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Articles

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The Process of Becoming a Hatha-Yoga Practitioner[1]

Abstract   This paper undertakes the problem of perceiving and feeling the body in the process of acquiring the identity of a hatha-yoga practitioner. The process of becoming a "yogi" is connected with the practice of the work on the body and defining these practices, specific perception of the body, and feeling the body.

Becoming a hatha-yoga practitioner is a process. I describe phases of this process in the paper: 1) The initial phase—constructing motives and first steps; 2) The phase of a fuller recognition of psychophysical effects and ascribing to them appropriate meanings; 3) The phase of a fuller recognition of spiritual aspects of hatha-yoga (quasi-religion). The relations between the mind and the body get complicated at the moment of meaningful engagement in yoga practice and defining body practice as mental practice, as well as spiritual. The work on the body can change the "Western" perspective of defining the body as a material element of human existence (the Cartesian vision) to a vision of treating the body as a spiritualized substance (the vision of Eastern philosophy). Such a change is not always possible if we hold on to the guidelines of other religions as own (e.g., the Catholic religion). Changes in the body and psyche have to be in such a situation defined differently, and also there have to be certain language descriptions of these changes (often acquiring guidelines of set languages formulas) in order to combine the statements of conventional religion with a new spiritual experience.

Keywords   Symbolic Interactionism; Body; Corporeality; Hatha-Yoga; Yoga Practice; Religion; Spirituality; Para-Religion; Process of Becoming; Identity Construction

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In the paper, there is an introduction to a description of the world of social practices of hatha-yoga, rules that govern it, motivations of those who practice it, and their definitions of situations, which they find themselves in the process of becoming a yoga practitioner. The formal reconstruction of the process is a second order construction that is based on the accounts of the process by the practitioners of hatha-yoga. The language of the practitioners is a vehicle of meanings that is ascribed to hatha-yoga practice. However, the author's account of these meanings has a theoretical character.

Yoga is becoming a more and more popular form of exercise. The research of the fitness market in 2010 shows that yoga is, among the biggest fitness clubs in Poland, in the third position in their offer: 1) strengthening classes, aerobics (100%), 2) strength training (98%) and personal training (98%), 3) yoga (88%) (Nelke 2010). Yoga is somewhat inscribed in the context of fitness. In Great Britain, it is so with the support of the government. Yoga was taught in the 1970s in the College of Physical Education, part of the Inner London Education Authority (Hasselle-Newcombe 2005:305). It is estimated that around the world about 1 million people are regularly practicing yoga, and in Poland, around 30 thousand. Women express their will to practice yoga more often (see: Górski 2004).

The empirical data were gathered in the research (to describe the process of becoming the hatha-yoga practitioner) by using the unstructured and narrative interviews with hatha-yoga practitioners, although there were also interviews done for comparative purposes with people practicing yoga-ashtanga. These interviews and their transcriptions are the data of the analysis of the process of becoming a yoga practitioner, though participant observation and autoethnography were also used as the additional sources of data. I used the symbolic interactionist theoretical approach and grounded theory procedures to analyze empirical data (Becker 1982; Strauss 1987; Clarke 1991; Prus 1996; Strauss 1997).

Described in this publication, research on doing and practicing yoga started with participant observation done in one of the yoga schools in a major regional city (from 2007 to 2011), where the researcher took part in the class at least once a week. The researcher was also an observer of an outgoing yoga school four times—during a week-long trip to the mountains, where, in seclusion, yoga was practiced for seven hours a day, and additionally there were meditations and mantra singing (in 2008), as well as during three-day training trips, where classes were also intensive, all day long with a 4-hour midday break (plus evening meditations; in 2008-2009). The researcher was then an active participant of the world he researched. He dwelled together with the participants of the research, practiced hatha-yoga according to the teachers' recommendations. His psychological and physical sensing of the practice had an influence on asking questions during the research process.

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[1] This article constitutes an offshoot of research dedicated to hatha-yoga practice and is, to some extent, based on data included in a research paper "'Ciało świątynią duszy', czyli o procesie budowania tożsamości praktykującego hatha-jogę. Konstruowanie prywatnej quasi-religii" (article in Polish ["'Body as the Temple of the Soul'—The Process of Building the Identity of Hatha-Yoga Practitioner. Constructing a Private Quasi-Religion"]), which was released in *Przegląd Socjologii Jakościowej* in 2012 (vol. 8, issue 3). This version, however, puts an accent on the process of becoming a hatha-yoga practitioner.

