever aim at giving holistic representations of clearly bounded (small) groups” (Nadai and Maeder 2005), these circumstances inspired new perspectives on “developing case-specific causal accounts that derive their authority from an in-depth explication of the cultural contexts of action” (Voyer and Trondman 2017:5; based on Reed 2017; see also Burawoy 2000). Furthermore, sociological ethnographers accepting this outlook aim “to build maximal interpretations that explicate landscapes of meaning—the historically grounded, discursive sense-systems motivating action and forming the ways in which people act” (Voyer and Trondman 2017:5; based on Reed 2017). Although the disciplinary consequences of this position are not the topic of this paper, the communicative opportunities it creates certainly are—especially since the special issue of *Ethnography* edited by Voyer and Trondman (2017), where this methodological position was promoted, omits the difficulties of writing sociological ethnography.

The idea of doing fieldwork unbounded by Malinowski and conventions is not a new one. It was practiced most notably by Max Gluckmann and others from the 1950s onwards (Burawoy 1991; Glaeser 2005). But, its impact on writing was rarely discussed among translocal ethnographers in the 1990s. In contrast to sociological ethnographers like Burawoy, it was one of those critical of translocal eth-

nographies—Clifford Geertz—who again provided an answer by making the new demands of writing explicitly. Grasping the connections between local life and global forces, Geertz (2000:227) argued, “demands an alteration of not only the way we conceive of identity, but of the way we write about it, the vocabulary we use to render it visible and measure its force.” In practice, this communication tactic was changed either as part of the theoretical choice or as a reconsideration of “the field,” as mentioned above. Regarding the former, Burawoy (2013:533) touches upon this in his biographical essay on ethnographic fallacies:

Some have said the problem lies in the theoretical presuppositions that I took with me to the field, presuppositions that blinded me to the reality of the field. I would claim the opposite—the problem was inadequate attention to theory.

Regarding field perceptions, Marcus—who in earlier publications (1986; 1995) cherished the “messy” nature of its writing—now emphasized the increasing mismatch between the characteristics of conventional ethnography and the writing styles needed to grasp the new social circumstances. In a 2007 essay, he praises the “baroque” character of contemporary ethnographies which, in contrast to a convention, are the result of the release of “the traditional writing tropes of ‘being there’ and place ethnography as a discursive field into its networked and nested knowledge paths” (Marcus 2007:1131).

Both Burawoy and Marcus, therefore, add important perspectives to the discussion on writing tales of the future. It is not my intention here to decide the efficiency of the above approaches to ethnographies of the global (see: Burawoy 2017 for further

debate). What can be argued is that the systematic aspects of crafting textualized presentations of reality are left between the lines by both authors. This paper aims therefore to draw attention to why theoretical differences and field understandings should impose epistemological aspects of writing rather than deprioritizing them. Even more, it is a call for rationalizing attention to communicative tactics as part of the ethnographer’s broader aim to improve the art of doing participant observation of people in their natural settings in order to increase the methodological relevance of that observation in contemporary society. Reaching the audience, as emphasized by Booth and colleagues (2003), requires that the ethnographer thinks like a reader—and understands why they need “to begin reading with a sense of the whole and its structure” (Booth et al. 2003:209).

This requires us to grasp “the whole” in new ways, as translocal fieldworkers do. Geertz (1995:100-102) was skeptical about what he (somewhat pejoratively) called “gas station ethnography,” because “as old certainties and alliances dissolved...we, it seems, are left with the pieces” (Geertz 2000:220). Yet it is exactly these pieces and our ability to put them together into explanatory images that are pivotal in developing new perspectives on human activity. To communicate these connections to contemporary readers, and to gather the splinters from old world views (Biehl & McKay 2012), I argue that five balancing acts in writing are crucial. These balancing acts are cumulatively organized and correspond with established quality criteria in qualitative research, because, instead of using the misleading criteria of quantitative methodology to evaluate qualitative research (Baskarada and Koro-nios 2018), they are central to writing, as well as to ethnographic integrity.

Table 1. Five balancing acts and their corresponding criteria for research quality

Quality criteria	Continuum
Confirmability	Authority $\longleftrightarrow$ Humbleness
Transferability	Change $\longleftrightarrow$ Continuity
Credibility	Realism $\longleftrightarrow$ Faction
Authenticity	Rigor $\longleftrightarrow$ Simplification
Resonance	Involvement $\longleftrightarrow$ Distance

Source: Self-elaboration.

These concepts should not come as a surprise to sociological ethnographers, or to qualitative researchers in general. Yet being reflexive about communicative practice is an underdeveloped topic when it comes to establishing trustworthiness in qualitative research. On that note, we turn to the five balancing acts.

Balancing Act 1: Authority $\longleftrightarrow$ Humbleness

The major privilege of the ethnographer is that he or she “was there”—the stories told are not based on secondary sources, but participant observation in those situations that are crucial to understand and explore the research topic. Raw data gathered from being anywhere, however, do not constitute a knowledge product. In translating experience into textual form and acting as a purveyor of truth (Clifford 1983:120), the ethnographer acquires a kind of authority that comes in different shapes: experiential, interpretive, dialogical, polyphonic (Clifford 1983:142). It is difficult to convey authority in writing unless one is humble about one’s epistemological

foundation. Epistemology understood as the theory of the existence of a knowable reality and the means for knowing it (Salamone 1979:47), has been debated for years in relation to fieldwork (Sardan 2015). While overconcern with epistemology can lead to “sterility that is more concerned with methodology than content” (Salamone 1979:47-48), the opposite can also be true:

The problem is more the plethora of data, for the relationships and analysis of data seem overpowering in the initial stages of empirical science. In addition, founders of new disciplines must demonstrate that they are dealing with a kind of reality not subsumed under other disciplines. Such a stand entails a number of epistemological presuppositions. [Salamone 1979:48]

Although globography does not qualify as a new discipline, the debates on the distinctiveness of translocal fieldwork and the sociological version of ethnography nevertheless demonstrate that epistemological clarity creates the potential for ethnographic studies of the global. One reason is that doing fieldwork at and away from the home blend in practice for today’s globographers. Wiederhold (2015) exemplifies this with her study of the Manufacturing Belt town of Wilmington, Ohio, in the US. Considering herself a native to Wilmington, having grown up nearby, she nevertheless finds it difficult to accept complete insider status for identity reasons. At the same time, she acknowledges the fact that her personal relation to the place separates her from other American ethnographers in Ohio without such relations. Reflecting upon this complexity makes us go beyond the dated insider-outsider issue in ethnography and into the epistemological conditions for trustworthiness. In other words, which epistemological presuppositions it is necessary to

clarify is not the issue here, but how these can be made explicit.

In terms of writing, this position is exposed in Rowe's prison studies (2014). She shows that it can be beneficial "to explore the epistemological possibilities of making the self of the researcher visible" (Rowe 2014:404). To illustrate this, Rowe shares some of her field notes, which are rich in situations where a reflexive balance between exposing and protecting her own identity—that goes far beyond the sociologist—enables and constrains routes to information on prison life. I shall not recite them here, but because imprisonment is a specific physical embodiment of power and control, without making her own identity a part of the fieldwork, ways of knowing would be limited. The very experience of becoming involved in the prison world would have been different—and thus generated other kinds of data—had she not been able to draw upon "our embodied and subjective presence in the field," which becomes "both a source of substantive understanding and a solution to the discomfort and compromises that even marginal participation in a complex field like a prison inevitably entails" (Rowe 2014:414). Consequently, although one's persona can be a part of the story on an emotive level, as I will come back to below, this balancing act is founded on deeper reflexivity of epistemological varieties.

Balancing Act 2: Change ↔ Continuity

Any social system or phenomenon has its tensions between the past, the present, and the future. Focusing on storytelling rather than the storyteller means paying attention to how narrative often mirrors the primary elements of the phenomenon (Carr 1986). Herein lies a caveat—using the concept of the narrative without liability may reduce its potential

as a technique. Desmond (2014), who contrasts both GE and MSE in his "transactional accounts of social life" (see: Burawoy 2017 for debate), seeks explanations "in contingent relational pathways presented in *narrative terms*" (Desmond 2014:551, *italics added*), but does not explain what he means by a narrative. However, Ewick and Silbey (1995:198) offer a definition:

First, a narrative relies on some form of selective appropriation of past events and characters. Second, within a narrative, the events must be temporally ordered. This quality of narrative requires that the selected events be presented with a beginning, a middle, and an end. Third, the events and characters must be related to one another and to some overarching structure, often in the context of opposition or struggle.

This form of narrative can be divided into two strategies, which can both be used to balance change with continuity. Czarniawska (2004:119) names these "feedforward" and "feedback." The former looks at the presentation of the history—the story so far. The latter looks at the selective fashion in which the narrative is reversed. An example that demonstrates—at least when read—the latter strategy is Thomas Hylland Eriksen's monograph *Boomtown: Runaway Globalisation on the Queensland Coast* (2018). It details the complex relationship between environmentalist worries and economic strides. Although fieldwork is concentrated on the city of Gladstone and primarily affects the locals, the twofold challenge of improving the climate and keeping their jobs in energy-intensive industries is impossible to confine to city limits.

To illustrate this dilemma, Eriksen (2018:xiii)—in the very first sentences on the very first page of the prologue—offers the following description:

In Gladstone, even the sunset is sponsored by the fossil fuel industry. To watch the sun setting in the west, you must also simultaneously stare at the three tall, symmetrical columns of Gladstone Power Station. The largest in Queensland, the power station feeds on black coal from the interior of the state and, doubtless by coincidence, it was placed in the exact spot where the sunsets.

Eriksen then goes back in time to trace the relations between the everyday struggles of ordinary citizens, the politicians’ paradoxical job of creating jobs while protecting the environment, and the corporate interests where making a profit is a requirement for saving jobs, in order to understand the social dynamics of “overheating”—an umbrella term to metaphorically categorize the interdependence of economy, climate, and community and the politically induced gridlocks that may burn it all down. Along the way, as Eriksen explores one topic after another and encounters numerous informants, he builds an argument that, within such a complex fabric, the narrative structure is unavoidable. His selection of “evidence” is seemingly decided by its ability to link various levels of analysis and temporalities, rather than as a quest to include as much data as possible.

Balancing Act 3: Realism ↔ Faction

Any ethnographic text combines descriptive realism (how things are) with “faction,” or “imaginative writing about real people in real places,” as Geertz (1988:141) termed it. But, to achieve this combination, ethnographers use different techniques. While some keep their creative input to a minimum, others rely on fiction to engage the audience, and in some cases explore the grey zones between travel literature, fictional works, and the thrilling features

of some qualitative endeavors (Brettell 1986). While this paper does not endorse creative elements as mandatory for good ethnographies, the “two voices” of the ethnographer—the analytic and the evocative (Charmaz and Mitchell 1996)—are better seen as allies than adversaries in the textualization of social life.

More specifically, “ethnographic fiction,” as described by Jacobson and Larsen (2014:180), means “that all cultural representations are crafted and in this sense fictional.” For that reason, ethnographies become “partial truths structured by relationships of power and history.” The latter element is for example evident in global ethnography (GE), where Burawoy (1998:6) claims that “the postcolonial context provides fertile ground for recondensing these proliferating differences [on the politics of development] around local, national, and global links.” At the same time, Burawoy is short on what Narayan (2007) calls creative non-fiction, which includes a set of tools to shape the materials of fieldwork: “story, situation, persona, character, scene, and summary” (Narayan 2007:130). Of these tools, the scene is particularly relevant to explore as it is “not merely backdrop to plot and character but rather an active element in their constitution and believability” (Jacobson and Larsen 2014:187). What is more, the scene comprises all these materials in what Marcus (2007) calls “the most enduring trope of ethnography”: the encounter. To Marcus (2007:1135), a conscious approach to encounters taps into the credibility of the study:

The story of fieldwork relations, condensed as scene of encounter, became a powerful way to guarantee critical reflexivity—the resolved image of a complex subject opened in 1980s anthropology and closed soon thereafter—and to identify ethnography as it

came to encompass the complicated and fragmented space of the intersection of theory, its objects, and the pragmatic realities of new fieldwork situations.

An example that incorporates scenes and encounters is Anna L Tsing's (2005) *Friction: An Ethnography of Global Connection*. In the second sentence on page 1 of the book, in which she explores the contradictions and conflicts between capitalism and environmentalism in the Indonesian rainforests, she argues that: "this book is about aspirations for global connection and how they come to life in 'friction,' the grip of worldly encounter" (Tsing 2005:1). Through a series of field visits and "experimental textualization" (Biehl and McKay 2012:1212), Tsing (2005:4) gathers examples of friction and demonstrates how the "messiness of capitalism in the Indonesian rainforest exemplifies the encounters in which global capital and commodity chains are formed." These encounters, moreover, do not come with a unifying narrative. Instead, Tsing's portrayal of different scenes shows the staggering difference between how people understand the very same situations and serves two purposes. First, friction denotes competing perspectives on social phenomena, and second, "fragmentation and points of friction illuminate the situatedness of macro processes, but are also entry points for a distinct (post) humanism and politics vis-à-vis the Forest" (Biehl and McKay 2012:1213).

Balancing Act 4: Rigor ↔ Simplification

Rigor is a common requirement for qualitative researchers as "a researcher with a head full of theories, and a case full of abundant data, is best prepared to see nuance and complexity" (Tracy 2010:840). But, this is not merely a question of saturation or the technicalities of the interview. It is just as much about

the process of selecting from the data and the use of theoretical input in order to simplify the mosaic of the world. As this balancing act drifts into the *role* of theory in ethnography, we should notice the claim from Henne (2017:99): "The drive for multi-sited ethnography is as much theoretical as methodological: it advances a notion of connectivity—one that assumes a 'local' site is linked to a broader set of globalized relations." Henne's key example is Merry's (2011) research on international conventions, the quantification of human experience, and developing an anthropological theory of human rights. An example of what Merry (2011) calls "analysis of commensuration," which is "the process of translating diverse social conditions and phenomena into comparable units," this topic illustrates the theoretical consequences of decontextualizing "people, events, actions, and objects to create points of comparison and similarity" (Henne 2017:106). As indicators of adherence to human rights principles cannot give an account of the complexity of how these principles are practiced, the ethnographer is better off observing the actors and situations where human rights are an issue rather than deducing "the contours of the human rights network from a set of prefigured theoretical assumptions" (Goodale 2009:105).

In order to do so, applied ethnographers Cury and Bird (2016) suggest two approaches based on an interpretive mode of understanding. The first is "low fidelity," which "involves employing aspects of a theory, paradigm or discipline without rigidly following or wholesale adopting it in research framing, design and analysis." The second approach, "bricolage," "highlights the mixing and matching of theories: combining seemingly unrelated theories from disparate disciplines to make sense of the project's phenomenon" (Cury and Bird 2016:213-214). What matters are the characteristics of the phenomenon,

not theoretical honoring. An example that combines these approaches, without using them explicitly, is Vachon’s (2018) study of “Smalltown.” A native of the state “who grew up in a working-class community of similar size to Smalltown” enabled him to “forge strong connections with participants over the course of the project” (Vachon 2018:53). But, instead of letting this background impose on the text on all levels, and including every detail of his field movements and observations, Vachon makes a different move. His selection of data woven together with a low-fidelity theoretical approach enables him to convey the connections between macro-economic developments and local efforts by public officials to remain employed. By combining a Hemingwayesque style of short, aptly descriptive sentences with an almost poetic recitation of the urban characteristics of a New England town, the unionization of its public workers becomes a bricoleur theorization of dignity in modern America.

Balancing Act 5: Involvement ↔ Distance

Considering the space between complete detachment and “going native” is mandatory among contemporary ethnographers. Yet, there are few who exploit this space for the sake of linguistic clarity. A recurring theme in this part of the research is the insider-outsider challenge. To Desmond (2016), the presence of the self constitutes a double filter that must be dispensed of in order to gain access to the field (Desmond 2016:324). Others argue that “the silent researcher” does not exist (Charmaz and Mitchell 1996), and instead exposes “the researcher’s biases, goals, and foibles [and] how these played a role in the methods, joys, and mistakes of the research” (Tracy 2010:841). An example is a collaboration between the academic and the practitioner in Yeo and Dopson’s (2018) relational ethnography of organiza-

tional change in Saudi Aramco. While the insider position of one of them made it possible to gain access and get a head start to understand the norms of interaction, it also led to a paradox between control and connection.

Instead of bemoaning this paradox, Yeo and Dopson (2018) see it as an opportunity to create a deeper awareness of the tension between subjectivity and objectivity. In my own research on motorsport culture, it became clear almost from the start that my own predispositions and knowledge about the field could not be hidden. At the same time, I had never been actively engaged in the sport that I was researching. Consequently, I was considered an insider in some situations, and an outsider on other occasions, and had to replace the entire insider-outsider dimension with a balance between distance and involvement. In writing, this created an opportunity to engage in a more nuanced way with different perspectives on the topics under scrutiny (Næss 2016). As I did translocal fieldwork of a quite mobile phenomenon, it was relevant to inquire into the claim that “the process of data collection about mobility issues may not necessarily occur ‘on the move’” (D’Andrea, Ciolfi, and Gray 2011:154). Rather, because global processes are situated somewhere: “The multidimensionality of mobility is entwined with the researcher’s own relative positionality before, during, and after empirical research” (D’Andrea, Ciolfi, and Gray 2011:155).

In short, as supported by my own work (Næss 2014; 2016), this means that the writer has to decide when to move to the front of the text and when to step back in order to convey a mobile reality as a product of ethnographic techniques. Similarly, Sharon Wilson’s (2016:223) study of Volkswagen campers, characterized as “experimental fieldwork as an em-

bodied practice,” illustrates the relevance of writing out the moral dilemmas that emerged “where demarcations of confidentiality and privacy with familiars had elastic boundaries.” These dilemmas occurred because Wilson (2016:223) bought herself a VW campervan and used it “for identity formation and self-expression,” as well as a ticket to a culture of VW festivals. Being neither in nor out, she discovers that certain conditions must be in place in order to keep socializing, for example, being able to park near her crew at festivals. Similar to my own experiences of being immersed in the field only at times where I was naturally embedded in the action, spatial marginalization—or being placed far away from key informants—meant she had to invite herself, which led to stress and a feeling that “authentic” leisure in such circumstances became difficult (Wilson 2016:229). If she had just reproduced her observations, these considerations would not have been difficult to read into the text. By making the merger of this balance explicit, however, the study gains aesthetic merit through her emotive relation to both involvement and distance.

Conclusion

This paper has argued that “globographers” are in a special position to develop new languages of the social. Achieving ethnographic integrity in this kind of inquiry is not a matter of ticking the boxes of established criteria for quality in qualitative research—it is just as much a communicative endeavor that requires from the researcher a particular combination of scientific soberness and a persuasive mode of story analysis. Despite digitization, visual communication, “transmedia storytelling,” and other inventive ways of getting the message across, textualization still is, as it was in the 1980s, “at the heart of the ethnographic enterprise” (Marcus 1986:264).

In light of climate change, the politicization of the Olympics, or the COVID19 pandemic, tomorrow’s ethnographers, therefore, have to paint a bigger picture in order to make room for the small details. Rudimentary as they may be, the five balancing acts introduced above—and the context into which they are fitted—together work as a *sorting mechanism*. Strategically utilizing this sorting mechanism in one’s writing, moreover, makes the balancing acts correspond with established criteria for quality in qualitative fieldwork.