It can be said that during the group practice, there was co-sensing with others of everything that was happening in the exercise room. Co-sensing was connected with the work on the body while performing hatha-yoga positions, receiving instructions about performed positions, during mutual meditation, or group mantra singing, which also causes both bodily and psychological sensations. During common practice, through the observation of one's feelings and undertaking different roles, there was interpersonal empathy appearing, which allowed the researcher to come to certain meanings ascribed to hatha-yoga by others. The feelings of the researcher were thus helpful in the interpretation of the data obtained from other—basic—sources, that is, interviews, observations, and visual materials (photographs and video recordings of hatha-yoga practices). The sole participation in the world of practicing would not be enough for the researcher to understand bodily and mental sensations appearing during the practice.

During the research, apart from 200 observational photographs, 6 video recordings of yoga practices were made. There were also 60 interviews, including 13 narrative interviews, 38 unstructured, and 9 based on films. Among the interlocutors were pupils, students, working people, and yoga instructors, both males and females. Interviews were conducted in 2008/2009 by the students of sociology (from the University of Lodz). The author has been running a participant observation from 2007 till the current moment. Additionally, in 2012, 172 websites of yoga schools in 38 cities in Poland were analyzed in order to examine the strategy and auto-presentational tactics of given schools.

Photograph 1. Practice and participant observation by the author in Helenów Park—practice with Erasmus students (course Meditation for Managers, academic year 2014/2015).

Source: Photograph by Kamil Głowacki.

Introductory Phase—Motives Construction and First Steps

In this paragraph, I will describe the dynamics of the process of becoming a practitioner. The introductory phase consists of three substages: a) constructing motives; b) first steps—the beginning of the practice; c) noticing the effects.

Constructing Motives

The language of motives initiates the process of identity formation. Sometimes some people believe that the decision of taking up yoga was intuitive, but

this conviction is expressed in language. They knew for themselves that they had to do yoga. Hence, for this group of people, there are no motives that one had to become aware of at the very beginning of the practice or just before starting it.

> So, my adventure with yoga started when I was 17 years old and it was an intuitive decision. So I knew nothing about it, I did not read, I just felt that I should attend yoga classes not even knowing what it was, and walking down Politechniki Avenue and I saw an invitational poster to such a class and just like that, in t-shirt and jeans, I went in and stayed 'til today. It has been years since that day. (yoga instructor)

We can add here that, apart from intuition, the poster advertizing yoga classes played a major role in making the decision.

One can decide to start practicing yoga because it is popular or in fashion that one can notice observing friends:

> I have been doing yoga for a year now. To be honest, I took it up because of its popularity; one can even say that it is in fashion now. Well, yes, I had no special health issues and a lot of people take up yoga because, as I know, they want to stretch, et cetera … A lot of my friends started practicing yoga, they kept on talking about it. I also wanted to be able to say something about it, be able to say that I do it, too, that I know how it is. (practitioner for a year)

It needs to be underlined that the motives are often constructed *ad hoc* and *in situ*. Experienced practitioners (e.g., 10 years of practice) do not remember

what their motives were at the beginning, when they started practicing yoga.

Sometimes practicing yoga starts in a difficult moment in the life of the individual. The individual had hope that through yoga s/he will solve their problems; in the interview cited below, it is not stated what problems exactly are mentioned, however, from further parts of the interview, we find out that the interlocutor was emotionally unstable[2]:

> And … and … I started practicing in such a moment of life, where I started such a huge work on myself and my character, my life. I raised myself up from such a ditch and it gave me so much, really. I mean, it was not the only reason that helped so much, but … um … um … it really brought a lot into my life, that is why I felt that … that I have to continue, and now it is, it is my natural part of life, right? Although, I still feel that it's not enough because this everyday life disturbs. (practitioner for 5 years)

Most often, the motives are reconstructed during the interviews and passed on to the researchers by the practitioners. The motives for practicing yoga often

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[2] It resembles a situation of entering sects by people going through some life troubles. It is often emphasized that this entering is the result of some drama and personal problems of the individual. People, for example, leaving prison can come across sect members that are supposed to help them (see: Wilson 1992:184-185). What is more, many people can go through family problems because the sect offers them a new view on the world and allows them to regain self-trust (Wilson 1992:186). Of course, the sect offers emotional support and friendly relations, shows how unimportant the current social statuses are, and shows the "ultimate truth," et cetera (Wilson 1992:186-187). The sect members learn from one another the motives for participation and/or the ways to express them. The descriptions come from group participation. Remembering the moment of conversion is connected with acquiring the language that helps to talk about the conversion (Wilson 1992:200). It does not mean that I consider yoga practitioners as members of some sect; however, some psychological dynamics and participants' motivations in such societies, institutions, and classes can be, at times, similar.

show when comparing yoga with other physical exercises, they are somehow worked out in the process of "comparing justifications," when we compare, for example, yoga with aerobics, showing the advantages of the first (the language of aesthetics of the exercises in yoga). There is present somewhat an arena that singles out yoga from other physical exercises (there is commonsense theoretization on an individual level).

The motives for yoga practice can be different and coexist with each other at the same time. With exercise there are new motives appearing, allowing them to justify the sense of yoga practice (e.g., that it is a form of mental training). The motives thus show up not only at the very beginning of practicing yoga but also later, in different moments of doing or practicing yoga. The development of motives has then a processual character. The initial motives for practicing yoga usually are:

- body training (stretching the muscles and/or strengthening them; body relaxation; treating yoga as sport; keeping fit; getting slimmer; its slenderness, flexibility, and nimbleness);

- health effects (the aim is to improve the state of health);

- aesthetics, harmony of exercises;

- identity motives (yoga is treated as a niche sport or an alternative source of entertainment; looking for some occupation that singles out the individual from the surrounding—it is a singling-out-from-others way of spending free time).

The latter motives that show up with time together with practicing yoga are:

- visible physical benefits, as well as health effects of yoga (visible improvement of health condition or curing from different ailments);

- the peace of the body and mind (quieting of the mind);

- positive influence on the psyche/mind—mental training (type of meditation, acquiring distance to the world, getting a new perspective of seeing the social surrounding, getting energy, etc.).

The abovementioned **body training (work on the body)** is a category encompassing the whole group of motives that are mentioned most often in unstructured interviews and narrations.

Below, the interlocutor mentions many above-listed types of motives. Reconstructed during the interview, different motives can be thus presented by the same person at the same time:

> **Interviewer:** And what motivated you to start yoga practice?
> **Practitioner:** Yoga always attracted me. First, it attracted me as a form of gymnastics, I think most appropriate for me because I do not like to tire myself too much, I hate running, aerobics, and power training, strictly fitness when you sweat with streams, you cannot catch a breath, and the heart jumps out through the throat. It is not for me. I am not used to such an ordeal, painful bodywork or these, um, activities. And these are such exercises that first are very

nice, aesthetic, feminine; and if you know how to do them well, they are very harmonious and calm. They do not set the tempo to start with or the number of repetitions, or it is most often specified time during which given asana should be done, but there are no stiff rules that you have to keep to and that you cannot set yourself free from. The human is in asana as long as the physical capabilities allow him to be and as long as he feels comfortable on the mental and physical levels. At first, yoga interested me as a form of physical exercises, training only for the body, and then I started seeing in it a form of mental training, type of meditation, kind of a calming remedy, acquiring distance to all of what surrounds me. And, well, the physical benefits are also important because through its specific interaction yoga has a lot of health properties. (no data about the years of practice)

Positive influence on the psyche is sometimes the subject of additional explanations. The below quoted yoga practitioner ensures that she was not subjected to anybody's suggestions, nobody suggested earlier the positive influence of yoga on emotions and the psyche (she ensures that yoga specialists would agree such positive influence exists). Nevertheless, it is difficult to believe in such ensuring if earlier in the interview she talked about the books and possessing of some (according to me, *a priori*) knowledge about yoga and its influence on the body and human psyche. Previous knowledge could have an influence on the perception of what happens with her psyche and body as an alleged consequence of doing yoga.

> Apart from that, I have noticed that it has a positive influence on my mood. Because, frankly speaking,

I was quite skeptical at the very beginning. Well, I did hear before that yoga has a positive influence on emotions, so I did not want it to influence me … But, I think that in my case, no suggestion worked here and it just came to me, and I really felt at one point such a flow of good, um, positive emotions. This influence on the mental state surely would be acknowledged by some yoga specialists. (practitioner for 5 years)

For some yoga practitioners, it is only gymnastics, and they approach the information about the spiritual aspects of yoga they received earlier very skeptically.