In the light of *confirmability*, “the qualitative objectivity of a naturalistic report” (Edwards and Skinner 2009:72), the balance between authority and humbleness provides the ethnographer with space to elaborate on their epistemological position. Quality is not produced by simply adhering to a philosophical position as there are “limits of any approach that expects research practice to conform precisely to a philosophical position” (Seale 1999:470). With regard to *transferability*, or whether the study is eligible for “inferential generalization” (Lewis and Ritchie 2003:264), the textual positioning between change and continuity gives the researcher a narrative structure on which the story can be shaped. *Credibility* is a concern for the writer insofar as one must manage doses of realism and imaginative portrayals of social life in order to enhance “the trustworthiness, verisimilitude, and plausibility of the research findings” (Tracy 2010:842). *Authenticity*, that is, whether the researcher has provided a sincere version of the story without covert motives of any kind, can be strengthened by managing the continuum of rigor and simplification of the phenomenon and the people involved. Following the ideal of “thick descriptions” can be messy unless “the action” is subject to “the director’s cut” in conveying the “truth value” of the study. The pro-

duction of this version of the story, however, needs to be transparent. Lastly, *resonance*, or the quest for a story “that moves the ‘heart and the belly’ as well as the ‘head’” (Bochner 2000:271 as cited in Tracy 2010:845): a thorough examination of one’s involvement and distancing from the field can aid the researcher when choosing to either include or exclude personal minutes to enrich the story.

Although several of the examples of these five balancing acts offered here are gathered from conventional ways of doing ethnography, and quite eclectically so, they are still particularly relevant to globography as a methodological approach. The ethnographer’s loss of exclusivity in terms of “being there” has to be countered by a more comprehensive and diverse approach to what version of “there” one

is telling. Obviously, not all translocal studies will fit the grid above, nor are the five acts exhaustive. That is not the point. Neither does it make any sense to claim that, as long as these balancing acts are represented in the ethnographer’s work, it will be flawless. The point of using them as a template for writing is that they provide ideas on how to make sense of the multiple impressions, sources, data, and mistakes that ethnographers encounter during fieldwork. As with any template, they leave a lot to be filled in, but hopefully, they provide a reasonable trade-off between guidance and flexibility. In the increasing competition for attention, the coherence produced by using the five acts described in this paper, helps the ethnographer to communicate their findings in a way that utilizing the acts separately cannot do.

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Continuing Social Constraints in Education Agency: The School Choices and Experiences of Middle-Class African American Families in Albany, NY

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Abstract: This paper explores the experiences of middle-class African American parents who have enrolled their children in a central-city public school district and the factors that inform and contribute to their school enrollment decisions. Data come from nineteen in-depth interviews with middle-class African American parents in Albany, New York. The paper uses the conceptual framework of empowerment and agency to explore and analyze the findings. Findings suggest that middle-class African American parents possess some measure of empowerment based on their human capital and positive childhood experiences in public schools. The latter denotes the salience of emotions in intergenerational education transmission. Parents' empowerment, however, does not fully extend to agency. Most parents' school choices have been structured and narrowed by racial segregation in residence and by the real and perceived racial exclusion in private school settings. Therefore, even for highly-educated, middle-income African Americans, anxieties over racial exclusion act as a strong social constraint on parents' community and school choices.

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This paper examines the school choices and experiences of an understudied group: middle-class African American parents who have children enrolled in central-city public schools. The limited literature on middle-class African Americans and schools suggests they hold very high educational expectations for their children and value education to a greater extent than white parents of the same social class (Conley 1999; Bodovski 2010). In turn, studies suggest that black middle-class parents go to great lengths to secure the best schools for their children (Lareau 2003; Pattillo 2005; Montgomery 2006; Lacy 2007). Part of this process extends beyond academics and entails safeguarding their children from what they deem to be negative peer influences. Middle-class African American parents seek to endow their children with values and cultural norms that embody specific definitions of middle-class respectability and decorum (Pattillo-McCoy 1999; Hardaway and McLoyd 2009; Vincent et al. 2012a; 2012b).

The majority of the aforementioned studies have examined African American middle-class families in metropolitan areas with populations exceeding two million residents. In such places, despite continuing residential segregation, these African American families possess a limited but reasonable assortment of school options should they be skeptical about the quality of their neighborhood school. These include private schools, public magnet schools, charter schools, and suburban public schools. As such, those studies are not limited to families who have remained solely in public schools, particularly public schools in a central city. This study, in contrast, focuses only on middle-class parents who live in a central city and

whose children are in public schools. This paper explores parents' motivations, constraints, and opportunities regarding school selection and the processes middle-class African American parents undertake to ensure their children have high quality and positive educational experiences in a small city of 100,000 people with fewer public school options. Because these parents have forgone suburban communities, this paper also briefly examines residential preferences. Finally, this paper explores some of the school experiences the participants' children have had in a central city district. Data for this study come from in-depth interviews with middle-class African American parents who have children enrolled in the City School District of Albany, NY.

This paper extends the literature on race and education in two ways. First, the findings further illuminate the specific mechanisms concerning how the racial/ethnic characteristics of schools and communities constrain and mediate the school preferences and school experiences of even relatively privileged African American families. Although the parents' relatively high class and educational statuses enabled their children to accrue social and academic benefits, this process did not fully offset racial disadvantage. In this sense, this study further distinguishes the sociological concepts of empowerment and agency (Pattillo 2015). Second, this paper extends the literature on intergenerational processes surrounding schools and education. Despite their children attending schools with an array of academic and behavioral problems, the participants' own positive experiences in public schools helped reassure parents that their children would acquire the necessary knowledge and skills to forge them into successful adults. This paper argues that parents' strong emotional connection to their own

schooling as children is a part of intergenerational education transmission (Currie and Moretti 2003).

The Contemporary Black Middle-Class and Education

Relatively few studies have specifically focused on the educational choices and experiences of African American middle-class families in urban public schools and how they make sense of their circumstances. The majority of studies have centered on the experiences and constrained choices of the black poor (Kozol 1995; Grant 2009; Anyon 2014; Pattillo, DeLale-O'Connor, and Butts 2014; Rhodes and DeLuca 2014; Pattillo 2015). New research, however, has illuminated the black middle-class's experiences in K-12 schools. Concerned with status reproduction—like middle-class families from other backgrounds—they endeavor to find the best opportunities available for their children. For many, their neighborhood school is deemed deficient. For example, Montgomery (2006) noted the dynamic school choice patterns among black middle-class families in Los Angeles. Such families residing in low-income neighborhoods overwhelmingly bussed their children to public or private schools in middle-class neighborhoods. For families who resided in middle-class neighborhoods, one-half avoided their assigned schools and found schools situated in wealthier neighborhoods. Finally, despite their neighborhood schools holding the highest academic rankings, those who lived in affluent areas were the most likely of all groups to opt for private education.

Further research suggests that African American middle-class families utilize magnet and charter schools if faced with the prospect of their children having to attend low-ranking public schools

(Henig 1996; Carnoy et al. 2005; Bifulco, Ladd, and Ross 2009; Smrekar 2009a; Wells 2009; Haynes, Phillips, and Goldring 2010). For example, to avoid high-poverty public schools, magnets were popular among residents in Montgomery County, Maryland (Henig 1996) and in Nashville, Tennessee (Smrekar 2009b). Meanwhile, Lacy's (2007) research in Prince George's County, Maryland documents that even in near-affluent communities, many African American parents opt for magnets or private academies out of the sense that their neighborhood schools fail to provide an environment of academic excellence. This was analogous to the parents Pattillo-McCoy (1999) studied in Chicago who were attuned to college preparation and chose schools that had excellent track records of placing graduates in elite colleges.

In contrast, in Lacy's (2007) examination of near-affluent African American families residing in a predominately white, middle-class suburb in Virginia, parents tended to *remain* in their neighborhood public schools. This choice, however, did not mean that parents were unequivocally satisfied with their schools. Parents felt their children's teachers held lower expectations of black students and steered them towards less rigorous courses.

The ubiquity of low teacher expectations for students of color tends to be among the most consistent findings on studies on race and schools (Pattillo-McCoy 1999; Grant 2009; Vincent et al. 2012a; 2012b; Davis and Welcher 2013; Vincent et al. 2013; Pattillo 2015). African American parents recognized that despite living in regions with first-class public schools, the racialized conceptions teachers held of their children forced them to proactively advocate for them (Lacy 2007). Such social dynamics have also been observed among middle-class

black students in British schools. Parents learned their middle-class statuses failed to shield their children from negative stereotypes associated with the black poor. Race, in effect, eclipsed class (Gillborn et al. 2012; Vincent et al. 2012a; 2012b; Vincent et al. 2013).

In comparison to their white peers, the schools middle-class African American children attend are far more likely to consist of student bodies with populations at or below the poverty line (Pattillo-McCoy 1999; Davis and Welcher 2013). For example, nearly eighty percent of black middle-class households in Chicago in the 1990s lived within four blocks of census tracts in which more than one-third of the population lived in poverty (Pattillo-McCoy 1999). Because of protracted racial segregation that further concentrates black poverty (Friedman and Rosenbaum 2007; Freeman 2008), middle-class African Americans are far more likely than whites with similar incomes to live in high poverty neighborhoods.

Middle-class African American parents concerned with class reproduction take steps to insulate their children from negative peer influences they associate with lower-income African American students (Pattillo-McCoy 1999; Lacy 2007). In Lacy's research, parents limited their children's associations with working-class and low-income black children who lived in adjacent subdivisions. They feared their children would pick up bad habits including non-mainstream speech patterns. Similarly, parents in Pattillo-McCoy's study (1999) feared their children would engage in rebellious behaviors through interactions with teenagers with assumed gang affiliations or children from families that held a limited sense of middle-class values.

Despite having distinct histories and unique cultural frameworks, analogous findings were found among black middle-class families in Britain. Parents diligently worked to maintain and foster relationships with other professional black families who could reinforce positive examples of middle-class respectability. They simultaneously discouraged dress, vernacular, accents, and behaviors they deemed as "street" (Vincent et al. 2012a). Furthermore, parents enrolled their children in arts and music programs as opposed to merely athletics (Gillborn et al. 2012; Vincent et al. 2012a; 2012b; Vincent et al. 2013).

Notwithstanding these findings, gaps in the literature remain. Lacy's (2007) sample consisted of suburban, upper-middle-class families, many of whom enrolled their children in private schools. Relatedly, a large proportion of families in Pattillo-McCoy's (1999) study also chose private schools. Numerous parents in the British studies likewise opted for private academies (Gillborn et al. 2012; Vincent et al. 2012a; 2012b; Vincent et al. 2013). To bypass high poverty neighborhood schools, Henig (1996) and Smrekar (2009b) observed that middle-class African American parents in larger metropolitan areas chose public magnet schools. This study seeks to build on the existing literature by exploring the choices of African American middle-class parents in an urban district with limited options, including having only one public high school and no post-elementary-level magnet schools. Although charter and private high school options exist, the parents in this study have mostly refrained from these schools in the past, and only one currently had a child in a private school. Moreover, they have chosen to remain urban dwellers rather than moving to suburban areas in which the public schools have higher state exam scores and graduation rates (New York State Department of Education 2017).

Case, Methodology, and Sample

This study was based in Albany, New York, a city of roughly 100,000 residents with a metropolitan population approaching 900,000. Albany is approximately 57 percent white, 29 percent black/African American, and 14 percent “other,” with Hispanics being the majority of that proportion (Bureau of the U.S. Census 2017). The public school population does not reflect that of the city. White students comprised just 20 percent of district enrollment for the 2015-2016 school year. At 50 percent, African American students are the largest group. Hispanic and Asian students comprise the fastest growing populations at 16 and 9 percent, respectively. Students at or below the poverty line and students who qualify for free or reduced-price meals stand at 29.4 percent and 60 percent of the student body, respectively (New York State Department of Education 2017). The district operates twelve elementary schools, three of which are magnet schools, three middle schools (no magnets), and one high school.

Substantial challenges face the district. During the time of data collection in 2015, three of Albany’s public schools had been placed under state receivership because of continual subpar academic performance. When the New York State Department of Education places schools under receivership, it typically appoints the superintendent to take control of the school and usher in significant changes, including lengthening the school day, hiring additional teachers and support staff, and instituting new programs.

Unlike other studies of the black middle class that focus on families who live in low poverty, suburban areas (Lacy 2007), this study’s setting of a central city is theoretically relevant. African Americans, even those who are middle-class, are far more likely

than whites to live in neighborhoods with high levels of poverty (Sampson 2012). Indeed, for African Americans born between 1985 to 2000, 66 percent live in neighborhoods with poverty rates exceeding 20 percent. Moreover, 35 percent of African Americans in this age range live in neighborhoods with more than 30 percent of the population in poverty (Sharkey 2013). The setting of Albany, a city with a poverty rate of 25.6 percent (Bureau of the U.S. Census 2017), better reflects the environments that middle-class African American families actually live in (Capital District Regional Planning Commission 2015a).

The data in this study come from in-depth interviews with nineteen parents from eighteen households. The interviews occurred between December 2014 and October 2015. This paper is based on a larger project in which I interviewed forty-four parents from forty-two households. This subsample consists only of the African American participants from the larger sample. Mothers made up most of the parents interviewed. Fathers made up only two of the nineteen parents. I drew three participants from my social networks, ten through snowball methods, and recruited six participants at school board meetings and school open houses. The participants’ names are pseudonyms. The names of the schools their children attended were altered except for Albany High School, which is the city’s only public high school. I have no children in and no affiliations with the public schools in Albany, NY. Participants had to have more than a high school diploma and incomes between \$47,700 and \$250,000 to qualify for the study. The first figure represented 200 percent of the poverty line for a family of four in 2014 (U.S. Department of Health and Human Services 2014). Household incomes ranged from \$48,500 to \$185,000 with the median being just over \$100,000.

Table 1. Social Characteristics of the Sample

Characteristic	No. of Households and Percentage
Median Household Income	\$102,730
\$47,700 to \$60,000	4 (22.2)
\$60,001 to \$90,000	6 (33.3)
\$90,001 to 150,000	6 (33.3)
\$150,001 and over	2 (11.1)
Education (highest degree earned)	
Graduate degree	10 (58.8)
Bachelor's degree	6 (29.4)
Associate's degree	2 (11.8)

Source: Self-elaboration.

The interviews were conducted by myself and three undergraduate students. I identify as a white male, while one student is an African American female, the second a white female, and the third a multi-racial male. We interviewed participants in their homes, at coffee shops, and in my campus office. We recorded demographic information from each participant before beginning the formal interview. The interview questions were designed to create a free-flowing conversation and take about one hour. Meetings with participants, however, ranged from 45 minutes to two hours. All of the interviews were audio-recorded and transcribed verbatim. In addition to parent interviews, I also interviewed three members of the district's school board in order to better understand the important issues facing the district.

The qualitative method of in-depth interviews is an appropriate approach to the examination of the paper's research focus. Qualitative methods, including open-ended interview questions, allow participants to express their own feelings, emotions, and experiences surrounding the topic being explored (Hatch 2002). Participants were given broad latitude to discuss personal stories regarding education and the school choices and experiences pertaining to their children. We began the interviews by asking questions like, "How long have you lived in Albany?" "What led you to live in Albany?" "What has been the impression of the schools your children attend?" "What factors have influenced your school choices?" "How have your children's experiences been in school?" "What do you like or dislike about the schools your children attend?" "How have the teachers been in your children's schools?" These initial questions sparked a conversation which led to follow-up, probing, and clarifying questions.

This study uses a grounded theory approach in which a theory is established from the data themselves (Glaser and Straus 1967; Charmaz 2014). In contrast to testing rooted in a priori hypotheses and assumptions, grounded theorists attempt to understand reality from their participants' viewpoints, devising the questions and concepts to fit with what they encounter throughout the process of data collection. Derived from the inductive reading of the interview transcripts, after uploading each transcript in ATLAS.ti, I performed line by line manual coding in order to deeply engage with the data. My student assistants did not assist with the coding. The line by line coding resulted in numerous initial codes from the data fragments. These initial codes emerged from key words in contexts, striking or telling moments that provided insight, and common descriptions made by participants. Initial

coding was performed after five transcribed interviews. After conducting and transcribing all of the interviews, I went back to the first transcriptions to reanalyze the data in order to evaluate whether or not codes that emerged in later interviews were also visible in the earlier ones.

After initial coding, I performed more focused coding to make sharper analytical sense of the participants' stories and statements. From this, I derived more abstract and analytical categories. These included participants' desire for inclusion and a sense of belonging in both their wider communities and in their children's schools, hopes that their children would experience exposure to the broader social world, aspirations for college, and apprehension regarding continual societal constraints, especially those regarding race.

From the analytical categories emerges the larger conceptual framework I use for this study. I did not begin the study using the framework. Rather, it materialized from the data. I use the theoretical framework of empowerment and agency to organize the findings and analysis of the paper. Concerning school choice, empowerment can be defined as the ability of parents to make informed decisions and realize their goals. For example, are parents able to escape or opt-out of mediocre or violent schools? Yet, empowerment goes beyond the mere execution of choice. Empowerment also entails agency (Pattillo 2015). Agency can be understood as "individuals' ability to act independently of social or structural constraints" (Campbell 2009:416). For example, are parents able to act without capitulation to or having to recognize larger institutional, societal, and economic forces, including institutionalized segregation? Agency better resembles "power over" a specific circumstance. Do these parents have power

over or any real effect on the structural conditions of communities and schools? I argue that these middle-class African American parents possess more narrow forms of empowerment. Indeed, most parents have been able to successfully manage their children's educational experiences, enabling them to enjoy the best of what Albany's schools offer. Nonetheless, acquiring broader forms of empowerment, including agency, has been more elusive. These parents have felt compelled to remain in a below-average school system in a city with relatively high levels of poverty. This has resulted partially from a real and perceived sense of exclusion in other communities and spaces.

Findings: Empowerment in Residence and Schools

Despite the district's challenges the parents in this study all decided to remain in the city and overwhelmingly keep their children in public schools. In the first few sections of the findings, I focus on the empowerment these parents possessed in relation to residential location and school choice, including the empowerment that emerged through their own experiences in public schools as former students. In the latter part of the findings, however, I argue that despite the empowerment these middle-class African Americans do hold, agency, or "power over" a social condition is much harder to attain. To begin, however, I focus briefly on residential preferences in that residence largely determines which public schools are accessible to families.

Sixteen of the nineteen participants preferred the city over the suburbs. Only three desired to live outside of the city, but at this point, they had not felt compelled enough to move. Most enjoyed the conveniences and amenities associated with city life.

This comment from Diane is representative of the broader sentiments of parents. Diane, an attorney with two children at Albany High explains, “I like the city neighborhoods...I like being able to walk to places. You can walk to the library, great restaurants, the park, and even the school.”

Later in the paper, however, I discuss that city living was not purely a preference that attracted parents to the city, but that other factors were salient in dissuading them from living in outlying areas. Therefore, most parents’ decision-making processes were complex and emotion-laden.

Table 2. Participant Household’s Neighborhoods in Albany and Demographic Results by Neighborhood

Neighborhood	No. of Households	Median HI	White	Black	Hispanic	Asian
Olympus	1	68,977	88.2	11.8	-	-
Pinewood	1	95,733	84.2	9.6	2.6	0.9
Arcadia	2	60,978	77	13.2	5.5	4.3
Irving Park	1	41,875	73	15	3	6.7
Crescent	1	71,333	71.1	16.5	5.6	5.3
Hollywood	3	90,037	68.5	30.8	-	-
Mountain View	2	53,713	55	33.5	2	-
Charleston	2	32,750	48.1	21.3	11.3	17.8
Erie	1	39,145	19.1	62.8	12.8	2.4
Beverly	4	19,653	3.5	78.1	17.5	-

Source: Bureau of the U.S. Census (2017).

Similarly, although complex factors regarding race, community and school inclusion, and personal histories within the public schools weighed heavily into the decisions parents made about schools, most parents also sought the highest quality school options available in the district, and they were quite successful at obtaining these. Like the families studied by Henig (1996) and Smrekar (2009a), many of the parents in this study sought magnet schools during the elementary years or specialized programs that

operated within conventional public schools. Indeed, six of the eight families who resided in neighborhoods with median household incomes below \$50,000 did this. Compared to their assigned school, by seeking magnets and specialized programs, their children would attend schools with higher state test scores and a larger white student body. This pattern held for parents who lived in neighborhoods with incomes of \$50,000 or more in which six of ten sent their children to magnet schools. Their neighbor-

hood elementary schools also had higher percentages of white students than the elementary schools in neighborhoods with incomes below \$50,000.