The motives of practicing yoga change in time. In the case of more advanced "yoga practice," it often becomes a value, very important element of everyday life, and thus the motive for yoga practice is the value that states the life of an individual:

> Anyway, I am not going to give up yoga. At this moment, I do not imagine life without it, it has become something very important for me. Thanks to yoga I can disconnect from the problems, it somehow allows me to approach everything calmly. (practitioner for 3 years)

If yoga becomes the value for practitioners, then they use descriptions differentiating their practice from other forms of physical activity, sport or psycho-spiritual practice. This distinction of the action is a necessary procedure in the work on the identity of a yoga practitioner. Features distinguishing yoga from sport or fitness are constructed during the work on the emotional and cognitive part—and consciousness—of the individual. Distinguishing

(here are the identity motives) builds up motivation for further practice of yoga as it makes out of this practice a unique action, rarely met where the individual builds the concept of the *I*:

> Somebody who thinks that yoga is only sitting and some murmuring under the nose then he is very wrong, ashtanga is actually contradicting it because it is a very dynamic yoga, where something is happening all the time, where you move smoothly all the time from one asana into another, you can sweat a lot, the organism gets rid of all the toxins then … It is not just coming, exercising, like fitness just to sweat, but this is a more conscious learning of your own body, yoga starts from this, and then you enter deeper into the emotional sphere, of your own deep consciousness. (practitioner for 2,5 years)

For some, yoga is only a set of physical exercises that they do, not ascribed to any values apart from the possibility to stretch the muscles and relax. These people looked for some kind of "sport" that would meet their needs. They often use the word "training," which suggests association of yoga practice with sport. It is, for them, a form of gymnastics, sometimes treated as a substitute for correctional gymnastics. Some of them also do aerobics and aqua aerobics at the same time. Sometimes it is needed by some people to strengthen the exercises and/or body while practicing other sports, for example, swimming, skiing, basketball, climbing, et cetera.

There can be a situation that a person wanting to assist another sport with yoga in order to boost the body efficiency changes the basic performance from a given sport to yoga practice. Yoga practitioners perceiving various effects of yoga practice give up sport (e.g., rock climbing) and focus only on yoga practice. The motive "yoga as a form of gymnastics" is only an initial motive of taking up yoga, and leads to other interpretations and actions of a given person in the social world of yoga practice:

> But, with the time passing, it turned out that this is not just some exercise that makes … that we become more flexible or that our concentration improves, we can spread the strength more effectively or effectively use what the body can do. It turned out that I feel better, yes. I started getting more than I expected it would bring. And then through some parallel years I climbed, but then I climbed less and spent more time with yoga … And after 3 years, encouraged by Sławek, that I know so much that I should share this knowledge with other people. He said that I should start teaching and coming to him, then I was going to him to learn how to teach. Because this is something completely different when we practice for ourselves and something different when we teach others. And then it intensified even more … my going to Warsaw. It lasted for another year. Finally, I started teaching. (practitioner for 14 years, hatha-yoga instructor)

First Steps—The Beginning of the Practice

The stage "first steps" is connected with the actions that an individual undertakes wanting to start yoga practice or other actions that one experiences at the very beginning of contact with the world of yoga.

Many practitioners point to that before taking up yoga, they heard a lot about it and/or read. The Internet is a very important source of information and language for describing hatha-yoga practice. Some of the practitioners even say that if it was not for the Internet, their yoga practice would have never happened. What is more, stretching exercises were their favorite ones, and that is why they ended up in yoga class, or after the initial introduction to yoga, they started practicing it regularly. Some of them also mention the interest in the Eastern philosophy, for example, Buddhism—so not necessarily do they point to the interest in yoga itself. It is, in general, about the interest in the spirituality of the East and meditation. In case of many people, the need for meditation appears in the future. Some of them sometimes mention Buddhism as this knowledge that they were also interested in. So, in constructing their spiritual interests, the researched show a syncretic attitude. In Great Britain, many of those regularly practicing identify themselves with Buddhism (Hasselle-Newcombe 2005:315).

People get to yoga classes also through PE during studying, when sometimes yoga is one of the types of physical exercises to choose from. With yoga exercises we also meet at fitness class that can inspire a deeper interest in yoga.

Often, certain schools of yoga were chosen because they were suggested by friends, acquaintances, colleagues, partners, brothers, sisters, and even parents, or under the influence of advertisements. For many, attending yoga classes with friends is more motivating than individual attendance without the support from own social circle. Very vital here are the recommendations and suggestions regarding yoga practice from people coming directly from the social circle.

It is very important for the majority of practitioners to acquaint oneself with books about yoga, often these are various materials available in the Internet. The language for describing experiences of yoga is to be found there. Giving the reasons for practicing yoga, some even reconstruct, in narrative interviews, their interest in gymnastics when they were children, when they liked, for example, put their leg above the head. They ascribe their interest in yoga to these exercises and interests.