However, even for parents who chose magnet schools over their assigned schools, some had to

engage in substantial advocacy and intervention on behalf of their children for them to obtain the type of education that met their needs and served their abilities. These parents, nonetheless, noted they were mostly successful in these efforts, which speaks of some measure of empowerment.

Table 3. Demographic Characteristic of Schools Attended by Participants' Children in comparison to Assigned Schools

District School (Chosen)	Test Scores Percent Proficient Math English		Percent Non-White	Percent Free/Reduced Lunch
Albany High School	10	54	80	55
Middle Schools				
Lincoln	14	29	75	57
Fordham	13	22	82	61
Elementary/Magnets				
Hillgrove	42	48	43	27
Clayton	20	19	83	48
Elementary/Neighborhood				
Providence	38	36	50	40
Brookline	22	23	62	52
Maple Ridge*	15	16	75	59
District School (Assigned-Avoided)				
Prospect	11	9	94	78
Ten Broeck	7	8	96	80
Kendall	10	16	94	79

Source: New York State Department of Education (2017).

*Housed the language immersion program.

Victoria is representative of the families who lived in neighborhoods with incomes below \$50,000 and avoided their assigned school. Victoria, an attorney, has two sons and a daughter. One of her sons is in middle school while the other is in high school. Her daughter attends a magnet elementary school. Although Victoria earns a high income, she lives in an impoverished neighborhood near downtown because she inherited a home there. She speaks of her daughter's assigned school, Prospect, as being unacceptable.

It just doesn't seem to be up to the standard that any school should be. The school itself, my daughter took singing lessons there. And they would meet there, and the school itself is in disarray, the kids seemed to be. I feel like it focuses a lot more on discipline than actual learning. So, no, I wouldn't have sent my kids there.

In addition to having lower state test scores, Prospect is overwhelmingly African American, with less racial diversity than the magnet school, Hillgrove, she chose for her daughter. All of her children, in fact, have gone through Hillgrove Magnet. She speaks highly of the school which operates on a lottery system.

I absolutely love it...We also realized the teachers were great, that academically [the kids] were doing well, so we were just very, very happy with it. So, once [my first son] went through, we sent our [younger] son who is fourteen, and then my daughter also came in as a sibling, because they have sibling preference. So, I just love it. I've had no complaints academically. They know us. They know my daughter. They seem to genuinely care about the students.

Victoria admits that she did scant research on schools. That task largely went to her ex-husband,

the children's father. She notes, "He initiated everything because he did his research about it. He knows a lot of details, and so I just followed through with getting them into Hillgrove."

Wade and Kayla live in a working-class neighborhood, work in local government, and have two daughters who also currently attend Hillgrove. Like Victoria, they were not impressed with their neighborhood school, Brookline, and applied for Hillgrove. They were unable to get into Hillgrove initially. Kayla explains, "we signed up for Brookline because, like I said, we didn't get into the program at Hillgrove. We were in line like everyone else." The following year, however, they were able to enroll at Hillgrove. Then through sibling priority, both of their girls, Grace and Emma, gained entrance. Even though Wade and Kayla had sought out Hillgrove, the school disappointed them until they intervened with teachers and staff. When asked about their impressions of Hillgrove, Kayla and Wade replied:

Kayla: Generally good but mixed...Both our girls test above grade level...So the challenge was making sure the teachers were challenging them—not just giving them more work.

Wade: More work is not the point.

K: Grace had a fabulous kindergarten experience, but first and second grade, we weren't real...

W: I was horrified at first.

K: We were very upset in first grade. As I went to the open house—the regular teacher wasn't there—but a sub was...I told them, "You know, [our daughter] has been upset, she's, you know, because she's bored. What can you do to challenge her?" And [the teacher] says, "Well, we don't really see what you're saying. Once she starts finishing every reading in class, then I give her more to do." And I was like, "I don't think

it works that way.” Then I waited and talked to the Gen Ed teacher, and I still wasn’t happy. But, [the teacher] did get her some books in their library.

Interviewer: So, you want, it would be nice for more challenging readings?

K: And math. She scored really high in math.

W: She’s one to two years ahead of grade level.

K: So, she’s always loved it, very bright in math and reading, but math is her strength and enjoyment, and so my frustration was that she was still sitting through lessons that, things that she could pick up in a day.

I: So, the main thing at Hillgrove was just the lack of rigor?

K: With *some* of the teachers. Our younger daughter, Emma, she was reading *Harry Potter* because Grace was reading too, but Emma’s teacher didn’t believe us. But, we got her teacher to agree to sit down with Emma to see if she really could read *Harry Potter*, and she’s like, “Yeah, she can read it, and she’s understanding it.”

K: So, she did great. She would pair up with another girl in her class that was at the same speed as Emma, and [the teacher] would give us some projects based around the books they were reading instead of the general books everybody else was reading.

In contrast to the trend of parents leaving Albany once their children reached school age (Correia 2015), Sandra and her husband recently had done the opposite and moved from suburban Colonie to the city. They have four children, three of whom were in elementary school at the time of the interview.

I: What led you to move to Albany from Colonie?

Sandra: Well, we have our own business in Albany, and we just, I honestly just wanted to be able to serve the community...So, I, my husband and I thought

a lot about it and talked a lot about it and we decided to move here, and we have a lot of friends here, a lot of people who are in the community and have been rooting for us to move.

I: As far as the schools, were the schools you chose the ones you had wanted?

S: Yes, actually, out of the public schools in Albany those were my choices. Those, well, my son originally...he’s a sixth-grader, and he goes to Hillgrove. He had started at Providence, but we moved him to Hillgrove, and it wound up being a very good experience for him so far. The girls are still at Providence.

I: Why did you move him to Hillgrove?

S: There are different things. I think there needs to be more awareness of the kids. They don’t really know where my kids are right now academically and things like that. And so that’s the big issue. For example, I have two girls there; so my daughters are in third and first. My first grader is an advanced student that can read at about the same level as where her sister is. So, I really wanted to make sure she was challenged...but, at this point, no one really, it doesn’t feel like they recognize...I don’t want to be the parent—“My kid this, my kid that”—I wanted [the teachers] to just naturally kind of grasp what she’s got and what she knows. But, after we’ve brought this up, I’ve seen that kind of shift. It’s getting better.

Overall, families with children at the elementary level were successful in securing slots in the city’s most desirable schools, which, in most cases, were the magnets. Still, some parents were not that happy with the schools until they intervened. Their dissatisfaction was tied to the lack of academic rigor of some of their children’s classes. They felt highly of their children and demanded that teachers accommodate and better cultivate their children’s talents. Sandra noted she did not want to be one of *those parents* who constantly expected special

attention for their children, yet “fostering the love of reading” in her daughters was very important. The findings explored here support previous research (Crozier, Reay, and James 2011), which suggests that middle-class parents think very highly of their children and feel that they deserve the best of what schools offer.

Parental Choices and Empowerment in the Post-Elementary Years

Even with 100,000 residents, Albany has only one public high school and three public middle schools. There are no magnet schools at these levels. What the district does offer, however, are honors courses in middle school and Advanced Placement (AP) and International Baccalaureate (IB) coursework in high school. Parents overwhelmingly sought these programs and were quite satisfied with them. Although the AP and IB programs do not require an entrance exam and in theory are open to all children, the district places gatekeepers around their enrollment. The district recommends that students speak with their current teacher about the programs, an instructor who teaches courses in honors, AP or IB, and their school counselor. Parents are also encouraged to do all three things. Teachers and school staff subsequently decide if a student is prepared to handle the program (City School District of Albany 2017). All three of these “requirements” necessitate good communication skills, as well as confidence on the part of the student. Parents must also be involved, have the proper information, and meet with teachers and staff. The entire process, therefore, can potentially exclude students from households with limited parental guidance or awareness surrounding specific educational opportunities, and indeed, substantial academic segregation exists after the elementary

level in Albany’s schools (Interview with Albany City School District Board Member 2015).

These limitations, however, did not affect the parents in this study who possessed the know-how to obtain the best programs and classes for their children. This, however, did not mean it was an easy or automatic process for all parents. Some had to intervene in order for their children to be placed in advanced classes or at least classrooms with better teachers. Furthermore, one parent noted her immense effort required to obtain the support that her daughter, as a high-functioning special education student, needed in order to be successful in the honors-level classes.

Morgan, a state government worker with three children, discusses her son’s experiences at Lincoln Middle School. Morgan has been successful in advocating for her son to be in all honors-level classes.

I: What’s been your experience with your kids at Lincoln?

M: Oh, I love Lincoln.

I: What are some of the things you like about it?

M: Well...if there’s something I don’t like, they kind of compromise. Like, right now, [my son] has got all honors classes except one class, the math class, but that’s changing. I don’t understand with a 99 average how’s that? And [the teacher’s] reason was that, ‘Well, he’s a very smart kid, but I think that with all the other classes...” So, I said, “Well, whose decision is that? Wouldn’t that be my decision?”...So, after my reasoning, voicing my opinions, and my statement... the teacher changed him into advanced algebra.

Carla, who works in journalism, has a son in middle school. Although she supports the district, she

notes that it only works if parents are heavily involved and advocate for their children. Cole, her son, has been at Lincoln and was struggling until Carla intervened.

Cole is stressed about fights. He's smart, but he's shy, quiet. He needs individual attention. His grades were starting to slip; not bad, but not great either. But, I would go into Lincoln to meet with Cole's counselor and they said, "Oh, he's great" and that's it. Like, they're not on top of it. But, as an involved, vocal, parent, I made it give Cole the best that it could. So, it's a matter of, you know, if you get a good counselor. I had to go in and get him into the class with the good math teacher. We were able to get him an excellent art teacher that took to him and loved him...He became more engaged. So, I think Lincoln is only as good as it services the individual. As a whole, no, it's not good. But, it really can do wonders for someone, you know, but I think you really have to fight for it.

Finally, Monica has had a very similar experience as Carla with the city schools. Monica and her husband both work in law, but she recently quit her job to provide more attention to their younger daughter who has special needs. They had explored private schools, but found the education to be better in Albany's public schools as long as children got their needs met and entered into the honors/advanced programs. Monica explains:

M: I'm a unique parent. I have two daughters who are very different learners. And our daughter who is at Lincoln is in special education. If I was not dedicating a lot of hours, a lot of time, and a lot of research, my daughter would get a subpar education. But, I am a very big advocate, because I'm educated, because I take the time to learn my daughter's

doing okay, with all of the support. But, I have to fight for everything I get...Our younger daughter has a chronic medical condition...Suffice to say, it's progressive. It's really important that she get the support that is legally entitled to her. She has a one-on-one para-professional who's fantastic...She is getting resource room time. And she gets that for reading, writing, and math...Teachers are wonderful, but they're not used to working as a team, and when you have an IEP, and it needs to be followed, and it requires a team approach, that's a problem for the school.

I: So, you've had to continuously advocate then, and it's a constant thing?

M: But, I get results. It's one reason I'm not working outside the home, because this takes up so much time. I have to learn how to read studies; I have to learn everything. So, because the district will not tell you; the district will not provide. They don't volunteer anything. So, I have to constantly be vigilant.

I: And your daughter's classes then, it is kind of some special classes...and some where she's mixed with others?

M: She is actually an honors student, and she takes honors classes. So, she doesn't fit the mold of what a special ed student is. She's severely dyslexic...She gets resource room time twice a day, but she's in honors classes and she's doing well, but she has support.

Monica and her husband explored private schools for their oldest daughter (the non-special needs daughter), but they did not come away impressed.

My older daughter is super accomplished. She would do well anywhere she went, but we did consider private school for her. You know, we were looking at Middleton Academy, but they are so regimented with their curriculum, and we weren't that impressed... My daughter didn't want to go; she wanted to go to

Albany High...At Albany High as a ninth-grader, she is taking AP World History, AP Chemistry, AP Chinese. You cannot get that at Middleton.

On the whole, the parents in this study were quite successful in leveraging their power to make the public schools work for their children. For some, this resulted in being placed into honors programs, switching classrooms in order to be taught by better teachers, and acquiring the educational services their children needed. Parents noted that Albany public schools were relatively good as long as parents were heavily involved in directing attention and resources to their children. Relatedly, of all the parents who had children in middle or high school, only one did not have their child in any honors or an honors-type program (AP and IB). This parent, Josie, an attorney, explained that her son was not at the level of an honors student and, therefore, placed him in a private school so that he could receive the attention he needed. She notes, "We didn't think our oldest son would focus enough to stay and do what he needed to do. He'll get more structure at St. Mary's." The instances like Josie's illustrate a measure of efficacy and empowerment. Overall, whereas a substantial percentage of parents in Patti-tillo-McCoy's study (1999) on middle-class African American families utilized private schools, parents in this study with concerns about academic quality were largely assuaged by academic segregation (in the form of honors, AP, and IB) at the classroom level and by successfully directing school resources to their children.

Intergenerational Education Transmission and Empowerment

Although most parents noted that magnet schools, specialized programs, honors-level classes, and

their successful advocacy for their children kept them in the district, their own positive experiences and outcomes as students in urban public schools also played a role in influencing their views on schools. Their personal histories assisted in creating intergenerational expectations that their children would excel in public schools. Moreover, three parents had actually attended Albany's public schools. These experiential factors endowed greater confidence that their children would do well within the district despite its array of problems. This endowment of confidence can also be understood as a component of the empowerment these parents possessed. One such parent was Morgan. Her legacy as an alumna of the district informs her outlook on her children's education in the city's schools.

I graduated from Albany High School, and I was in my top, top of the class. I can tell you the principal had an open-door policy, and so did Gerald Jennings as the assistant principal¹...They, the guidance counselors, have open-door policy, and they will call you, you know, with whatever's going on...Albany High also allowed you to be who you are. It's one of the schools that I remember that you could be pregnant. I remember in Guilderland High School, that was like a no-no back in the days. But, at Albany High, if you were pregnant, you still were able to go to school. In suburbia, you're shunned. But, in general, Albany High, they want to be known as the best, and they keep working at it. There's so much pressure on them to do better—from the state, the mayor, all of that, and so my kids will be fine there.

Kari had a similar, positive experience in the city's school district.

¹ Jennings would become mayor of Albany from 1989 to 2013.

I know everything about it because I grew up in the projects, and the only thing about it that was different for my sister and I is that in fourth grade the school district had this program for academically-talented students, and I was in that. So, fourth through eighth grade, they tracked us in this program. I remember that it exposed me to a lot of things that I would've never been exposed to had I been in the average classes...The honors kids were a very mixed group—like half the class were white and half the class were black. So, those became our friends. So, we had birthday parties; they'd invite us. So, we'd go to South Main—nice houses—and I was like, "Wow, backyards! Fathers!" And my dad wasn't around, so I was like, wow, maybe I can...maybe my kids can have a father...So yes, my daughter is going to Albany High.

Even for parents who had not gone through the city's public schools, their own positive experience with public education influenced their school decisions. Verona grew up in a public school system in the South and excelled, as did a large part of her extended family. When asked what influenced her views towards public education, she responded with accounts of her own experiences and those of her relatives.

I went to integrated schools. Kids who were a year or two older went to segregated schools and the same schools that my mother went to and her siblings went to. And we knew that they were not getting what they needed, but there was a community built around their school. Then integration occurred, and so the public school became for everybody. I really think I went through what I would probably call a public school that was a great, great college-prep type school...That's where [my views] come from.

Verona's discussion on the school experiences of relatives and other community members that predated integration aligns with the literature on African American community schools. Prior to federally-mandated desegregation, faced with outright exclusion in white schools, many African American communities organized their own community-based schools (Stulberg 2004; Grant 2009). Most were parent-led. Despite the lack of financial resources and state support, these all-black schools offered African American children a sense of pride, group history, and cultural awareness that strengthened their self-esteem. Verona continues her discussion:

I had grandparents, great grandparents that were not—I think my grandfather went as far as the sixth grade. But, they had eleven children, and out of the eleven, I have four military uncles. One was a four-star general. I have another who was a former Vice Provost of [a major university]. So, everyone—and my cousins were lawyers and dentists and educators—and so I grew up with that. And my family started with people who were railroad men, butlers like Douglas Fairbanks. But, basically, the message was, "go and get yours"; "get your degree"; "school is important"; and I believe in that. And it happened to be the public education system I was in; it worked for me and worked for my family.

The quotes from Verona, Kari, and Morgan underscore the importance of intergenerational transmission of educational values that influenced the schools they selected for their own children. The parents in this study largely had positive experiences in public schools. Their confidence in public schools is salient given that African Americans have never fully trusted the public sector to meet their children's academic needs (Stulberg 2004). Public education for black communities has often come

with low teacher expectations, teacher labeling, substandard facilities, racially-motivated stereotypes, unfair disciplinary actions, and a lack of safe environments (Grant 2009).

Although additional factors were important in determining school selection, participants' own positive experiences within public schools provided a strong emotional pull towards public education. The specific public schools they attended all provided them with important opportunities and resources that affected their life chances. For Kari, her time in public schools granted her access to new forms of social, as well as cultural capital. Social capital can be defined as social network assets that foster assistance and reciprocity and create opportunities to enhance outcomes for an individual, group, or community (Coleman 1988). Cultural capital consists of "knowledges" and credentials that are highly valued in society, particularly by people who have greater levels of authority and influence. Individuals with higher levels of cultural capital possess more power (Bourdieu 1984; Bourdieu and Passeron 1990). Overall, parents' own positive experiences in public schools endowed them with a sense of efficacy and confidence that their children would also excel in public schools.

Lack of Agency

Anxieties Concerning Suburban Communities and Suburban Schools

The paper now turns to explore how issues surrounding race continue to limit parents' empowerment, illustrating a lack of agency, or the ability for these families "to act independently of larger social and structural constraints" (Campbell 2009:416). Lack of agency was reflected in the narrow range of communities and schools in which most parents felt comfortable. Although not a formal form of exclusion, the participants could not act independently of the social or structural constraints concerning communities and schools. They had to deliberate upon racial integration, inclusion, and acceptance, and felt compelled to avoid spaces that lacked these qualities. For example, although most participants enjoyed city life, they also noted factors that dissuaded them from living in Albany's predominantly white suburbs. Most had never lived in suburbs and felt they could not move there because of their nearly all-white population as shown in Table 4. They sensed that in comparison to their relatively integrated city neighborhoods, they would stick out and be treated unfairly in suburban areas.

Table 4. Demographic Characteristics of Municipalities in Albany County

Municipality-City	\$ Median HH Income	Poverty Rate	% White	H.S. Graduation Rate (4 years)
Albany	42,335	25.6	57.01	60
Municipality-Suburb				
Bethlehem	92,708	4.5	91.9	94
Guilderland	76,955	5.6	86.2	93
Colonie	72,135	6.6	85.2	91

Source: Capital District Regional Planning Commission (2015b).

Cindy works as a business manager at a local firm. She and her ex-husband have two children, one in middle school and the other in elementary school. She explained that she would not feel comfortable in Albany's suburbs. Their city neighborhood is by comparison 73 percent white.

When we first started looking for a home, it was a struggle because my husband—even though he was African American—he grew up military and had a very different African American experience. And he wanted to consider Bethlehem [a popular suburb], and I just, I didn't want to be the only ones [who were black there]. I was always, you know, urban. I grew up urban. So, this was what I was comfortable with.

Nick and Geneva are state government employees and have two children in elementary school. The couple said they would be wary of moving to an actual suburb. Their city neighborhood is 71.1 percent white.

We were actually talking about this issue this past weekend. And we were like, in Bethlehem the kids would probably have to deal with some race issues there, you know, even though they have a lighter complexion. But, with their hair and all the stereotypes, they'd probably have their own set of issues. Somebody gets upset with them or jealous of them enough where they'll call them a name just to bring them down...We don't feel like our children would be treated equal to everyone else, including by the teachers. It's unfair. It's unfortunate, but it's the way life is.

Kari and her husband have three children, own a small consulting business, and live in a neighborhood that is 68.5 percent white. She said they neither considered the suburbs when they bought their house a few years ago, nor would they now. She de-

scribes the first time she had to travel to a meeting in an outlying area of Albany.

Oh, Selkirk, Ravena, Niskayuna...oh, down there in the woods like that, oh, man! So, it's so funny because [my business partner and I] had all these reservations about going to these different areas for meetings. It's so funny because she said, "Oh, I'll bring my husband with me," and I'm saying, "Oh, me too!" [laughing]. Because I'm going to a rural area, and I'm not comfortable. All I can think about is the South back in the sixties. It's scary. And to other black folk, I'd say, in Albany, you'd be fine, out in the burbs, I don't know.

This unease of suburbia extended to parents who had for a time actually lived in the suburbs, but moved back into the city. They too noted that they felt more comfortable in the city. One of these parents was Kelsey, a registered nurse, and mother of two. Kelsey and her children lived in suburban Saratoga County several years ago, but moved back to Albany when her youngest son was in Pre-K.

When we were outside Saratoga, [my son] was really one of a few children of color. Even when he was in Pre-K. And I grew up like that, and I'm very sensitive to that, and I don't want them to feel...I want them to see people around them that look like them. I don't mean for it to be all one race. I think that's weird too, but it should be diverse...And another thing, both his teacher and the principal at that time, they would always say these strange things when I came in. They meant to be friendly, I think, like saying, "Oh, it's so nice we have a black family here," but it felt weird.

The residential preferences of the parents reflect research suggesting that African Americans prefer racially-integrated neighborhoods (Krysan et al. 2009;

Swaroop and Krysan 2011). The parents also underscore some of the thought and emotional processes they undertake when determining the place in which they wish to reside. Most families felt the city was a better option, a place that provided a stronger sense of belonging. Yet, forgoing a suburban home meant not having access to some of the high-

est-ranking school districts in the entire state. Test scores and graduation rates in every adjacent suburban district far exceeded that of Albany's schools, particularly in Bethlehem (New York State Department of Education 2017). A dynamic of the limited agency is revealed in the narrow parameters of suitable community options for these parents.

Table 5. Characteristics of Neighboring Suburban School Districts

School (Municipality)	Test Scores Percent Proficient Math English		Percent Non- White	Percent Free/Reduced Lunch
High Schools				
Bethlehem Central (Bethlehem)	40	91	11	9
Guilderland (Guilderland)	51	91	19	13
Shaker (Colonie)	45	88	25	14
Middle Schools				
Central (Bethlehem)	66	65	11	8
Farnsworth (Guilderland)	56	46	21	16
Shaker (Colonie)	67	60	26	15
Elementary Schools				
Elsmere (Bethlehem)	72	72	7	13
Glenmont (Bethlehem)	51	59	12	6
Guilderland (Guilderland)	55	62	33	17
Blue Creek (Colonie)	52	38	32	21
Loudonville (Colonie)	79	65	20	5
Southgate (Colonie)	66	62	26	17
Latham Ridge (Colonie)	64	39	28	21
Boght Hills (Colonie)	69	53	32	15
Fort's Ferry (Colonie)	57	48	30	18

Source: New York State Education Department (2017).

A Sense of Exclusion in Private Schools

The lack of belonging parents said they would feel (or felt) in suburban communities and suburban public schools, for many, extended to private schools. Nearly all of the parents believed that the area's best private schools were either too socially isolating for their children or racially segregated, with these being intertwined. The following quotes highlight this. Cindy and her ex-husband have stayed away from private schools, but they have discussed the topic. She first touches on her daughter's middle school, Lincoln, which has a majority of low-income and African American, before discussing private schools.

Lincoln doesn't allow them to view the fact that they're predominately African American and poor to define them...Black people exist. Hispanics exist. They do not, not exist. So, to raise my children in a world that's not representative of that isn't fair. We're not doing that...The private schools are a bubble. I did not want my kid to be one of three [African American students]. My ex-husband was always the only [African American], and I think it did horrible things to him...We had a teacher [at Lincoln] who was always the only one, and when they are the only one, they grow up different. Something happens to them.

Diane and her husband have two children, both at Albany High. Over the years they researched the area's private schools because they felt they needed to be aware of the existing options and opportunities. Despite this, their children have remained in the city's public schools.

I: And so, what was the key factor in remaining in the public schools?

D: I think it was the diversity...all kinds of racial, socio-economic classes, the whole thing, and just the exposure to that. It was just an important part of their learning process and who they are...That to me was really important, and we have had good experiences with the teachers...But, that's...diversity is really important...We thought about the Catholic girl's high school for our daughter, but there's little diversity. She wouldn't even get out of the car if we visited [laughing].

Finally, Brooke and her husband have three children, one at each level of school. Brooke is a manager at a state agency, while her husband works in software. Their two older children had for a time been in private schools in Albany, but they ultimately returned to the public system.

I: So [two of your children] were in private schools. What led you to go back to public schools?

B: I saw when my son and daughter were at Tryon Academy...so again it's about balance. You get a great curriculum, content, but there's something else that you lose [at a private school]. If you're not of the same ilk of the class, you've got that whole thing to deal with. It's harder to make friendships because you're not in the same circuit. I think [the Catholic school] is probably a little bit more diverse, but I don't think they're as academically strong as Tryon. And I found with my son, finishing there, it was a challenge for him to maintain friendships, to feel like he was welcome. Like he was the only black player on the football team. It just wasn't right.

Wells and Crain (1997) examined African American families who participated in an inter-district transfer program that bussed thousands of mostly poor, African American students from St. Louis into predominantly white, middle-class suburban

schools. Although transfer students benefited from more rigorous academic environments and by various forms of capital associated with wealthier, white communities, they felt a sense of alienation from the tacit cultural knowledge shared between white teachers and their suburban white students, as well as social isolation. Urban students were, of course, bussed back to the city at the end of the school day. They, in turn, found it difficult to build friendships in the absence of peer interaction during evenings and weekends.

On the surface, it may appear that these African American middle-class parents possessed many options, including suburban residence, high quality suburban public schools, and private schools. The appearance of options, however, obscured the real structural constraints felt by these families. They were reticent of residing in the heavily white suburbs around Albany and sending their children to the public schools in those communities. In addition, their selection of Albany's public schools was influenced by their apprehension towards the city's private schools. What both of these processes have in common is a continuing level of discomfort, even among comparably privileged African American parents, for overwhelmingly white spaces. It was less that formal barriers existed to prevent families from accessing these spaces, but rather social and symbolic barriers. Parents needed both themselves and their children to feel a sense of welcome and belonging in the schools and in the broader community. Indeed, unlike findings of Wells and Crain (1997) and Lacy (2007), the parents in this study, although not entirely satisfied with the teachers, did not mention that their children's instructors made them feel different or separate due to their race. This was the benefit of being in urban public schools.

Ultimately, for these parents, community and school choice is a complex social-emotional process. Entangled with other, more "objective" factors like test scores are parents' own social, emotional, and non-material concerns regarding race, inclusion, and their personal histories in public schools. This supports previous research suggesting that emotion and rationality are mutually dependent elements in how human beings construct and undertake important life decisions (Gould 2009).

Racially-Segregated Academic Programs

Finally, although parents found much to like in Albany's public schools, including specific academic programs and relative diversity in comparison to alternative sites, the legacy of racial disempowerment and educational exclusion continued to structure social interactions and peer networks in Albany's schools, particularly at the high school level. This reveals a lack of agency. Albany High's strong AP and IB programs, which separate higher-performing students from others in their cohort, also contribute to racial segregation. Honors classes at the middle school level are also segregated, but at more moderated levels (Interview with City School District of Albany Board Member 2015). White students disproportionately populated the advanced classes taken by the children of the parents in this study. Thus, the irony is that whereas parents avoided suburban and private schools due to a lack of racial diversity and inclusion, in the honors, AP and IB classes, African American students were in the minority (Interview with City School District of Albany Board Member 2015). This led to social consequences. Most parents noted that the majority of their children's classmates and school friends were actually white. Shauna describes her son's experiences.

In his honors classes, I would say he has one friend who is black, and dozens who are white [laughs]. And because we live in our neighborhood, he has a lot of friends from around our neighborhood who, one's mom just got out of jail, various sets of circumstances. So, he's not in classes with most of the people in our neighborhood, but he knows them...but most of his closer friends are white kids, like ninety-five percent.

Diane also mentions that her children's friends from school are mainly white. At the same time, however, her children would find it peculiar to be in an all-white environment.

Probably the majority of my kids' friends are white, but I think they're doing okay because they do see other black kids in the non-IB classes, like music. It's okay; it's just how Albany High is designed. I wish it could be different, but I don't know how you get actual academic integration because then the middle class would leave. I mean, I know many people—people tell me this all the time.

Kari's oldest daughter attends Lincoln Middle School and is in honors. She, however, is concerned that her daughter is struggling to find her way in school, partially as a result of her status as a middle-class African American student in a school that is disproportionately black and low-income. Unlike Shauna and Diane's children who are enrolled in AP and IB classes at Albany High, Kari's daughter in middle school has not been able to compensate for the lack of African American friends with white friendships. Kari hopes this will change in high school.

I: How has your daughter's experience been at Lincoln?

K: It started off positive, but then it's gotten more and more negative. She texted me yesterday and said, they're doing Regents review and she doesn't have a partner. No one wants to partner with her... The thing about it is she's not black enough [laughs]. So, she said, "Well, mom, why do I talk like this?" The black kids are like, "Why do you talk like that?" And then she's like, "What? Like what?" She's not like, urban enough. You know?

Prior research suggests that African American college students who come from racially integrated community backgrounds tend to do better socially and academically, but are often unfamiliar with urban black culture and fail to connect with low-income, black college students (Torres and Massey 2012). Based on the experiences of some of the families in this study, even middle-class African American students who reside in urban centers and have wide exposure to lower-income African Americans can still feel relatively isolated from their lower-income peers and certain aspects of this culture. Still, the parents in this study did not appear to be overly concerned that their children's school friendships generally consisted of white students. Neighborhood venues or extra-curricular activities balanced some of their networks with respect to race. Their children were also mostly excelling academically. Nonetheless, even in a relatively diverse school district in which a plurality of students are African American, some students lacked strong peer/friendship networks with other African American students because of academic segregation and social class differences.

Another complex dynamic is that whereas parents' own children benefited academically from classroom segregation, some like Diane held mixed feelings regarding this. But, her sense that

changing Albany High's structure would alienate the city's middle-income families and lead them to leave is documented in the literature (Stillman 2012). Therefore, funding of "gifted and talented" programs is often preserved (Stillman 2012). In Albany, middle-class parents relied on the honors, AP, and IB programs and did not want to see those compromised even if their children were among the few students of color in these classes.

Discussion and Conclusion

This study explored the factors that influenced parents to remain in a central city and enroll their children in public schools. Their choices are a result of both their empowerment, but also their limited agency. Most parents enjoyed Albany and city living, but because most did not feel welcome in either suburban areas or in the city's private schools, these families felt their options were essentially limited to urban living and urban public schools. Because of this, parents were determined to make the city's public schools work for their children. This included enrolling them in the more desirable magnet schools at the elementary level, and ensuring they would be in honors, AP, and IB programs in the post-elementary years. The AP and IB programs were especially relevant given that Albany only has one public high school. This is a unique characteristic with respect to the community context of this study. Accordingly, many parents engaged in substantial advocacy work and intervention so that their children would be instructed by the best teachers, tasked with more challenging projects, and receive the best services available in the district. To that end, unlike the low-income parents examined by Pattiño (2015), these parents possessed some level of empowerment. They used their human capital to

successfully manage the school system to make it serve their children.

Nonetheless, these middle-class African American parents could not fully enjoy the levels of agency held by their white counterparts. Agency can be understood as the ability to operate independently of broader structural constraints and larger institutional forces. The city's best schools still do not measure up academically to public schools in the suburbs. For example, even the city's best public elementary school as measured by test scores, Hillgrove, had lower test scores and higher rates of students living in poverty than the *lowest* ranking suburban elementary school (Blue Creek).

Yet, Albany's suburbs gave them a sense of unease and exclusion. That Albany's suburbs are predominantly white is a product of the legacy of exclusion on the basis of race. Racist policies and practices by the federal government, commercial banks, and real estate actors (Massey and Denton 1993; Friedman and Rosenbaum 2007) helped create a stark racial divide between cities and suburbs. Today, these discriminatory practices continue in different forms (Kuebler 2012). These institutional barriers regarding race, residence, and non-inclusion were too much for most of these parents to overcome.

The perceptions of the families in this study relate to those of Wells and Crain (1997) in that parents feared their children would feel a sense of racial exclusion and isolation if they attended either private or suburban schools. Moreover, in Brooke's children's experience in private schools, this indeed occurred. Therefore, the findings from this study suggest that both a sense of social isolation and exclusion, as well as actual experiences of such can occur not just for low-income African Amer-

ican students who are bussed to mainly white, suburban public schools (Wells and Crain 1997), but also among *highly educated, middle-class* African American families.

This study's findings support previous studies that examine the parental transmission of educational values and outcomes (Currie and Moretti 2003; Spielauer 2004; Patacchini and Zenou 2007). Yet, this study also furthers the literature by suggesting that intergenerational education transmission can be a highly emotional process related to identity construction (Gould 2009). Parents identified strongly with aspects of their schooling that led them to become the people they were today. A handful noted how public education lifted them out of impoverished families. Public education was related to social and racial integration, as well as upward class mobility. These powerful abstract and emotive factors affected their school choice decisions.

Limitations of this study include the small sample size of the parents interviewed and that data were only collected from parents. The similarity of certain findings in this study to previous literature on black middle-class families, however, suggests some level of generalizability. A larger sample, nonetheless, could have included African American parents who left the city or enrolled more of their children in private schools. This would help isolate the factors that are unique to the parents in this study. Furthermore, follow-up interviews with parents, for example, two years after the initial interviews could provide important information regarding school outcomes and add to the validity of the findings. Interviews and other data collection methods with the students themselves would also provide yet another empirical layer to the study.

Although parents with children at the high school level—with the exception of one child—were able to enroll them in advanced programs, they had few African American peers there. Despite the diversity of the district, parents could not overcome considerable classroom academic segregation, a product and legacy of unequal structural conditions between African Americans and whites. Does the absence of having high performing peers of one's own social background harm students? Previous research suggests that high performing African American students are able to successfully incorporate black identity with academic achievement (Horvat and Lewis 2003). Most parents in my study noted that while their children did not have many African American peers in their advanced classes, extracurriculars enabled socialization with black peers. Yet, future research is necessary to better understand these processes. New studies could collect data from students themselves and compare students who are involved in extracurriculars and/or outside community groups with those who are not. Many charter schools and private schools offer fewer extracurriculars in athletics, music, and theater (Ravitch 2014). These dynamics could impact students. Budget cuts due to the economic mismanagement of the COVID-19 pandemic could also upend school budgets and place both extracurriculars and honors programs at risk (Cohen 2020). These forces have hit communities of color the hardest (Cohen 2020). There is going to be a need for substantial new research on the educational consequences of the pandemic-induced crisis.

Finally, the academic segregation of the children of these parents experienced points to the continuing reproduction of educational stratification (Collins 2009). Although the separation of high performing African American students in honors classes forg-

es social bonds with academically talented students from different racial and ethnic backgrounds, it also separates them from lower-performing students of color. This speaks to the loss of social and cultural capital among disadvantaged African Americans (Wilson 1987). If middle-class African American students are educated in separate classrooms and, in

turn, develop peer networks primarily with other, more disadvantaged students, the capital that poor and working-class African American students can accrue is substantially diminished. Research should continue to examine the institutional practices that uphold these stratified outcomes and seek out policies and programs that will reverse such forces.

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Life Strategies of the Parents of Children with Intellectual Disabilities in the Context of Mixed Social Situations

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Abstract: This paper aims to analyze the phenomenon of the managing of the stigma of a child's disability by their parents. Using the concept of stigma by Erving Goffman, I point to its usefulness in understanding the management of stigma by parents of children with intellectual disabilities in the context of mixed social situations. The research utilizes qualitative techniques with special emphasis on unstructured interviews. The data analysis was performed following the procedures of the grounded theory. As studies have shown, parents of children with disabilities adopt various strategies and tactics during the encounters with other persons and institutions while dealing with everyday hardships.

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In this work I have sought to learn about the ways parents of children with disabilities perceive the world around them, making sense of its certain elements, which, in turn, provides a basis for them to take action to shape their living space.¹ I do not intend to address the issue of a child's disability from the perspective of a family tragedy, but to analyze how to deal with concealing and managing the openness concerning the child's dysfunction, which, according to parents, has a stigmatizing dimension and leads to social stigma. By using various strategies, the parents attempt to counteract the social stigmatization, and this is what I attempt to demonstrate in this paper. At the same time, I was interested in how the parents (mothers in particular, which was largely due to the fact that they were the ones who were much more often responsible for caring for a child with a disability and would, therefore, in many cases, be the parent who stayed at home, often giving up their job) deal with a situation of a change (which is often inevitable), which consists in progressing of the "visibility" of the dysfunction as their children mature and develop physically. I see the phenomenon of disability as a social construct which—taking on an embodied character—is becoming a source of stigma for parents with children with disabilities. Taking the above into account, the subject of my interest is the search for regularities in the interactive dynamics of the stigmatization process, for which mixed social situations (whether invoked in interactions or "present" in the strategic planning of activities by entities

¹ This text is part of broader research on the processual nature of changes taking place in multigenerational families, related to the growing up of children with intellectual disabilities. Therefore, the text is focused on the selected issue regarding the implementation of particular strategies and actions of parents in the context of mixed social situations—one of the leading analytical categories that emerged in the course of previous studies.

with damaged identity) are significant. Therefore, I used a concept crucial for understanding the dynamics of mixed social situations and the stigmatization process developed by Goffman—the concept of managing stigma (Goffman 1963).

Review of Studies over the Situation of Families with Children with Disabilities

Studies conducted with parents of children with disabilities show that a daughter's or son's dysfunction determines intra-family life, assigning new duties, functions, and tasks to each member, and often destroying its previous order (see, among others, Phyllis and Draine 1995; Hodapp, Glidden, and Kaiser 2005; Hodapp 2007). Scientific studies pay a lot of attention to the issues of parenthood and fulfilling the role of mothers (Docherty and Reid 2009) and fathers towards children (Heller and Arnold 2010), or the problems of motherhood and fatherhood of adults with disabilities (Hodapp, Glidden, and Kaiser 2005; Hodapp 2007). There is also research on the challenges of parental roles in the context of long-standing care and support in conditions of multigenerational families (Miltiades and Pruchno 2001). The interest of researchers is also stimulated by aging parents of adults with disabilities (as well as the persons with disabilities themselves), their challenges in everyday life, as well as the position, roles, and features of siblings of the adults with disabilities (Orsmond and Seltzer 2007). Seltzer, Floyd, and Greenberg (2005) analyzed the relations between the lifelong and long-standing disability of a child and the health condition of their parents.

Studies show that one of the effects of intellectual disability in a child may be the underestimated self-esteem of the parents. The sense of value that is experienced by parents raising mentally impaired

children is often lost, which, in turn, leads to social exclusion (cf. Orsmond et al. 2003). The society avoids contact with individuals with disabilities and their families, being afraid of their differences, problems, and sometimes strange—because incomprehensible—behaviors, and this, in turn, leads to the so-called apparent integration, namely, we are in favor, unless it concerns us personally, for example, we support integration, but we do not want our child to be a part of an integration class (see: Barnes and Mercer 1997).

Studies exemplify that parents of a handicapped child apply several strategies in this context (Zakrzewska-Manterys 2010). First of all, they stress their sacrifice for the handicapped child and resignation from personal plans. Second of all, there is strong stress on their contribution to the main social course, at the same time emphasizing their own, total and undoubted, normality. The patterns of coping with the trauma of disability found among parents can be divided into direct reactions (they are involuntary) and long-term strategies (they are associated with greater awareness of choices) (Kościńska 1995:90-94). The first type of strategies include escaping—towards alcohol or work; deformation of perception—parents do not acknowledge the actual condition of their child, they contradict the facts; cognitive subordination—search for information about the causes, seeking for the guilty party; searching for support—from other people, sometimes to have the responsibility accepted by others; objectification of a child—into an object which certain activities are performed over. Long-term strategies cover three basic types. These are: leaving a handicapped child at the side of the main stream of life (a child and their disability is a kind of wound that is better not to touch or talk about); normalization of life (reaching a certain compromise

that considers a child's needs and implementation of own plans); involvement in disability issues and making it a central point of one's life (cf. Zakrzewska-Manterys 2010:118).