The first class can be a shock to beginners. Sometimes, it is extremely difficult to do the simplest *asanas* because the body is not stretched. Going through this class can either encourage for further practice or discourage. Pain appears:

> At the beginning, it hurts a lot, it means the body is not fully adjusted to such an effort, well, you know how it is when you stretch and you feel such pain because you cannot do more, you feel such a tension. But, this passes with time, the longer you practice, the more your body changes, becomes more flexible, more stretched. (practitioner for 7 years)

The motivation to practice yoga is already built in the initial phase of practice. It refers to the perception of the corporal effects of yoga practice and naming it. Some call it "crossing the borders" of the body, which are placed before the practitioners by their own bodies (the body resists). It is important to correctly define the pain that appears in this phase (pleasant pain).

> It was great for me at the beginning such crossing of borders of my own body. During the class, I felt such

muscles that I would not even think of, that I have them [*laughter*]. With each class I really felt how everything stretched. Although I have to admit that in the beginning, it was not easy, it really hurt and I twisted my face in all ways [*laughter*]. But, with time, the pain was gone, or maybe I got used to it. Anyway, it was after all such a pleasant pain. (no data about the years of practice)

Often practicing at home, I tried to remember the teacher's instructions from the class at yoga school, which helped me to properly define reactions and feelings of my body: "Feel how nice stretching is. Is this a pain from stretching? If yes, then it is nice, feel the pleasure from stretching … If your back hurts, that means that you are cleansing yourself, all these unnecessarily accumulated burdens are cleansed." (participant observation and autoethnography, August 16, 2012)

The concept of a pleasant pain is often used in the interviews; pain is a sign of cleansing the body and psyche. After cleansing, there is an improvement in the mood:

And I walked really hurt in general after these classes because it was a lot and intensive. But, this is a pleasant pain and cleansing … During exercises, I simply feel good, well, because I get tired and it hurts me, but this is such a really pleasant pain and tiredness, such that the person later feels so light, delicate, healthy, and alive. (practitioner for 20 years, with breaks)

The concept of "pleasant pain" appears from B.K.S. Iyengar. Feeling the pain and overcoming it has a spiritual character and shapes the spiritual pos-

ture in yoga, even if the practitioners do not know that, or even deny it[3]:

Only when there is a pain will you see the light. Pain is your guru. As we experience the pleasures happily, we must also learn not to lose our happiness when the pain comes. As we see good in pleasure, we should learn to see good in pain. Learn to find comfort even in discomfort. We must not try to run from the pain but to move through and beyond it. This is the cultivation of tenacity and perseverance, which is a spiritual attitude towards yoga. This is also spiritual attitude towards life. (Iyengar 2005a:47)

What Iyengar writes does not have to be known to the practitioners, they reach this knowledge by practice according to the suggestions expressed verbally by yoga instructors. Not many of those practicing hatha-yoga read and/or remember suggestions and language of books by Iyengar.

So you can feel already after the first class. I felt an immense flow of energy after such a first weekend meeting with Sławek. I did not want to believe what influence it has. These were really difficult classes, endurance, such that I sit, I was exhausted … and I left as if I were walking after class on tilts, floating above the ground: light, so happy, I had a will to just run. In my case, it was almost from the first class, from the first contact with yoga. (practitioner for 14 years, yoga instructor, owner of a hatha-yoga school)

The body integrated with the mind often resists, especially with the beginners. This resistance needs

[3] See also latter section of this article: *Phase of a Fuller Recognition of Spiritual Aspects of Hatha-Yoga (Para-Religion).*

to be overpowered in order to develop further. This is my impression from first classes:

Today I felt since the morning like in a cocoon. I did not want to open in the morning because of yoga. I wanted to stay focused, almost half asleep, so the outer world would not reach me. I went for a walk. This feeling persisted. It was about 17.00 when yoga exercises allowed me to open myself, stretch my body, and at the same time the perception of the world, and accept it the way it is. I could be with the outer world on equal rights without the protection of my inner world and at the same time together with it. I cracked this cocoon by stretching myself and lasting long in the positions.
Strange is this feeling of wanting to be in a cocoon. I would not know that I was in it if it were not for yoga. This tendency is something so natural, it is a natural wholeness that is difficult to notice. It is an everyday normality of the body, sometimes stronger, sometimes less strong. Physical exercises break it. They allow the body to reach normality with others being itself at the same time.
Every day I notice that stretching creates space for me, gives more space in the body and also in the mind. This is my interpretation based on what I heard once from master Szczepanik. He said then during exercises: "People move out outside the city to the countryside. What do they want? They want space. We also want more space." Master gives me more ways to understand what happens to us during exercises. Maybe without these interpretations we would not see what I am writing about now. (after five months of exercises, participant observation and autoethnography, January 30, 2008)

First classes are extremely important for undertaking further efforts in yoga practice. Going into

raptures over it, marveling at the exercises can be a very important element of building the motivation for exercising.