The social support and the supporting factors may improve the flexibility of parents in dealing with the role, which is mentioned by Johnson (2000) and Phyllis and Draine (1995). The authors of the research emphasize that stress related to the situation of a long-standing role of a guardian for a child with a disability is a risk factor that may increase the probability of physical and mental consequences in parents. It is worth mentioning Freedman, Krauss, and Seltzer (1997), who analyzed the occurrence of a difference in four types of families, in terms of their characteristics, good mood, functioning, and formal support. Apart from data that suggest physical or mental issues in guardians that take care of and provide for the individuals with disabilities, survey research and clinical studies suggest that despite real psychological burdens there is also a certain positive impact from the situation of being a guardian—a parent of an adult child with mental disorders. The report and the results of research conducted by Aschbrenner, Greenberg, Allen, and Seltzer (2010) also showed the positive aspects of being a carer of a child with mental disorders. The authors pointed to existing relations between a parenthood role and experiencing positive life transformations while dealing with mental diseases of adult children.

Summing up, we can say that a family with a child with an intellectual disability fulfills the same functions that a family with a healthy child. However, the difference is in the conditions, implementing particular tasks, and in the intensity of their influences. A family that brings up a child with mental

disability functions in the context of permanent overload. The distortion of the correct development of a child impacts the functioning of each family member and often poses a specific stress factor. Of course, the very presence of a child with limited mental capability within a family system does not make it dysfunctional at once. It is only the way in which families deal with a child's disability crisis in different situations and periods that determines their functionality or dysfunctionality.

Research Methodology

In this paper, the basis of the analyses carried out is an interpretative perspective—describing the world in the categories of reality construed in the course of symbolic interaction. According to the assumptions of the above paradigm, it has been assumed that individual actions are taken in specific situational and interactional contexts, thus resulting from the interpretation of a given event, situation, or phenomenon by a specific social actor. The definition of the situation is co-created and maintained in the course of interaction. Therefore, the reality of subjects appears as a configuration of certain meanings, the sense of which can be discovered as long as the experience of the people who produce them is captured. The leading theory explaining the analyzed phenomenon in this paper is the concept of stigma (Goffman 1963), which allows understanding the mechanism of the formation of unfavorable social attitudes and the barriers “separating” a person with a disability from society.

The research material in this study is the information obtained from parents, who experience significant transformations in their lives, related to the process of bringing up and taking care of their children with disabilities. These were, first of all, those

families who have experienced a child's disability since birth (including prenatal and early childhood) and thus parents who have not experienced healthy parenthood in their parental “career” (I do not include situations where parents have more than one child and one of them is completely healthy).

Interviews were conducted with the representatives of such a category. The use of this type of data acquisition tool meant that each of the interviews was individualized. This means that the course of each interview was moderated on an ongoing basis and its content depended primarily on what issues were pointed out by the interviewee and how they emphasized the information appearing during the interview. The interviews were conducted in natural settings, mostly at the interviewee's place of residence, which was largely due to their situation related to the need to provide permanent care to family members with disabilities. Only a small part of the interviews was carried out outside the place of residence, which, in turn, was a result of limited dwelling conditions and the inability to speak to the interviewee. In any such case, the interviewee must have been able to ensure care for the child with a disability by other people (usually other family members).

All participants of the research were informed about the purpose and nature of the research, as well as about the terms and scope of adopting the data collected during the interviews. The research subjects could have their doubts clarified and ask questions allowing them to understand the essence of the research to its fullest extent.

In total, at this stage of research, 35 interviews were carried out between 2017 and 2019 among the parents of children with intellectual disabilities. The

interviews were performed with 22 women and 13 men between 36 and 78 years of age. The interviews usually lasted from 1 to 3 hours. Before the analysis, the interviews were transcribed word-for-word, preserving the details of the interviewees' utterances as faithfully as possible. All data were anonymized, which consisted of the permanent deletion of all information concerning first and last names, proper names, et cetera, or their replacement by other data which make it impossible to identify the participants.

Analysis and interpretation of the research material were conducted in compliance with the principles of the grounded theory methodology (Glaser and Strauss 1967; Glaser 1978; Strauss and Corbin 1990). Hence, the selection of subsequent cases for the research was of theoretical character (*theoretical sampling*), based on the constant comparative method. Thanks to theoretical sampling, a researcher, while collecting, encoding, and analyzing the materials, is making simultaneous decisions about where and what data to collect next (Glaser 1978:49-50; Strauss and Corbin 1990:177). While applying the constant comparative method in my search for other data, I attempted to choose cases that are both highly various and similar to each other, to grasp a maximum number of conditions differentiating the categories and their mutual relations (Glaser 1978:45-53; Charmaz 2006:74). This resulted in the fact that the researched group included the families taking care of people with intellectual disabilities of various degrees and types. The selection of cases lasted until theoretical saturation was achieved, that is, up to the moment when subsequent cases confirmed previous analytical findings (Glaser 1978:142).

Data analysis was supported by CAQDAS—Computer Assisted/Aided Qualitative Data Analysis

Software. The analytical and conceptual works were performed with NVivo software. The data were analyzed by adopting the functions implemented in this program, in a way corresponding to the requirements set forward by procedures of the employed research methods. The software also gave the possibility for continuous modification of all elements of the project as new information appeared. This made it possible to follow the data freely and the codes generated from them could have been changed quickly if they did not sufficiently reflect the current content of the collected material (Glaser 1978:4-5). In addition, NVivo enabled the creation of a structured code structure, that is, a category tree, in which certain modifications can be made. Apart from reflecting a code structure in the form of a category tree, NVivo allows creating relationships between particular categories. Using this function, it was possible to indicate the type of relationship and whether it was one-way or two-way, or simply to establish the very fact of its existence. The computer program, which was used to analyze the data, has special functions, which enabled the “verifying” of the hypotheses through scanning the parts of interviews and notes from observations. The software used was useful for improving theoretical concepts, as well as for creating and “consolidating” emerging hypotheses.

The Importance of Stigmatization in the Context of Mixed Social Situations

When the bearer of stigma and normals are in the same social situation, that is, in a direct physical co-presence both in conversation and even in some unorganized gathering, we are dealing with what Goffman (1963:44) calls mixed social situations. What is important is that interactions taking place in the context of mixed social situations involve

a constant interpretation of the interactional partner's identity, an attempt to maintain it, or, on the contrary, to modify it. Such an action of a person with a discrediting feature is taken not only in the course of the interaction itself, but also at the level of its "planning." Since parents of children with disabilities usually have extensive biographical experience of being cast in the role of the stigmatized, in their case, the opening of each subsequent interaction is preceded by the anticipation of their public perception in terms of stigma.

Therefore, in the paper, I will treat disability as one of the individual's attributes, which becomes meaningful in different social situations. Disability, similarly to ability, are social constructs and as such, they depend, among other things, on the social context, the course of interactions, or the response of normals (Goffman 1963). I, therefore, look at disability through the prism of its contextuality, interactivity, and emergencies, as well as its multifactoriality and diversity.

The basis for interactions in the context of mixed social situations is the work on the stigma. It involves the management of stigma and is also referred to as work on self-presentation, because, in fact, the stigma treatments focus on the proper presentation of the person. An individual's situation depends largely on whether they recognize that their stigma is immediately recognizable by others (the situation of a discredited person) or is neither known nor recognized (the situation of a discreditable person) (Goffman 1963:34). In the case of a discredited position, there is a strong tension, manipulating it, adopting various tactics enabling or facilitating the transition between an assigned and real identity. In the discreditable position, on the other hand, an individual is not burdened with the accompanying tension

resulting from the labeling character of the interaction, but strives to manipulate the information concerning whether, "To display or not to display; to tell or not to tell; to let on or not to let on; to lie or not to lie; and in each case, to whom, how, when, and where" (Goffman 1963:56). The manipulation of the stigma (in the case of discredited stigmatists) and the manipulation of information (in the case of discreditable stigmatists) is performed due to appropriate interactional tactics, which, in turn, depend on how the individual is perceived by others and whether they are known in their environment (cf. Błęszyńska 2001:92).

Both dimensions of the phenomenon under study—using Goffman's (1963) terminology—build a dramatic performance by people with the disability stigma. For this reason, in the case of parents of children with disabilities who are discreditable, the main problem in interacting with normals is the tension created in social contacts, whereas in the case of discredited people, it is the proper management of information about their child's disability (Goffman 1963).

To understand the specifics of the interactional processes that make up the stigmatization process, it is crucial to recognize that the importance of mixed social situations is twofold. On the one hand, it is about the meaning that comes into play in the course of the interaction, in its dynamics, when it comes to a discrepancy between the attributed identity and the actual identity, which results in the awarding of stigma to the discredited party and the modification of the course of interaction by the inclusion of a certain type of tactics by that person (Goffman 1963). On the other hand, it is about the importance of mixed social situations and stigma in the case of a person with a discrediting characteristic, but in

a way beyond any interaction with others. It manifests in the continuous building of the strategy before taking action, in the continuous consideration of communication options before opening an interaction, and in the planning of ways of controlling it, which is supposed to increase the chances of negotiating a satisfactory definition of the situation and social identity by a person with a discrediting characteristic. These processes are exemplified in the work undertaken by the bearer of stigma, which, according to the criterion of its *purposefulness* (or, in other words, the nature of the assumed effect), can be divided into the work on annulment, the work on highlighting (manifesting), and the work on suspending stigma.

Work over the Annulment of Stigma

The bearer of the stigma makes an effort to make their stigma unnoticeable to others and that their behavior does not deviate from the normals' behaviors. Therefore, the parents of children with "hidden" disabilities often try to control the information about the condition of their son or daughter. This happens because the very fact of the child's disability is hard to accept for them; it becomes even more burdensome when it begins to function as an element of their own identity. This is, first of all, due to a negative connotation of disability in a broader social context; but it may also result from an unclear status because not all ailments are generally recognized as credible health problems that entitle granting a status of a disabled individual (Kroll-Smith and Floyd 1997).

The cancellation of stigmata sometimes becomes a meaningful and complete interaction in which parents of children with disabilities take steps to alleviate the tension inherent in mixed social situ-

ations. Such a work over the annulment of stigma assumes pushing it into the background of the interaction and is implemented by the following strategies: *skipping* and *covering* the stigma.

Strategy for Skipping the Stigma

While children with visible disabilities are imposed with a label by the environment, the children with hidden disabilities are labeled as a result of actions and decisions made by their parents in terms of covering or disclosing the stigma. Therefore, parents of children with disabilities that are not visible "at first glance" need to think carefully about how they will engage in active stigma manipulation (Carey 2013:142) and what actions they will want to take to properly manage information about their child's disability (Goffman 1963:78). Goffman's information management designed in this way is called passing and, as he writes, "Because of the great rewards in being considered normal, almost all persons who are in a position to pass will do so on some occasion by intent" (Goffman 1963:94).

When it comes to parents of children with disabilities, this strategy was implemented by means of *catching-up* and *keeping your head down* tactics. A common characteristic of both tactics is the work on omissions, which often takes the form of being "hyper-prepared," that is, exaggerating the correctness and meticulous preparation of the bearer of stigma. Thus, these tactics are a kind of attempt to compensate for certain deficiencies with other types of assets.

In the case of the catching-up tactics, it manifests itself in taking action from the perspective of their *hyper-correctness*, which consists of being overly correct, cultured in relation to other people who usually

do not carry any stigma. At the same time, the bearer of the feature discrediting in interactions with others begins to feel a strong uncertainty about how they are perceived by their interactional partners, which sometimes leads to mental and emotional “self-disengagement” to avoid negative experiences (cf. Goffman 1963:45). Parents of children with disabilities are under constant stress, ready and vigilant to assess the impression of their child’s disability others may have. They avoid any labeling errors.

Others don’t understand us [the parents of children with disabilities]. Anyone who doesn’t have the same experience won’t understand what it means to be a parent of a disabled child. The worst part is that people are also quick to judge us. Generally speaking, it is as if others understand, sympathize with us, and treat us with forbearance. But, let only one person stand eye to eye with us and our child, they are about to change the standing. It doesn’t take much because the understanding passes as soon as the direct contact appears, whether on the bus or in the park. When they hear a child screaming, they see them salivating, or waving their hands, there is a distance, and sometimes unpleasant words will also appear. [i.18.05]²

Parents of children with disabilities have only “one chance”—they must not be mistaken. They get one chance to present themselves, to improve their existence. Unless they use it skillfully, the chance is gone. There will not be another one, as they themselves emphasize. Meanwhile, people without children with disabilities have an infinite number of opportunities, which gives them the chance to

make mistakes and correct them. This responsibility for “one moment” reinforces a constant sense of tension, of being on standby, forcing the parents of children with disabilities to behave hyper-correctly, overly “normal,” which sometimes only then becomes “abnormal.”

Actually, we’re being reviewed all the time. Wherever I go I get the interest, so I have to watch out, at least as much as I can, in my situation. But, one thing is certain, I will not disappear in the crowd, because I “stand out” thanks to my Józek [changed name], and wherever I go with him, there will always be some curious looks. [i.19.04]

The catching-up tactic also involves an approach based on the *hyper-readiness* of the parents, that is, an extremely meticulous preparation (sometimes also of the environment) for the various events to take place. Parents of children with disabilities are, in a way, in a state of constant, increased readiness and, at the same time, they constantly analyze everything that could potentially happen. Thus, situations that are completely natural, almost imperceptible, repetitive in the case of normals, fill the foreground of their lives as mediated carriers of stigma, sharpening their attention and vigilance (cf. Goffman 1963:128). They sometimes want to be perceived as “normal” by behaving “normally” to such an extent that they become artificial and exaggerate a number of behaviors, which, in turn, leads to secondary labeling, achieving an opposite goal to the intended one.

It’s not so obvious because I’ve already experienced plenty of different situations, tried a lot, and felt it on my own skin. I’ll put it this way, there is no single good practice that is always effective, because a lot depends on people, on other people and their attitudes.

² I use indications of the cited fragments of my interlocutors’ statements throughout the whole paper, where the letter “i” means an interview, the first figure indicates the year when the interview was carried out, and the last figure is the consecutive number of the interview. For example, the indication i.18.05 means that it was the 5th interview carried out in 2018.

There are situations where it is better to pretend, and situations where you can be more direct and open. I'd say there's no rule in this regard. [i.19.01]

In addition to the catching-up tactic described above, the research participants also use the tactic of *being transparent*, interchangeably referred to as *keeping your head down*. The main mechanism here is for parents to try to pass the stigma by "blending into" their surroundings, not to be seen. Two main forms can be distinguished within the framework of this strategy, which, as in the case of the catching-up tactic, are in the form of "hyper," that is, they consist of exaggerating the correctness and preparing thoroughly for any encounter with normals. The former is *hyper-sensitivity*, while the latter can be described as *hyper-subtlety*.

Hyper-sensitivity seems to complement the above described "hyper" tactics, as it consists in particular in the care taken by the parent of a child with a disability to ensure that the child's dysfunction is not revealed, and thus the identity of the parent would not be at risk. In this case, it is about situations in which the disability of the child is not immediately visible, but also about the ones in which the disability is visible and yet not so obvious—due to practices related to the manipulation of the stigma of the disability—that parents manage to minimize the social effect of the stigma of the disability. It is also not uncommon for circumstances to occur where the true identity of the interactional partner is questioned. Goffman's words can be recalled here again (1963:81), according to which it fits into the mutual relations concerning mixed social situations in a suspicion awareness (Strauss and Glaser 1974), that is, situations in which there are signs containing specific information, sometimes revealing the discredibility of a person.

I think everybody wants to be considered normal, at least I think so. I'd say considered an ordinary person and parent. It's just that we [the parents of children with disabilities] are not like that. We are "different" because this is how people, who usually know little about us, see us. Am I actually "different?" I don't think so, at least I don't feel like it. Or rather, I want to feel like someone normal. That's why sometimes I just prefer not to talk about myself, about my child to other people. Then I don't feel like they give me this label of "the other." [i.17.04]

The parents feel that various mistakes or failures, which are, however, difficult to avoid, are immediately interpreted as a sign of the stigma of their daughter's or son's disability. Thus, the parents undertake continuous work on the behavior of both their child and their own. On the one hand, it consists of preventing various uncontrolled and abnormal behaviors of the child (e.g., unnatural movements or loud incomprehensible sounds), done due to their daughter's or son's dysfunction. On the other hand, it is constantly monitoring oneself and one's emotions in difficult and stressful situations, which results from the stigma of disability. In the case of parents, therefore, this is a work on emotions, especially as emotions which—being natural in the case of normal people—often become undesirable and quickly interpreted as inappropriate (e.g., what can be interpreted as behavior falling within the "norm" in the case of parents of fully capable children, can be considered as "degeneration" when it becomes a matter for parents of children with disabilities). Hyper-sensitivity is supposed to lead to "normality," but all these "normal" reactions (emotions) are under the social "magnifying glass." Hence, a parent as a bearer of stigma, while being censored, takes up work on "normal" emotions, which by definition seems to be a Sisyphean work.

The parents of children with disabilities are aware that they represent a social group that is subject to a more stringent assessment, which does not apply to people without a discrediting characteristic.

I say that I always feel like I was a kind of an alien who fell from heaven having my face engraved with some slogans telling that I'm out of this world. It may be so because my world is different from the world of most people who have nothing to do with disabilities. That's why I'm not surprised that people don't understand me and treat me a little bit like a freak. It's the way I feel, but I guess I'm not the only one who feels that way because when I talk to other parents [of children with disabilities], they have similar experiences. [i.18.09]

Hyper-subtlety is another tactic that can be distinguished in the process of keeping your head down. It reveals such stigma bearers' behaviors that make the parents of children with disabilities attempt to control the emotions and thus not to show their nervousness, embarrassment, or dissatisfaction, among other things. It is, therefore, an activity that aims not to "burden" the parent with too much curiosity, interest, and sometimes expressing some dissatisfaction and disapproval on the side of normals who experience "disruption" of normal social interactions in contact with parents of a child with a disability. Hyper-subtlety can be especially observed in difficult moments due to the child's uncontrolled behaviors or the reactions of persons around them who often express their dissatisfaction, indignation, and sometimes unrestrained and tactless curiosity in a more or less direct and ruthless way.

It's like, on the one hand, the parents of children with disabilities try not to arouse any curiosity and unnecessary interest in themselves and their child,

rather avoiding than exposing themselves to various difficult experiences in contact with the surroundings. On the other hand, it's also a way of how fully capable people act; when they don't know what to do or how to behave in a given situation, they make us feel transparent. This has its advantages and disadvantages as it gives more freedom and fewer misunderstandings, but it also tends to be tiring and frustrating when you feel you're not treated as a serious partner. [i.17.05]

What is more, there are some situations when the "normal" treatment of the stigma bearer starts to be interpreted as *playing a game* (usually due to the natural functioning in the suspicion awareness context), which, in turn, puts the normals in a relatively difficult position of completely losing track of what may be the best behavior in a particular situation. It is, therefore, an element of *sentimental work*, which, according to Strauss (Strauss et al. 1985:129-132), is an element of work based on calming emotions and involving the patient in various therapeutic and support activities. At the same time, parents themselves often point out that fully capable participants of the situation behave in this way because they feel embarrassed and do not know how to behave when they "discover" their child's disability (cf. Belzyt 2005).

Unfortunately, but it's often true that people aren't so good when [you] get to know them...I say this because I've experienced it more than once. When somebody doesn't know me, our situation, and my child, they treat us differently. Unfortunately, I experienced the way people treat us when they find out about the disability. There's either this artificial compassion, which I just don't like, or this gentle avoidance because they don't know how to behave. Anyway, it's just so unnatural and sad at the same time. [i.18.09]

Summing up—the practices of hyper-correctness, hyper-preparation, proving usefulness and the mechanisms of hyper-sensitivity and hyper-subtlety implemented as a part of the tactics of keeping up and keeping your head down seem to correspond to Goffman's sense of normality in a form of constant control over a bodily behavior, creating some conditions of "normality" and relative safety of an individual, allowing them to safely carry on with a given activity, paying only some superficial attention to the stability of the surroundings (Goffman 1972:248). By creating appearances of normality, the bearer of the discrediting characteristic appears to be making efforts to omit this characteristic, concentrating on recognizing and organizing the course of interaction in such a way as to make their stigma as little insistent as possible (cf. Goffman 1963:145). At the same time, the "oversensitivity" revealed in the interactions seems to drive the mechanism of stigmatization, differentiating it into *potential stigmatization* (to some extent "provoked" by the hosts through hyper-correctness, delicacy, sensitivity) and *actual stigmatization*, in fact, directed towards them by clearly disconnected normals.

Strategy for Covering the Stigma

Another strategy implemented as a part of stigma annulment work, apart from skipping, is the covering strategy. It is no longer only about the discreditable, but also about the discredited persons, appropriately situating the interactions at the meeting point of visibility and obtrusiveness of stigma (Goffman 1963:143). As Goffman writes, "persons who are ready to admit possession of a stigma (in many cases because it is known about or immediately apparent) may nonetheless make a great effort to keep the stigma from looming large. The individual's object is to reduce tension, that is, to make it easier for

himself and the others to withdraw covert attention from the stigma" (Goffman 1963:124). It is, therefore, a matter of diminishing the importance of stigma or diverting attention from it. The following tactics are adopted within the described strategy: *opposing trait tactic* and *dominance tactic*.

In the case of the opposing trait tactic, parents of a child with a disability build interaction with normals by concentrating on the *trait that is opposing (contrasting)* to the discrediting one, thus trying to divert attention from the stigma that could dominate the encounter. They, therefore, look for specific attributes to balance their stigma. Such a significant feature is supposed to raise the social status, ennoble the individual, thus acting as a "smokescreen" for the stigma they possess. This could be, for example, emphasizing certain attributes of both parents and the child, while, at the same time, "masking" the child's disability (which is possible for a child whose dysfunction may be hidden), as stated in the following quote:

Actually, by the way, when we were away with my husband and Jarek [changed name], and he was still little at the time, and it was impossible to know by looking at the child that it was a disabled child, it somehow came out the same way as if we wouldn't say anything about it to the people we met. And we met a nice family, also with children, and they were even enchanted by Jarek that he was such a pretty boy with curls, so we wanted to keep it up, in fact, we simply didn't talk about our problems and we just enjoyed the moment when we could have felt like other parents. [i.18.03]

At the same time, in the construction of self-presentation, the *tactic of domination* gains on importance, which consists in dominating the course of inter-

action by the bearer, who thus does not allow the stigma to be emphasized and “presented” in the foreground. An example is the emotional and aggressive reaction of parents in the form of an attempt to scream at the judge to “force” them to make the “right” decisions and thus avoid possible questions and discussions about stigma. In such a situation, Goffman speaks of an arrogant, even harsh, reaction, apart from defensive automatic switching-off (Goffman 1963:49-50). Such a range of behaviors sometimes reveals the bearer’s losing control over the interaction, demonstrating the chaos and nervousness of entering into relationships. The interaction thus perceived by the bearers of stigma is, at the same time, interpreted by normals as a source of uncertainty, showing the bearer as a person struggling with extreme emotions and behaviors, embedding their interactions in the context of mixed social situations.

I try not to get too mad, as I explain to myself that I have been through so much that I already have some experience and I can feel the situation and somehow respond to it properly. But, it happens that I lose my temper and I’m overwhelmed, and it happens that I use a little hotheaded character as a smokescreen. I know how to be suave and nice, but I can also respond a little more sharply and strongly so the people simply focus on me and not on my child. [i.17.08]

Summing up the work over the annulment of stigma (skipping and covering), it is worth mentioning that if an individual seeks for a kind of separation, not assimilation, they may discover that they use their enemies’ language and style out of necessity (Goffman 1963:138), which paradoxically leads to the strengthening of the stigma. At the same time, the bearer blocking out the harm from the normals starts to become more like them in their behavior.

The Work over Highlighting the Stigma

In addition to the work of the annulment of stigma, there is the *work of highlighting it*, otherwise manifesting the stigma. This is the work intended to purposefully reveal and highlight the stigma. The work over highlighting the stigma consists of the efficient manipulation of the stigma in order to manifest it, to flash it around, to expose it where the situation (interest) requires. Parents, seeing the benefits of the disclosure of the stigma, decide to use it in a specific interest, by efficiently manipulating their image according to their needs and circumstances. Examples of the work over highlighting the stigma are the *construction of self-presentation of the poor/wronged, clumsy/naive, or chosen/strong*. All of the strategies mentioned above are resorted to by the parents of children with disabilities, both those who act in a fully conscious and benefit-oriented (calculating) manner, as well as resulting from the actual life situation and confirming the actual mental and social status.

Constructing the Self-Presentation of the Poor/Wronged

Construing the self-presentation of *the poor/wronged* was of particular importance in building the image of the parents of children with disabilities, who took on a more or less unconsciously defensive position in their interactions with others. But, at the same time, they are emphasizing the difficulties of life and everyday problems, which sometimes even takes on the form of a stirring of various kinds of ailments. It was about properly presenting the self (fairly) as one who should be supported because of their social status. The tactics used to construct the self-presentation of *the poor/wronged* include the *tactics of telling a story about harm* and the *tactics of playing a poor person*.

The tactic of *a story about harm* is to present the life story to the interactional partners in a way that emphasizes the adversities and obstacles a parent of a child with a disability (potentially) encounters. While such a narrative may involve authentic experiences and accumulated difficulties, which a parent of a child with disabilities is exposed to, it may also be the result of well thought-out ways of expressing and highlighting the problems involved in having a child with a disability to obtain specific benefits (e.g., various forms of support).

You see, I have such a situation that it's even hard to talk about it. But, it's nothing when compared to my friend because she has a child that doesn't move at all, so imagine how she has to do everything with him, and how much it burdens her physically and mentally. But, each of us, parents of children with disabilities, has our own problems and difficulties to deal with on a daily basis. [i.17.08]

In turn, as part of the tactic of *playing a poor person*, the parents presented themselves (personally and in relation to the situation in life) as poor in a literal, but also symbolic sense—as being wronged by fate. Sometimes this was accompanied by appropriate staging and deliberately selected attributes associated in a stereotypical way with poverty (usually appropriate clothing, used according to the situation and needs, e.g., during a visit to a given institution). In this way, they were part of the social image of “disability,” which, in their opinion, was to make it easier to obtain external support.

It is a bit annoying that such a stereotype of the mother of a disabled child is that she is a person who can be neither well-dressed nor well cared for, but should only be like the Polish Mother. I'm sorry to say this, but it often looks like that when you look better, oth-

ers immediately think that you have no problems and difficulties in life. That is why I will tell you that if you want to make a good “impression,” that is, one that wouldn't be too appealing to anyone, it's best to choose an outfit that's not weather-related, but for the circumstances of what you want to do at the moment and I'm not thinking about the opera right now [laughter], but, for example, about an office or institution. [i.19.09]

Constructing the Self-Presentation of the Clumsy/Naive

Another strategy in the work on highlighting the stigma is to construct the self-presentation of the *clumsy/naive* with the help of *playing clumsy* tactics. This tactic is used when it allows a parent of a child with a disability to benefit from the specific advantages of having their stigma. Playing incompetent was one of the adaptation strategies for parents to cope with the situation. Then, *playing clumsy* relieves the parent from having to explain a lot of uncomfortable things, and also makes it easier to handle various (e.g., official) matters.

I know such [parents] who don't like sharp-witted, but they can do everything and they cope well. But, in front of others they play the poor who can't deal with anything. Sure, there are such, but there are also a lot of people who just made a way of life out of acting so. [i.17.02]

By using this tactic, the parent of a child with a disability has the opportunity to deal with situations that may cause them some real difficulties (e.g., in official matters) and thus reduce the accompanying feeling of uncertainty in dealing with institutions or their representatives. It sometimes happens that such a tactic served to avoid responsibility for the

actions taken while trying to remain “blameless” in a situation where a given type of conduct may have negative consequences or may have been associated with certain ailments (e.g., when the deadline for dealing with a particular case was not met, which could have resulted in certain sanctions). In this way, they used how the “normals” perceived the bearers of stigma, designing the presentation of themselves as uninformed, pretending not to know or understand what is going on (Goffman 1963).

Constructing the Self-Presentation of the Chosen/Strong

The third example of highlighting the stigma is the construction of the self-presentation of *the chosen/strong*, which means attributing to oneself the role of the “chosen by fate” because they fulfill the difficult “task entrusted to them (by God)” of being a parent of a child with a disability. This strategy is implemented by means of *contrasting tactics*, that is, striving to achieve a contrast with the category of people who are to serve as a comparative group, in comparison with which the stigmatized person is to obtain a *better*, because higher, social status (Goffman 1963). In the case of parents of children with disabilities, this meant that they compared themselves with parents of healthy children, recognizing that their situation was not only objectively more difficult and complicated, but it also required much more energy and commitment. Hence, as some of the parents used to say, “not everyone would be able to cope with such hardship,” which was reflected in the occasional circumstances of some parents leaving their children with disabilities in hospitals (right after birth) or care facilities. Therefore, those parents who have persisted in their attitude of maintaining and caring for their disabled daughter or son emphasized their commitment, but often also

their above-average (“superhuman”) efforts, which, despite numerous adversities, they have managed to meet.

The kind of experiences I have, it’s hard for me to say. It was a very hard time, so now I wonder how I managed to survive it at all. But, I was younger, I had more energy, so maybe it was easier. In any case, I don’t wish such experiences on anyone because probably not everyone would be able to cope and come out of such situations. Because I will tell you that there are parents who give up at the very beginning, although I don’t want to judge them either because it is an individual matter. [i.17.08]

Moreover, those parents emphasized that, in some way, they were designated by God or “anointed” by fate to bear the burden of care for a child with a disability. In this way, they highlighted the contrast between them and the parents of fully capable children, who, although “endowed” with a fully capable daughter or son, which, by the way, they considered to be the highest value, did not experience all those emotions, feelings, and, above all, did not have the opportunity to “test themselves,” “pass the exam of the highest form of love,” as they themselves did.

I say that we, the parents of disabled children, are the chosen ones, and we make up in excess during our lifetime, so that later on we can provide ourselves with a suitable place up there [laughter]. But, tell me, aren’t those efforts and everything that comes with them the best capital for the eternal life [laughter]. [i.19.07]

This way of presenting oneself and the situation was a form of ennoblement, recognition, and highlighting the positive aspects of the whole situation: superhuman perseverance (“which not everyone

has”) and a kind of “distinction” by fate guaranteeing that “their reward awaits them [in heaven].”

Summing up, the described course of interaction is of great symbolic significance as it allows the discreditable individual to give themselves a sense of control over the situation, which, in turn, can be translated into the experience of a sense of interactional activity that the individual can *design* for certain areas of the more *uncertain* institutionalized public space. In this sense, the strategies undertaken by parents of children with disabilities can be looked at from the perspective of partners maintaining a certain order of interaction, the disruption of which could lead to a kind of interpretative confusion (cf. Garfinkel 1967). In this way, parents attempt to take symbolic control over certain parts of the space by means of conducting the interaction taking place on *their own rules of the game*, which is often achieved by means of a certain type of capital that they have at their disposal for such a circumstance (such capital can be, among others, the ability to cope with stress or having adequate resources of “life” experience).

Work over the Suspension of Stigma

In addition to the work over the annulment and highlighting the stigma, the work on *suspending the stigma* can also be distinguished. This work seems to be a kind of compilation of the two previous ones, consisting of temporary, periodical suspension (annulment) and “activation” of (highlighting) the stigma, depending on the situation. In the case of parents of children with disabilities, the work of suspension is to refrain from emphasizing the discrediting feature, or at least “not to flash it around” at a given moment. In such a context, a *hold-up* tactic is employed, used especially in building one’s image

in the form of relationship work. The suspension of stigma is revealed in **an attempt** to temporarily and occasionally (situationally) exploit the parent’s ignorance of others having a child with a disability. A specific type of the closed context of consciousness (Strauss and Glaser 1974) applies here because it is not the environment that hides the truth from a given person, but it is this person who takes advantage of the fact of unconsciousness of the environment as to the feature (property) that they possess and do not reveal to others.

In my case, it was like, I was trying to get a job because after Janek was born [changed name], I couldn’t go back to work for a long time, so I didn’t say that I had a disabled child when I applied for work. In my case, fortunately, I had the support of my parents and I knew that I didn’t need to have any preferential working conditions to care for my child. That’s why I could afford such a ploy and didn’t say anything about family problems. I was simply afraid that it might harm me when applying for a job, and yet employers look at private matters differently, so I was silent on this issue, hoping that if they get to know me at work and when I find myself there a little bit, then maybe I would say something about it, or that it would just come out at some point, but without any negative consequences for me. [i.19.02]

It is worth noting that in case of manipulating the stigma of “juggling” the image of the parent such activities often carry the risk of discovering a hidden disability, which may lead to stigmatization, from which they tried to escape, but also to exclusion and marginalization resulting from the loss of credibility. The disclosure of a disability can expose parents to constant attention to stigma, as well as it may trigger the excessive curiosity of the third parties, combined with the crossing of privacy bound-

aries in formal situations. For this reason, parents of children with disabilities need to think carefully about how they will engage in active identity manipulation (Carey 2013:142), whether they will try to hide it and make their children consider themselves fully functional, or, vice versa, they will apply a policy of openness and transparency. Or, perhaps they will combine both strategies and use them depending on the context.

Discussion

Literature describing the situation of families with children with disabilities usually discusses the attitudes of parents, the values of married life, the atmosphere of coexistence in the family, the family's social structure, sometimes personality features of the parents, assuming that the greater the disruptions in the scope of these qualities of family life, the greater the disorders in the processes of raising disabled children and taking care over them. Such an analysis model fails to explain the complexity of the situation of families. What is more, such a model assumes that there is a close causative relationship between a child's disability and disorders in the social adjustment of parents. It is not sufficiently explained how it happens that disruptive behaviors are formed in a family bringing up a child with a disability, but also such behaviors that allow for effective social roles and enable parents to function properly in the context of changes taking place within the identity area.

While criticizing such analytical models of the functioning of families with disabilities, in the case of this research, an interactionist approach has been proposed. In this perspective, the social roles of the parents are being constantly produced in a reflective process of interpretation, and their implementation

is not so much a simple application of the rules that the society suggests, but is creative in nature, associated with its active co-development in the processes of interpretation, creation, and modification (Hałas 1987). Based on the assumptions of the interactionist approach, identity is also created as part of the continuous process of establishing relationships between the individual and one's surroundings. In the process of defining oneself, the individual compares oneself with other people, noticing the similarities and differences. They also want to stress their individuality and distinctness. In this perspective, the human sense of identity is mainly related to their own existence, the feeling of distinctiveness from the surroundings, the internal cohesion, one's own value, autonomy, and independence (Piotrowski 1998).

Furthermore, such an approach allows the adopting of a more systematic perspective when looking at the whole family because it is clearly visible that there are mutual dependencies between the behaviors and feelings of family members; the emergence of changes in the behavior of one person in the family (e.g., due to having a disabled or sick child) impacts the situation of all its members, namely, the functioning of the family system as a coherent whole. Also, the functioning of such families is also affected by the system of the social environment's conditions, where the family with a child with a disability lives.

Unfortunately, due to misinformation and misunderstandings, people with disabilities and their families are often not considered equal or valued members of society. Dr. Martin Luther King, Jr. said: "As long as the mind is enslaved, the body can never be free." To paraphrase these words, we can say that as long as people are ashamed of who they are, they will never

realize the true equality and freedom they want, and can, achieve. It is worth taking into account another, and, at the same time, relatively new, approaches related to disability, which is quite clearly resounding within the framework of the conducted research, namely, disability-pride movements. According to this approach, there is a great need to create a counter-culture, which teaches new values and beliefs and recognizes the dignity and value of all human beings. A direct response to this need is disability pride, which was defined as the acceptance and respect for the uniqueness of every person and seeing them as a natural and beautiful part of human diversity.

Therefore, the adopted research models enable us to look not only at the issue of stigmatization analyzed in this text, but also highlight a broader perspective referring to the issue of the whole life and the functioning of families with children with disabilities. In this way, instead of asking about the nature or essence of disability, it seems more important to ask the following questions: what it means to experience disability and how it is experienced? This is how we ask about how a certain context for the reality construct regarding the parents of children with disabilities is created. In such a perspective, the disability is not a fact the nature of which is to be discovered, but rather an experience that awaits to be described; a social and cultural creation composed of various experiences that await to be recognized (Podgórska-Jachimiak 2014:78).

Conclusions

The presence of a child with an intellectual disability exerts a multifaceted impact on the functioning of the family and can also be a source of complex emotions and experiences. The fact of the child's disability is usually related to the changes in the family's material situation, a change of its social situation, and

the psychophysical situation of its members. The confrontation with the child's disability means, among other things, a reformulation of goals or changes in expectations connected with the birth of the offspring, which leads to the feeling of mental tensions and negative affective states. One form of adaptation of parents to such living conditions is the emergence and implementation of particular interactional actions and strategies. The research has shown that at the heart of the strategies and tactics that make up the interactive space existing between the parents of children with disabilities and their environment is the importance of the stigmatization process that takes place in the context of mixed social situations. For this reason, the parents of children with disabilities, as carriers of a discrediting characteristic, are often involved in mixed interactions. In this sense, the strategies taken by parents can be seen in the context of the metaphor of the self-defense tactics (of the family) that are adopted to manage *stigma* as part of a wider process of dealing with stigma.

For this reason, when planning the strategies for the everyday functioning (and thus *presentation*) of the family in an interactional space that goes beyond the safe hinterland of their private area, they exhibit great concern both towards managing its visibility (or openness) and in building justifications for taking specific actions to conceal it.

The parents of children with disabilities are, therefore, aware of the stigma, which tints the interactions they enter to increase the level of control over how they may unfold. From this position, they initially evaluate their interactional partner, deduce the identity assigned to them, and sketch a preliminary pattern of the interaction before it takes place. Such actions take place before the participants enter the interaction or refer to their interlocutor's mes-

sage opening interaction with them, with the aim of strategically modifying the context of the encounter. The continuous censorship of its planned course takes into account the evaluation in terms of public expectations.

A huge part of the interactional work of parents of children with disabilities, therefore, takes place not as much in the course of the interaction itself. The dynamics of which are underpinned by participating in a mixed social situation (with one partner being cast as the stigmatized and the other as the stigmatizing). This happens when the person with the discrediting feature assumes that they will have to deal with the stigma attributed to them by their interlocutor(s), as in the mind (consciousness) of the person with the discrediting feature—in the

course of their interactions with themselves. This is the kind of work that can be described as a sort of preparation for initiating an interaction or responding to a message inviting an interaction. The purpose of such preparation is to increase one's sense of control over the course of potential interaction in the direction of protecting the bearer of the stigma from degradation.

Although the context of mixed social situations is only invoked at the time of the interaction—due to knowing one's stigma—the repeated participation of the parents of children with disabilities in interactions taking the form of mixed social situations makes the context of mixed social situations permanent and present beyond the ever-developing interactional order of social encounters.

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Illuminating Existential Meaning: A New Approach in the Study of Retirement

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Abstract: Current discussions on the importance of retirement are largely built on statistical analyses of longitudinal data showing that well-being seldom changes from before to after entering retirement, but is rather mainly dependent on the individual's social resource position. In contrast, qualitatively oriented researchers underline that the retirement process is a complex life transition that needs to be further illuminated. To do this, however, we need to advance new theoretical and methodological perspectives. In this article, an existential sociology approach is outlined, emphasizing the multifaceted spectra of lived experiences and meaning-making in the retirement process. The phenomenological approaches of existential sociology allow us to consider how the exit from working life is created in the processes of motion rather than as expressions of static positions. A merit of this approach is that retirement as an empirical case may say something general about being in transition as a basic social condition. In the article, we discuss how a socio-biographical methodology, based on longitudinal qualitative interviews, helps us capture how existential meaning is formed and re-formed in the ambiguous situations which arise in similar life-course transitions. Theoretically, we especially draw on concepts from the existential anthropologist Jackson and the phenomenological tradition of existential philosophers such as Arendt and Heidegger.