Some people start their adventure with yoga at home, they do it on their own using market guides available in the book, although it can be dangerous for their bodies if there is no control of the instructor, according to the practitioners.

Entering yoga practice is not an act of a one-time decision; it lasts in time and is a process. As we can see, it starts with the interest in yoga by acquiring information about it, and it may happen then that this interest is put to sleep, and during some situation, for example, promotional event (this is an intervening condition), the decision about taking up yoga is made.

One of the aims/motives for doing yoga can be the desire to obtain the awareness of the own body (focusing on the reactions of your own body). We can find similar expressions, "understanding in the body," in the books of Iyengar (2005a:30). At the same time, being aware of one's own body, we can focus on here and now and disconnect from thinking, overbearing the psyche:

I attended classes because I was interested in one aspect of yoga that I had read about somewhere, something that was at the beginning something abstract for me, which is the awareness of your own body. It is difficult to describe. With next postures we discovered our bodies more and more, we learn it, we try to listen to it. It is important to focus on the reactions of the body. For this to truly work, you

know, you need to be really focused, try to think only about what you are doing at a given moment … And it is known that this is not easy at all. All the time the head is filled with different thoughts and it is difficult to disconnect from it and focus. (practitioner for 3 years)

Learning the awareness of your own body is also connected with the reaction of the body in specific life situations. Body observation is connected with its knowing and discovering its reactions, strength and weakness, inhibitions and restrictions, pain (compare Iyengar 2005a: 49 [where he writes that pain helps to localize the affected area of the body]). Often, one can observe emotions accompanying the exercises, for example, fear:

Practicing standing upside down, I felt a bit scared. I have also noticed that very important is precision when doing the candle or standing upside down. Every gesture and a sequence of movements in performing these positions are extremely important. It needs to be done as it should, which is how the teacher says. I have also noticed a paradox that in the candle, the strength of legs is very important. Having your legs up it is good to have them strong so they would straighten up and pull the body up. It is easier then to keep in balance. (after five months of exercises, participating observation and autoethnography, January 26, 2008)

In the initial stage of the practice, there might be a change of the teacher. The practitioner is looking for a teacher that is adjusted to his character and psyche. After finding the teacher, there starts stabilization in the practice.

Motivation for yoga practice can be stopped if the beginner has higher expectations. If one wants immediate results, then one can have doubts after some time to the sense of the practice, and skepticism appears. The beginners look for effects and defined feelings, and also quick effects. They try to perceive them based on their prior expectations and possessed knowledge and observation of celebrities who do yoga (e.g., Madonna). Madonna ascribes yoga the following properties:

Yoga is a metaphor for life. You have to take it really slowly. You can't rush. You can't skip to the next position. You find yourself in very humiliating situations, but you can't judge yourself. You just have to breathe, and let go. It is a workout for your mind, your body, and your soul.[4]

Madonna treats yoga really practically—as exercises for the body, mind, and soul. Interestingly, she mentions here the soul, which shows religious connotations of yoga in the system of the values of the celebrity.

Other celebrities doing yoga are: Sting, Jennifer Aniston, Gwyneth Paltrow, Ricky Martin, Meg Ryan, Drew Barrymore, Reese Witherspoon, Nicole Scherzinger, Mathew McConaughey (Górski 2004).

If the beginner is not aware of the fact that yoga is a process and the effects come with time, then s/he can get discouraged practicing it.

I expected that yoga would allow me this … um … emotional education. Um … Yes, I think this is how

[4] See: http://magazine.foxnews.com/celebrity/hot-celebrity-bodies-shaped-yoga. Retrieved July 19, 2014.

it's called, that it would be easier for me to focus, that I would have more patience in general, that I would cope better with the stress and different tensions. Frankly speaking, I think I expected some miracles [*laughter*]. Yes … and you cannot, really. With such beliefs, you can easily discourage yourself, resign quickly because there will be no results … Maybe I've practiced yoga for too short … But definitely, without any doubt, it is so that something is improving, but anyone who does any sport can say that; after all, there are hormones secreted so the mood changes into a positive one, that is what yoga gives me, good mood, but not a special one, but a normal one. Thanks to these classes I ensured myself in the belief that yoga is … I feel my muscles, I feel generally better, and I hope that there will be bigger effects, that I will feel it somehow because I would like to spring with energy a lot and be so calm in difficult situations. That is what I would like the most; yoga calmed me down a bit, but as I have already mentioned earlier, it is more tiredness than such effects that others have. I do not know if I practice yoga, for example, for 10 years and there are no such effects as I would want that I would still do it. It is not so that I link my career with yoga because one can hear about this more recently, but I would want it to considerably change my life. I hope that I will not need 10 years [*laughter*]. (practitioner for a year, age 22)

If the practitioner does not connect with yoga practice, for example, social aims, and only sticks to visible physical and mental effects, then the lack of expected and positive effects can result in moving away from the practice. When the practitioner sees no effects, then what could keep the practice in this situation is a further attention to expectations and keeping them.

Noticing the Effects

To remain in the practice it is very important to perceive the effects of yoga—they build a strong motivation for further practice. This perception of effects is already in the first phase, and especially at the end of it. Recognition of the effects is different in different time moments of yoga practice. For the processability in recognition of the effects of yoga practice points out also an expert in this field, Sławomir Bubicz (the student of B.K.S. Iyengar):

When do the first effects of exercising appear? I ask Sławomir Bubicz, the director of Hatha-Yoga Academy. Just after a month. Better sleep, better silhouette (you keep up straight, your walk is lighter), better blood supply (hands and feet stop getting cold), bigger peace in stressful situations, calmer breath. After half a year, the relations with people start changing. You are more emotionally stable, you do not get "infected" with negative emotions from others. A feeling that everything is OK starts overcoming you. You stop feeling regret—to God, parents, anybody. (Staszewski 2009 [trans. from Polish—KTK])

One can risk a thesis that without any visible effects in hatha-yoga practitioners move away, and perceiving the effects, they stay. It is also important to see the influence of yoga on everyday life and undertaken decisions (it is about the effects outside the practice itself) and on the behavior. One day, after five months of exercising, I noticed the effects of practicing yoga; today, looking at it from the perspective of the researcher, I ascribed instrumental meaning to yoga exercises.

After doing a cycle "welcoming of the Moon," I was straightened and charged all day. I straightened myself all the time: in the train, on a walk, entering Warsaw University to participate in a PhD exam. Reading on the return trip in the train, I had a big efficiency. (after six months of exercises, participant observation and autoethnography, February 26, 2008)

When it comes to me, it is obvious that I, myself, had such difficult moments that I was not entirely sure about my decision being right. Because, you know, what you do during the class, you feel later inside, in a normal life; today, for example, I ... after doing such a standard set of exercises, I feel the difference since I started doing, and improved my mood. I noticed that I could do something else; yoga was for me like an impulse due to which we decided to do other things. I think a year ago I signed up at a swimming pool, and I go to swim about 3 times a week. Having such a connection I feel how my body is working and above all my mind. (practitioner for 3 years)

Very important is the perception of health effects after some time of doing yoga. The practitioners often talk about acquiring organism resistance and limiting getting sick. This also keeps these people practicing. Yoga instructors pay great attention to the health effects of yoga; the great propagator of hatha-yoga, B.K.S. Iyengar (2005b), himself underlined the curing properties of yoga ascribed to given *asanas'* healing properties, and in a different book, *The Tree of Yoga* (2002a:37), he mentions even that he cured himself from tuberculosis. And in the book *Light on Life* (Iyengar 2005a:267-268), he even gives a set of *asanas* creating emotional stability. In many training films, it is also underlined

at the end of describing a given *asana* its specific healing properties. The practitioners have then the language and some sort of preparation to tell others about such effects:

I don't have ... I don't have muscle pains. Suddenly it turns out that I am more physically fit when it comes to, for example, bending down, picking something up from the floor, nothing cracks, not that you bend down and ouch [*pretending to be in pain*], no. Such things I do not say that they are gone forever because ... because ... because, I don't know, but suddenly it is not only that I stopped this organism regress that started happening, that I started seeing, funny thing, but I started seeing, and some things just moved back. (beginner in yoga practice, age 50)

In case of some people, there is somewhat self-healing thanks to *asanas* practice:

Interviewer: And do you recommend others yoga training? What do you think, what kind of a person could find oneself in it?