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It's obvious that one has more time to reflect when retiring... Retiring is a kind of stopover to a new life... And that, of course, is a reminder that everything's finite. That's the way it is... It's, therefore, unavoidable. That's how it is!... On the one hand, it's the phase in itself; on the other, as long as you're working, you don't have the *time* to think about anything else... The more one works, the more involved one is, the less time one has for those second thoughts on what there is; but, as a pensioner, one has more time to do this. [George, former dustman aged 67 years, after the point of retirement]

In retirement research, existential meaning-making in the lived experiences of individuals, such as that expressed by the former dustman in the quote above, is often downplayed. Economic and demographic questions are instead at the center, such as how people in Western societies will be required to work longer (e.g., Reynolds, Farrow, and Blank 2012; cf. Biggs 2014; 2015). In Sweden, where we have conducted our research, the latter question is high on the agenda in politics, in the media, and among researchers. In late 2017, representatives from six political parties in the Swedish Parliament presented a political agreement to raise stepwise the lower retirement limit from 61 to 64 years of age and the upper limit from 67 to 69 years of age.¹ According to Norbert Elias and John

¹ Sweden, which has a system of mandatory retirement, previously had a fixed retirement age of 65, but a more flexible system was implemented in the new century. At the time of writing, the minimum retirement age is 62 and the maximum is 68; that is, at a 68-year limit, the employee will have to let go of his/her status as permanently employed, but has the opportunity to seek fixed-term employment in the labor market.

Scotson (1994), a researcher can easily respond instrumentally to similar politics by offering advice on the most efficient execution or, contrariwise, pointing to negative implications of these policies. Either way, other approaches to retirement than those on the political agenda can thus be made invisible, such as existential issues that are awakened in the transition between exiting occupational life and having a new everyday life as a pensioner. Existential issues, though, are essential for a deeper knowledge of how the individual handles welfare policy changes in the direction towards increased responsibility for their provision, for health, and life possibilities within the frame of a general human wish that one's life should be of importance in a wider existential context.

Retirement research often uses statistical analysis techniques to study antecedents and outcomes (such as health, well-being, and economic and psychological adjustment) of the transition and the post-retirement trajectory (Van Solinge and Henkens 2008; Muratore and Earl 2015). Data show that well-being and health seldom change after—compared to before—the entry into retirement, but instead mainly depend on the individual's social resource position from earlier life (Hyde et al. 2004; Halleröd, Örestig, and Stattin 2013). From this perspective, the social phenomenon of retiring is considered to have only a minor effect on the lives of human beings. However, we assert that qualitative methodologies and analyses are needed to capture intersubjective meanings of retirement that are not quantitatively measurable, but are still so noticeable when an individual leaves a well-known, habitual everyday for the new everyday of retirement.

Consequently, the aim of this article is to illuminate the issue of retirement from a qualitative method-

ological perspective and underline the existential meaning of the transition from an employee to a pensioner. Highlighting questions as existential means focusing on how the significance of life is always part of our choices, concerns, worries, and well-being. Existential questions could concern both ethical and social problems, as well as how we as social human beings handle the questions of life and death (Jackson 2005; 2011). In relation to retirement, existential reflections could especially involve choices and paths taken during a long occupational life, and the hopes and fears of what the future has to offer.

In this article, we primarily use theoretical arguments, emphasizing how the retirement process makes existential issues particularly noticeable. However, we also occasionally use empirical illustrations to clarify and concretize the existential issues pointed out. The presented existential approach was developed in a research project whose main data consist of interviews with 43 individuals in various professions, 35 of whom were interviewed in two rounds, both shortly before and after the point of retirement.²

The analyses of the interview data have shown that retirement can be regarded as a life situation in which questions about meaning, values, and belonging are particularly defined, as well as re-defined, according to how one perceives the past and the future. As George expresses in the quote above, the process of retirement can be a reminder

of life's finitude as a universal existential condition that is played out in singular life events (cf. Denizeau 2015).

We will argue that illuminating retirement from a qualitative methodological perspective can be fruitful when highlighting the existential meaning of the process. In relation to this, we point out some theoretical concepts when interpreting retirement from this approach. As the reader will see, we emphasize the multifaceted spectra of lived experiences and meaning in the retirement process and its "uncertain possibilities" (Jackson 2013:162). We capture these uncertainties/risks and possibilities with the concept *existential imperative*, which is taken from the existential anthropologist Michael D. Jackson. In addition, we have found the phenomenological perspectives of existential philosophers Hannah Arendt and Martin Heidegger fruitful. We especially draw on the idea of how human beings particularly become aware of their mortality in life situations when something is broken, missing, or left behind. However, in these situations, it can also become apparent that human beings have the possibility to start over and choose new life paths.

When we set forth a research agenda here to study how individuals manage uncertainty in life-course events, such as the retirement process, and present some essential theoretical concepts to be used as tools for capturing the existential and qualitative meaning of this, we will mainly discuss its significance from a sociological perspective. In the final part of the article, however, when we draw some main conclusions, we will also elaborate on how similar existential questions may be of importance in the contemporary political and social contexts mentioned above.

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A Methodology for Illuminating Existential Meaning

The main assumption in our approach is that of a multifaceted retirement process, encompassing a variety of experiences that can be understood in their complexity by highlighting the concept of existence (cf. Denizeau 2015). Highlighting existential issues is important when considering retirement. For many people, retirement is a life phase in which one's work identity fades away. Additionally, one's private-role identity can be threatened, such as when "[c]hildren have their own lives; partners pass away" (De Lange 2011:51). Studies show how existence as a pensioner fosters attitudes about not only the value of work, but also one's usefulness or self-realization. With the aging process, existential questions of the unpredictability and vulnerability of life may also be emphasized (Tornstam 2005; Holm 2012; Osborne 2012; Biggs 2014).

Even if statistical analyses have shown a declined impact of retirement on our lives, qualitative researchers still underline that regardless of when, and in what way, people retire, the process is an important life transition. From this perspective, there is a call for approaches studying the "complex, unfolding process" of retirement (Jonsson, Josephsson, and Kielhofner 2000:464) and illuminating experiences of retirement as "situated within individual histories and cultural contexts" (Luborsky 1994:411). In order to take on this challenge, however, we need a methodology, as well as perspectives and concepts that are helpful in framing such qualitative analysis. As sociologists, we have previously highlighted existential questions where life both ends and continues; for example, when one becomes a parent, enters the labor market, or loses a loved one (see, e.g., Flisbäck 2014a). In this research project, we continue

to investigate similar existential themes by focusing on individuals' meaning-making in the retirement process in a welfare society such as Sweden.

As the aim of this article is to contribute to methodological and theoretical approaches that can enable studies of the existential meaning of retiring, the empirical material analyzed within our research project is used only as examples and illustrations (for more detailed information about our empirical analyses, see: Bengtsson and Flisbäck 2017; Bengtsson, Flisbäck, and Lund 2017).

To say a few words about the empirical material: all interviewees had been employed and had retired in 2014 or 2015. In order to obtain a variety of professions, sectors, and activities, we focused on five groups: low-skilled, manual jobs; skilled jobs in the public sector; occupations dealing with abstract means; high-skilled professions mainly dealing with existential questions; and occupations within the creative industries.

A starting point for our research project is that retirement is a *phase* in which previous years are evaluated, at the same time that the coming years as "elderly" are considered in relation to existential questions (see, e.g., Holm 2012; Osborne 2012; Biggs 2014). To gain an understanding of how meaning can shift over time in this phase, the same individuals were interviewed both a shorter time before the point of retirement and approximately half a year afterward. A so-called *socio-biographical* methodology was used, meaning that social structures were analyzed through individuals' narratives (cf. Flisbäck 2014b).

The socio-biographical method has similarities to both life-history interviews and the life-course ap-

proach, the latter of which has been rather dominant in aging and development studies (cf. Alwin 2012). An advantage of all these methods is the analysis of trajectories by emphasizing both contextual factors and intrapersonal development (e.g., Elder, Kirkpatrick Johnson, and Crosnoe 2003). However, the socio-biographical method differs in its stronger focus on shifting meaning and existential themes (Flisbäck 2014a; 2014b). One benefit of the method is that it permits us to see how “internal” differences in each interviewee are displayed over time—in transition between different social milieus. In other words, the method makes visible how similarities and differences emerge *both within and between groups*, but also how meaning changes *within each subject over time* (cf. Braidotti 2011).

An increased interest in longitudinal studies within qualitative research has been described as “part of a ‘temporal turn’ within the social sciences” in general (Thomson and McLeod 2015:244). From this perspective, the method has several advantages. One is the ability to capture processes over time. Another is the possibility to follow individual life trajectories and to see how culture and meaning in social groups develop. In addition, the method can contribute to new interpretations of what social scientists regard as progress and decline in social life (Thomson and McLeod 2015).

While longitudinal qualitative interviews shed light on how cultural and existential meaning is formed over time, there are some inherent difficulties, for example, the opportunity to arrange a follow-up interview. The interviewees may be less interested if they have experienced difficulties in life and believe that life has not developed as they had hoped (Miller 2015). However, an eager existential sociologist needs to shape a climate

such that it will make follow-up interviews possible, even in difficult times. It is important that both joy and sorrow, chance and risk, initiative richness and defeatism are included in an analysis aimed at understanding how people deal with “existence” and the important breaking points of life. In relation to this, our interviewees have often been eager to talk about the ambiguities and setbacks in their lives. As emphasized by psychologist Erik H. Erikson, aging may bring forth a longing to summarize one’s life (Erikson, Erikson, and Kivnic 1986). In other words, telling one’s personal life story and sharing the enigmas of life may have an *existential reconciling* effect.

Follow-up interviews, such as the socio-biographical method, are important when studying the details of individuals’ existential dilemmas and life paths, but in a way that visualizes the links between the singular and the shared historical and social contexts. Similarly, Arendt described the importance of *good examples*, whereby the lives of individuals are transferred into universal cases. In her biographical study of Rahel Varnhagen, Arendt (1997) shows the value of detailed analyses of individual lives in their transferability in relation to her contemporary readers. And, as we will see, in a similar way, focusing on the lived experiences in a life-course event such as the retirement process can add something important with regard to what it means to be a human being.

A Phenomenological Approach

The methodology described above is found in Flisbäck’s (2014a) study of a group of female artists recurrently interviewed during a 14-year period, examining existential issues through the relation between work, loss, and family formation. The

study not only highlights the relation between work and parenting—common in studies of family life—but also includes the loss of relatives. Although the sociology of family life previously treated family, work, and time from a generation- and resource-based perspective, the parallelism of life's origin and finitude has rarely been illuminated.

The study on artistic careers and family life, as well as our study on the retirement process, are both built on the assumption that life and meaning-making are multidimensional. Therefore, we need to focus on how meaning-making in different social processes and social spheres is *inter-connected* (cf. Douglas 2010; Jackson 2013). This means that we are less interested in analyzing cross-sections of the social world—distributions or patterns at a given time—than in highlighting shifts in meaning-making over time. In line with this, our approach contains a *phenomenological* point of view that is open to the whole spectrum of meaning and, thus, does not *a priori* exclude any potential relation or aspect (Arendt 1978).

The aim of phenomenology is to understand human existence from the place or situation where human beings experience and face the world. It can be understood as a way to study the—often implicit—meaning that exists in our relationship to the world, and to explore the meaning horizon appearing at the sight of different objects (Heidegger 2008). To give an example, people in Sweden annually receive an orange-colored envelope by regular mail from the Swedish Pensions Agency. This envelope contains forecast information on a person's financial situation as retired, based on their accumulated taxed income to date. From a phenomenological perspective, the sight of this envelope refers to a whole context of meaning, such as concerns

and beliefs about economic (in)security and managing financial risks, the approach of old age, the individual's responsibility for making plans for their future, et cetera.

The example above tells us something important about how the meaning of existence is experienced when handling shared objects, common tools, and language in everyday life (cf. Heidegger 2008). From a phenomenological point of view, this means that the subject's perceptions of things are never separated from the world. Arendt (1978:19, emphasis added) calls this “the *worldliness* of living things.” This tends to be obscured in modern societies, often emphasizing the subject as autonomous and concealing the world as something shared.

From Arendt's (1977) point of view, in studies of history and society, there is a risk of overlooking the ambiguity and diversity of human lives. Many researchers are tempted to make abstract models and forget the *uniqueness* of human beings' lived experiences. Accordingly, for Arendt, the unpredictability of social life and individuals' life paths is the only thing that we, for certain, can say is typical of humans. Our interviews, both before and after retirement, show that there is great variation concerning orientations towards retirement. While some embrace the opportunities they have been given, others ask what the point is in finishing a life project that has solely concerned the sphere of work. In the latter case, the image of oneself as a future pensioner can be reluctantly formed. But, it is important to stress that one of the points of our phenomenological and existential methodology is to determine *how* existential meaning is formed and re-formed, and how individuals find new paths in the break with old routines and the meeting with new experiences.

In applying a phenomenological point of view, we diverge from some perspectives in aging and retirement research whereby human beings are conceptualized as rational, calculative decision-makers (cf. Wang and Shultz 2010). To object to such a view of human beings as weighing the costs and benefits of alternative choices to reach their goals is common in sociological research. It is less common, though, for sociological analyses of retirement to focus on how meaning is continuously formed and shifting in time and space. But, there are interesting exceptions to this, such as in a phenomenological study of reasons for having taken early retirement, in which Robertson (2000:66) emphasizes the “multiple and overlapping ways” the interviewees talk about their reasons for early retirement—in this way, the reasons are “fraught with shades of ambiguity.” Both Robertson’s study and ours indicate that the retirement process can be seen as a *critical case* for understanding the maintenance and shifting forms of existential meaning always inherent in life’s transitions.

By applying a phenomenological approach, we try to offer an approach to the study of retirement by uncovering existential issues that are more or less absent. This also requires attempts to transcend theoretical boundaries, similar to how Lars Tornstam (2005:29-30) describes the theory of gerotranscendence in the field of aging as an endeavor to “break free from the traditional, sometimes mythical gerontological presumptions” (of positivist and behaviorist origin) in order to seek “a fuller description and understanding of behavior and consciousness by elaborating the meaning that it has for the individual.” However, while Tornstam’s objective is to present a developmental theory of positive aging, we illuminate retirement as an *external event* that acts upon people, conceptualized as what Jackson has framed as an existential imperative.

Retirement as an Existential Imperative

Hitherto, we have emphasized the need to illuminate meaning-making in the retirement process in terms of an individual existential quest. As seen in a review of two decades of retirement research (Wang and Shultz 2010), studies have usually dealt with issues such as early retirement, retirement planning, retirement decision-making, bridge employment, retirement adjustment, and post-retirement health and activities. As stressed above, our objective is instead to illuminate the “shape-shifting” of meaning throughout the retirement process. A similar idea is found in a study by Jonsson, Josephsson, and Kielhofner (2001), which shows how the meaning of activities can shift when the former clear boundaries between work and leisure time have dissolved in the transition from employment to retirement. Jonsson and colleagues (2001:428) describe the shifting meaning one interviewee ascribes to going to his summer cottage after retirement:

Before retirement, going there allowed him to escape the demands of the workweek and to rest and relax; it was a well-earned retreat before the next period of work. But once he no longer worked, going to the cottage did not feel the same. The joy of relaxing and well-earned rest was, to his surprise, no longer present. It no longer had a relationship to another part of his life.

The participants in the study by Jonsson and colleagues depict the transition from work to retirement as being more complex than they had expected. The main reason for this is that both the job and leisure activities took on new meaning when they became part of a new pattern of life in the process of exploring a new everyday. In other words, the

meaning of the practices changed when the relationship between the different life spheres shifted over time.

Traditionally, when the shift of meaning in people's lives in relation to retirement has been explored, it has been described as a "rite of passage" (cf. Atchley 1976). A main theoretical contribution by the anthropologist Arnold van Gennep is his conceptualization of life in terms of various passages in which it changes form and condition (e.g., birth, social puberty, marriage, and death). Van Gennep's (1960) examination of life-course events, and their accompanying ceremonies, led him to develop a threefold classification of rites of passage as activities symbolizing separation, transition, and incorporation. The transitional phase, consisting of so-called "liminal rites," is of specific interest here in our theoretical elaboration on the retirement process.

The anthropologist Victor Turner (1974:232) describes the second, transitional phase in terms of the "liminal period," whereby the person "becomes ambiguous, neither here nor there, betwixt and between all fixed points of classification; he passes through a symbolic domain that has few or none of the attributes of his past or coming state." Liminality, thus, refers to a state that is set apart from social structure and its accompanying statuses and roles. We could call it in-between social structures. In other words, people are situated in an interval between fixed structural positions, so that when they move into the third phase, they re-enter the social structure in which "the units are statuses and roles, not concrete human individuals" (Turner 1974:237).

However, to better understand the "workings" of the retirement process, lived reality must not be

reduced *a priori* to a system of roles and symbolic representations (cf. Denizeau 2015). Thus, we should more seriously take into consideration the meaning-making activities of human individuals of flesh and blood. Even if Turner's notion of liminality offers an important view on circumstances in which people may reconsider and contest socio-cultural values and make symbolic orders visible, transitions imply more than this. With the concept of existential imperative, Jackson (2015:174) launches a perspectival shift: there exists, according to Jackson, "an ontologically 'primitive' imperative to act in some way or the other in response to the actions of others or the world at large—to be a who rather than merely a what." As life is more than bare survival, people are in a constant *struggle for being* against forces beyond their control in order "to possess a sense of themselves as actors and initiators" (Jackson 2013:14; see also Jackson 2016). Inherent in all transitions, according to Jackson (2011:xi), is the promise or hope of something else, a "sense that one may become other or more than one presently is or was fated to be." But, that which offers hope and a new beginning could just as well turn into anxiety and discontent if one's hopes are dashed or one does not believe one's dreams can be realistically fulfilled.

This double-sided nature of life transitions may become more pronounced in more directly life-threatening situations, such as natural disasters, war, or poverty. When we argue here that this is also the case in the retirement process, the point of emphasis is *separation*—the person is retiring *from* employment, but what they are retiring *to* is more uncertain (cf. Atchley 1976). This unpredictability can bring forth individualistic strategies for managing everyday life, following Thompson (1993:685, emphasis in original), as the everyday of

retired people is no longer structured by common activities like work or regular education, which means “they *must* choose; responsibility for structuring their lives is uniquely their own.” Thus, the retirement process can be seen as decoupling from a collective context and, like other individualization processes, can be interpreted as a life transition whereby questions of meaning and quality of life become particularly prominent (cf. Frankl 1988; Giddens 1991). That is, as individuals are acted on by powerful external forces—for instance, in Sweden, the mandatory institution of retirement—they may experience a loss of control, but a belief may also arise that it is possible to arrange their life beyond the given directives, customs, habits, and regularities. Accordingly, existential imperatives include the potential for change and the redefinition of former meanings, values, and beliefs. However, a main empirical question is whether or not new possibilities will be initiated by the pensioners in their struggle for a viable existence, depending on whether they feel life is worth living or are strained by feelings of meaninglessness or a lack of resources (cf. Jackson 2005; 2011).

Existence within Limits and the (Possibility to Mark the) Right to One’s Own Life

Existential imperatives should be seen as life situations when existential questions tend to be awakened or reinforced as the limitation in time and space becomes apparent to the individual. In his fieldwork performed in Sierra Leone, Jackson has often analyzed existential imperatives in the light of losses resulting from civil war and starvation. But, other types of life situations can also lead to existential imperatives, such as when we exit occupational life and put this everyday behind us to retire. One aspect that can be palpable in the retirement pro-

cess, understood as an existential imperative, is the negative effects of wage labor. When another everyday is possible, the experience of being subordinated and exposed in working life can be reinforced. This is the case with the dustman called Olle, who in strong words expresses his relief at being a pensioner, where the best thing about this new everyday is being released from the early rising that was part of his job:

this with the alarm clock in the morning, that one could feel sick about towards the end.

In the existential imperative’s experience of the possibility to leave the disciplinary nature of wage labor, retirement may become an opportunity in life when the driving force is even stronger to mark the right to one’s own life. This is the case for Jan, who also worked in the recycling industry, but at a recycling station. For several years, Jan felt dissatisfied with work, which was related to changing working conditions. But, he did not express this dissatisfaction before the retirement process. At an informal farewell ceremony in his final working week at the recycling station, he took the opportunity to express his dissatisfaction. When asked by his manager to work temporarily in his new everyday as a pensioner, Jan manifested that he did not want to set his foot in that workplace again:

“Jan,” he said. “I ask you, can you imagine working after you’ve stopped working here?” he said to me. “No,” I said, “I can’t imagine doing that,” because I was a bit bitter then.

Being situated in vulnerable and marginalized positions has been described, by Jackson (2005), as a tangible experience of being drained of life energy, lacking the effort to change one’s situation. The vul-

nerability is related not least to lack of resources. As emphasized by Jackson (2015:170, emphasis in original), a scarcity of material goods translates (in existential terms) “into a sense of being socially *without*.” However, in similar situations, human beings rarely accept their current circumstances, but rather hope and dream for a better future. They sometimes even place their hopes in a magical or divine intervention (Jackson 2011; 2013).

Within the frame of an existential imperative, the individual can gain the power to *try to recapture* the right to their life that they believe they have, as in the case of Jan. Sometimes the build-up of power can even be experienced as a final attempt, driven by this universal human longing to be an actor in one’s life circumstances (Jackson 2005). In Jackson’s line of reasoning, while the yearning for something else is a universal human characteristic, the realistic possibility for a changed life situation is circumscribed by social conditions associated with different forms of capital. Human beings, in Jackson’s (2011) terms, always live their “life within limits.” Like Jan, we can object to a particular situation, but this is not the same thing as having the power to change it—even if the existential will to “improve” our conditions is something we all experience.

The experience of material scarcity and its effects on meaning-making seem to be prominent in the retirement process. George, the former dustman quoted in the introduction, describes—in contrast to the other interviewed workers in the recycling industry—the retirement process as less meaningful. Even though he has a large family, he regards work in general as the most important practice in life. From his perspective, work is a way of shaping an image of yourself as a human being, since as

a worker you are useful to your fellow man. However, the only potential source of meaning in the new everyday George was able to see before he retired was to travel to a warmer country in southern Europe. Below, before retirement, he expresses a longing to “leave the cold and the slush” in Sweden. His desire can be understood as a will to leave some of the things that he, after all, saw as negative in his old way of living—for instance, the experience as a dustman of having snow- or rain-soaked shoes:

Gran Canaria is amazing...That’s something I *do* like... Yes, I do like *that*... The first half-year as a pensioner, then it’ll be winter... Then the plan is to travel [with his wife] down to the Canary Islands.

Four months after retiring, when George describes his new everyday, it is relatively meaningless. Now, he cannot serve any real function in society, and the only source of meaning that he saw before retirement—traveling to the south of Europe—does not seem to be economically feasible:

We [George and his wife] like *that*, going traveling, and such things, but it’s true that even *that*’s affected. It’s not just a matter of simply traveling, anyhow, because it’s expensive.

George longs to visit warm places, but is unable to do this due to his finances. This can be interpreted as a metaphor for the discrepancy between what we *are* and what we wish *to be*, that is, the existential mood that Jackson (2011) asserts distinguishes all human beings. In other words, George’s case illustrates “the mystery of existential discontent—the question of why human beings...are haunted by a sense of insufficiency and loss” (Jackson 2011:xi). The example underlines that a sociological perspec-

tive, illuminating the existential meaning of the retirement process, must focus on how individuals' struggle for being is related to social contexts of difference and inequality (cf. Thompson 1993).

An End and a New Beginning

Longing for a new situation and the possibility to mark the right to one's own life after having been in the hands of others is, thus, a possible effect of retirement as an existential imperative. But, to understand why the specific driving force is accentuated in the retirement process, we need additional concepts that can capture the *existential mood* that can be brought forth. In other words, the concept of the existential imperative is important for comprehending existential dilemmas that may be at stake in the retirement process; but how can we gain a deeper understanding of *why* the willingness to speak up, as in Jan's case, can be strong in relation to the point of retirement?

In our analyses, it has become evident that the retirement process is an essential breaking point in life that can reinforce an individual's thoughts that they have a limited number of years left to live (cf. Marshall 1986; Holm 2012). For example, Jan's wife, Ann-Marie (a former preschool teacher, who was also interviewed in the project), stresses that in the retirement process, life's limitation in time and space has become apparent. As she sees it, this experience is less positive. When friends and family sometimes express jealousy, since Ann-Marie as a pensioner has "escaped work", they do not understand that for her the process also has meant a loss of youth and looking back at things past. In the interview, she explains that both she and her husband, at the point of retirement, were so strongly reminded of this:

Well, now we have all these years behind us, and only a few years ahead of us!

When Ann-Marie describes her insights, she compares retirement to crossing a border:

Now it feels like one has one foot on the other side.

To capture and illuminate similar existential experiences, we have leaned towards the phenomenological ambition to find new aspects of meaning-making in everyday life, when the unfamiliar is sought in the familiar. In Heidegger's terms, we can talk about a feeling of *being-toward-death* (*Sein-zum-Tode*) being accentuated. The "reminder that everything's finite," as George expressed in the first quote of this article, has produced an understanding that man is not the "master" of his life. According to Elias (1985), such insights are often neglected in modern Western capitalist societies as finitude is turned into an abstract, statistical probability, and death is seen as an abnormal diagnosis unrelated to everyday life. In relation to our example, this means that experiences of the retirement process may entail that death—as a lived existential condition—are often made into experiences of "they" (*Das Man*), to speak in Heidegger's (2008) terms. Most likely, this is why some aging studies have called for approaches whereby life and health issues are studied in relation to existential meaning-making and spirituality (Kimble 2002; Tornstam 2005; Dalby 2006; Biggs 2014).

Making space for existential issues in the retirement process is not only due to a more tangible situation of being-toward-death. It also occurs when one has more *time* to reflect on one's existence, as described by a doctor called Jens in our study. In the final year before he planned to take out his entire pension, he has gained time to reflect on his life by taking out

a part-time pension. He thus has more free time to philosophize over the retirement process:

to philosophize over what it means to be a pensioner, and to make a transition.

At the same time, according to Jens, the farewell to work is experienced as “a divorce” or even “dying” because it is so “definite.” For Jens, the transition seems to have created an existential mood.

To sum up, in the event of saying farewell to work a feeling of being-toward-death may arise, and the process may also give space for reflection and make visible different meaning contexts of which the individual is a part. Following Heidegger (2008), a wider meaning context may be revealed in the cleft between familiar places. From Jackson (2005), we have learned that this cleft may be a breaking point—an existential imperative—that gives rise to resistance and the formation of new existential meaning. However, if it is hard to find existential meaning in the new situation as a pensioner (as in the case of George), this may also lead to *existential frustration* (Bengtsson and Flisbäck 2017; cf. Frankl 1988). In other words, allowing space for something new is always intertwined with giving up something else, such as meaning-making in, and through, work. Therefore, we need to conceptualize lived experiences in the retirement process as containing both loss and (re)birth, endings (such as exiting employment and its specific conditions), and new beginnings (such as starting a new everyday as a pensioner).

As noted, we are inspired by Heideggerian thoughts, such as the idea of existence (*Dasein*) as something unfixed and, thus, containing unpredictability and opportunities. For a sociologist, this idea might be more comprehensible in Arendt’s historical and po-

litical studies, since the analyses are done in relation to concrete cases.³ Following Arendt (1998), the unpredictability of human actions is persistent in our always fragile life contexts. The Arendtian assumption that the most characteristic aspect of human existence are openness and uncertainty challenges the common idea in the social sciences—not least sociology—that human actions ought to be explained in terms of institutional regularities or cultural and structural representations.

Neither Arendt nor we deny that social life consists of regularities; but we do emphasize that individuals, throughout life’s unpredictable twists and turns, may start anew and see the world differently. Life may take other directions, which Arendt (1998) calls a *second birth* (cf. Erikson 1972). Or, following Vasterling (2007:89), Arendt strives for “understanding real life” as being “without closure.” For the sociologist studying the end of occupational life and the beginning of retirement, this is, of course, an exciting thought.

Towards an Existential Sociology of Retirement

Alongside theoretical inspiration from Jackson, Arendt, and Heidegger, our approach joins existential sociology. This sociology approach originated in the US in the 1970s, where some sociologists criticized mainstream sociology for excluding the ambiguous aspects of everyday life in favor of an “objectified or absolutistic view of man and society” (Manning 1973:200). Inspired by existential psychology and philosophical and literary existentialism, existential

³ Vasterling (2007:85) points out Arendt’s influences from Heidegger, but underlines differences concerning form and production: “It is the commitment to understanding phenomena and their underlying experiences, rather than concepts, which defines Arendt’s phenomenological attitude.”

sociology was elaborated to illuminate the richness of human experience and issues of the ambiguity and vulnerability of life.⁴

The existential sociologist Jack D. Douglas (2010) argues that the existential sociology perspective not only understands how individuals solve ambivalence, but also examines experiences of meaninglessness and incomprehensibility. The researcher should be *open* to the entirety of situations and experiences people find urgent in their lives: “Nothing about man in society is irrelevant to our study; nothing about what is truly important in his life is prejudged or predefined” (Douglas 2010:4). Adopting an existential sociology approach in the study of retirement, therefore, is to embrace an alternative point of view: shifting attention from regularities towards transitions and ambiguities as the basis of life itself.

An important assumption in existential sociology is that specialization (in social fields such as work, family, etc.) is not the main road to follow, but that the researcher should instead try to analyze *links* between phenomena in various social fields in order to seek the entirety of aspects people may find meaningful (Flisbäck 2014a). Existential sociologists are mainly interested in issues related to fundamental life choices, passions, commitment, and perceptions of bodily changes, and death. Often, they tend

to examine how unpredictable actions arise out of people’s longing for love, trust, dignity, recognition, and respect, or from their attempts to free themselves of power relationships (Kotarba and Johnson 2002; Douglas 2010).

A central idea of existential sociology, in other words, is that we need to put together all these various existential experiences of the social world and try to understand it in a broader context and over time. A similar approach is found in existential anthropology. In an introductory chapter on this approach, Jackson and Piette (2015:3) criticize the fact that the multifaceted, complex, mutable, and vibrant nature of life tends to be forgotten in the social sciences in general when lived reality is reduced *a priori* “to culturally or socially constructed representations.” By contrast, both existential anthropology and existential sociology emphasize the need for theory and methodology that are able to capture the concrete varieties of meaning in the fragile lives of human beings.

Thus, both research traditions call attention to the notion that “the existential” content of lived reality—the fundamental “precariousness of presence” (Jackson 2005:xiv) or vulnerability of the human condition—tends to be reduced to something else. For example, sociologists have often conceptualized religion and religious experiences as social practices or ideational systems that give rise to emotional or cultural forces experienced as something greater than the individual self (see, e.g., Durkheim 1995; Alexander and Smith 2003; Collins 2004). However, following Jackson and Piette (2015), being a socially situated human being has an extended meaning *beyond* maintaining social practices or ideational systems. Inspired by the religion psychologist William James, Jackson and Piette state that God may be seen as an idea to which the self turns in order

⁴ The existentialist viewpoint includes a diversity of perspectives, as well as writers and philosophers who do not accept the term in itself (Kaufmann 1969). If, nevertheless, an attempt is made to summarize some existentialist starting points, a common interest involves approaches to life and death, fear and anxiety, perceptions of coercion, and the issue of man’s freedom of action. What is also characteristic of the “spirit of existentialism” is that all human beings are seen as “concrete individuals of blood-and-bones creating their ways through a world in which meanings are highly problematic and situated” (Fontana 1980:155-156). Thus, common to many existentialists is a phenomenological point of view (Kaufmann 1969).

to transcend oneself. This can be understood as an existential driving force that makes life about more than simply the here and now. Thus, religious life can be analyzed not only as an external social force or as a metaphoric, cultural dividing line between the sacred and the profane. “The will to believe” (James 1912) can be interpreted as an expression of the existential struggle we have seen springing from the individual’s hopes and fears about life taking new directions.

A similar transcendent quest may arise in the lived experiences of the retirement process, whereby the self harbors doubts with regard to future possibilities, but simultaneously longs for another existence. Let us finally illustrate this with an example from one of our interviewees, called Anna-Britta, a librarian working with information and books for younger children. Her story exemplifies how existential meaning can be (re-)formed in the retirement process.

We have interpreted Anna-Britta’s retrospective account of occupational life as an orientation to work as a *calling* (cf. Bengtsson and Flisbäck 2017; 2020). To serve a higher cause—one’s fellow man or the community—one of her most important duties has been to increase literature reading among resource-poor children. Moreover, her desire to make a difference was seen in the impact her committed work had on the parents of these children:

I’ve made them go to the libraries. Many of the parents had never visited the library before.

However, experiences of a constant shortage of time and increased administration work in her job over time have made Anna-Britta see the benefits of leaving work:

There’s so much putting books back on the shelves and so much administration to handle. And that’s something that’s pretty hard. So that part of the job, I won’t miss it [as a pensioner].

According to Anna-Britta, these burdens compete with the duties she regards as truly important, such as meeting the children and their parents and introducing them to the world of literature and fairy tales. In relation to presenting books to school classes, she says:

You know, all the energy you get from talking to the kids, I can’t describe it!

The quotes above exemplify how Anna-Britta, through a passionate commitment to a cause, in Max Weber’s terms, has *lived* for her work, that is, made work her life “in an *inward* (*innerlich*) sense” (Weber 1994:318, emphasis in original). Her work orientation illustrates the importance—for a sociologist—of not excluding the existential and religious aspects of life, here metaphorically understanding work and life as a struggle to find and listen to callings. This is of significance not least since understanding work as a calling also leads us to see something about the contradiction that people can feel trapped in concerning the demands of their current working life. For Anna-Britta, the increased burden of tasks such as administration becomes an obstacle to achieving the higher cause of making a difference for others. Thus, she has started longing for another existence, to be something other—or even *more*—than she experiences is possible in her current occupational practice. In other words, in the potentially “second birth” of retirement, Anna-Britta has begun listening for another form of calling—not least from the private sphere.

Before the point of retirement, Anna-Britta hopes she can engage more fully in her grandchildren, but

also hopes to have more time to reflect and to translate her creative potentials, such as writing stories of her own. This is something she has felt has been lacking in her former life. In this way, the lived experience of the retirement process has resulted in what we can describe as a form of existential reconciliation that makes it reasonable for her to leave a former calling and emphasize future possibilities in a new phase of life. But, this is not always the case, as Douglas underlines in his existential sociology perspective: often, existence only offers enigmas and not settlements. However, Anna-Britta's example shows the importance of not ruling out the *existential implications* of the social institutions of modern life, such as retirement.

Conclusions

The aim of this article has been to outline a qualitative existential approach in the study of retirement, emphasizing the multifaceted spectra of lived experiences by studying retirement as a process whereby meaning is continuously formed and re-formed. This transition may create a state of ambiguity that can be experienced and managed as both a risk and a possibility. To capture this, we have emphasized the importance of *phenomenological* interpretations of the world as a shared meaning context, though always (re)interpreted and experienced in a unique way from the place where one is situated. The phenomenological approach allows us to consider how social life is created in the processes of *motion* rather than as expressions of static positions. In line with this, it is necessary to employ a qualitative method that follows the transition of the individual through time. In the research project, we used a *socio-biographical method*, a qualitative longitudinal method specifically focusing on how existential meaning is created and re-created over time, before and after retirement.

An issue in previous research is whether retirement should be seen as a decisive change in the individual's life, or if past life patterns are more decisive for how the process takes shape. We suggest an approach that asks the question differently since neither the assumption that nothing happens nor the one that the retirement process is a main shift take into consideration that life and existential meaning are continuously being formed. However, focusing on forms of meaning-making in the retirement process can be particularly interesting because individuals are leaving the shared meaning context of work. What the future may bring is now more open than previously, at the same time as the new everyday can offer more time to reflect upon the years that have been left behind. With the concept of existential imperative, derived from Jackson, we have tried to capture displacements in meaning that the retirement process can create. We have even pointed to how retirement as an existential imperative can offer possibilities for resistance.

Following Heidegger (2008), individuals always relate to their future possibilities. This means that, besides the ability to start anew, it is also inevitable that all living creatures will one day die. So the possibility of a *second birth* is, at the same time, a *being-toward-death*, expressed in *Dasein*, whereby the essential characteristic "resides in its understanding of itself as mortal" (Denizeau 2015:223). We experience the meaning of these parallel aspects of the human condition daily when events pass and are followed by others. But, in certain situations, this existential condition is particularly pronounced.

In this article, we have only touched on the results, but, still, our empirical illustrations show that the retirement process provides a practical sense and understanding of life as parallel beginnings and

ends—second births and being-toward-death. A reason for this is that exiting employment is a situation that is imprinted with various degrees of uncertainty; we leave something behind as we move towards something new. Our suggestion is that the ambiguity of existence is even more prominent in the retirement process since it is a life event that breaks one's daily habits and because the event involves such a concrete experience of both an end and a new beginning and, therefore, may be an important existential imperative. From this perspective, we hope this article will not only be read as a proposal for a perspective and a methodology when studying the retirement process; for those interested in the existential dimensions of social life, retirement can also be seen as a *critical (empirical) case*, whereby particularly existential meaning aspects appear.

One essential aspect of the socio-biographical methodology is the analysis of social structures through individuals' narratives and existential meaning-making. In the research project, we have studied how women and men, with various experiences of occupational life and economic and social resources, exit Swedish working life through the mandatory institution of retirement and how they create existential meaning in their new life within the limits of structural conditions. In the analysis of the empirical data, we have linked how individuals shape and transform existential meaning against the background of social institutions, resource structures, and norms (cf. Bengtsson et. al 2017; Bengtsson and Flisbäck 2017). Here, the raised retirement age in Sweden, mentioned in the introduction, is interesting. As Jackson (2011) emphasizes, our attempts to create meaningful lives always happen *within the limits* of resources.

The Swedish pension reform is essentially part of the strong social norm and political principle of “the

work strategy” in Swedish welfare politics, that is that one has an extensive responsibility to provide for oneself through gainful employment before one is eligible to receive social benefits. Even though this principle has long been decisive in the Swedish welfare model, it has been amplified in the new century (cf. Bengtsson 2014). From an existential sociology perspective, the increased responsibility for self-sufficiency higher up in the ages is interesting, as similar policies also set a limit for individuals' meaning-making (cf. Moulaert and Biggs 2013). The raised retirement age will likely be of great importance to those who regard their work as a calling, a life task that can hardly be completed in an easy way at some specific point in time, such as upon retirement. At the same time, we need to reflect upon what similar requirements to work longer might mean to those who cannot live up to social norms of being an active and productive individual in old age (cf. Ekerdt 1986; Katz 2000). How will these individuals, who cannot find a job due to issues such as sickness or ageism, create a life that they find meaningful, but that contrasts the norm that people should work longer? Additionally, how will similar resource-weak groups of the population find existential meaning in old age if they live under economic duress?

However, an important notion of our existential sociology perspective on retirement is that what a human being is, as well as what searching for meaning includes, cannot be predetermined (cf. Douglas 2010). Resource structures are only *one* aspect of the relationships out of which meaningful aspects of retirement emerge. Thus, it is important not to revert to a simplified picture in which capital accumulation results in greater life opportunities while capital loss results in difficulties. Losses—even of capital—can sometimes bring to light new meaning dimensions, resistance, and new directions in life.

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