Practitioner: Any person, any person. There are tangible assets, fitness. I had problems with the spine, so I helped myself, you can say, I set this spine, really, with yoga. I had a problem, like for three years I had this, but I managed and it is OK. (practitioner for 10 years, age 51)

Health effects are often confirmed in conversations among the practitioners and also in conversations with the instructor. If the instructor confirms the presence of healing effects of yoga, then this is a serious argument to accept such an interpretation of the way yoga works:

Next, Michał talked a lot about the positive health effects for him coming out from doing yoga. He said that he would be walking with a cane if he did not do yoga. The doctor told him that he would have problems with the knee and it would stay like that. After many months of exercises, there is no sign of the injury. He also had his fingers twisted as if he had rheumatism, yoga practice (downward facing dog) allowed him to straighten his fingers, and today there is no sign after the endurance deformations caused by the rock climbing. Similarly, he had problems with the spine. Today, he would be walking with a cane or be in a wheelchair, the doctors wanted to operate on him. Practicing yoga, after a year and a half, allowed him to get out of this problem. (after ten months of practice, participant observation and autoethnography, July 11, 2008)

The first breakthrough moment and the effect of the work on the body in yoga practice can be better physical feeling of the practitioner. One acquires the identity of the practitioner also by perceiving the physical effects:

First is, well, this that people feel physically better with their body, taking care of the body is extremely important, and we, here, in this Western culture, do not take care of the body like in the East. It needs to be remembered that the body is the temple of the soul, it needs to be cared for, nursed, cherished, this place then it harmonizes with our mind. That is why you need to take care of it, you need to love your body, which is very important; unfortunately, we, Poles, we do not love our bodies, we constantly have something to criticize it. It is here not so, we are too fat, then there is that, breasts are not so, not that tall, simply, it is

awful. Yoga teaches how to love your body and it is a great gift, we got it when we were born and it is a great gift, and we should take care of it, love it the way it is. (yoga instructor)

In the above quote, a statement appears—"the body is the temple of the soul." It is difficult to ascertain whether it is a conscious quote, or the one taken from the book by the hatha-yoga guru, B.K.S. Iyengar, *The Tree of Yoga*, "[b]ecause the body is the dwelling place of man, one should treat it as a temple of the soul" (2002a:18, see also p. 3). Disregarding the current situation, it can be stated that some language statements belong to the repertoire of the knowledge of practitioners and are some symbolic background allowing them to interpret what the sole practice and perception of the effects of practice are.

A very essential element defining the identity of the practitioner is the time of perceiving the effects of yoga practice. Apart from perceiving healing and psychic long-term effects, **the practitioner also sees the effects right after finishing exercising** (e.g., effects of mental relaxation), during last *asana* finishing every practice:

We end the exercises with a relaxation, this relaxation lasts even 15 minutes, and we lay down in a so-called corpse position, well, then there are marvelous experiences, marvelous experiences. It is great. After this effort, all of this comes back to being normal, and so wonderfully the energy flows through the body, we can even fall asleep, and sleep from all of this. Cool things happen at the end, such inner feelings, and the more the person is engaged, the better the experiences. Such a person is generally

quiet, does not get nervous, has a lower voice, is calmed. Really, there is no hogwash here. Well, the benefits here are immense, I do not get sick. (practitioner, age 49)

A very interesting effect of practicing hatha-yoga is the influence on social relations of the practitioner. **Practicing yoga opens the body which being in such a state enlarges the openness of the subject towards other people.** Work on the body becomes the work on interpersonal relations:

Interviewer: And when it comes to limitations that yoga eliminates, what does yoga give in interpersonal contacts?

Practitioner: Above all, a huge openness. The person is not even aware how the body causes the closing of the body if not such a contracting of the body as it limits us. On one side, it limits us, and on the other side, we close ourselves in our body, not wanting outside. And here, slowly, slowly, the opening of the body causes the opening towards the surrounding. Really! (practitioner for 4 years, age 46)

A very interesting social phenomenon is perception of the effects by others in a given practitioner. When the practitioner sees that others, often close people, perceive the effects (a looking-glass self), it strengthens the motivation to practice and causes feelings of contentment and confirmation of the right choice of the path. A subjective self of the practitioner is made stronger, and by the perceptions of others, the individual pays more attention to new qualities of the psyche that were never there. **This is how the identity of yoga practitioner is shaping to which new content is introduced:**

I am definitely calmer, it brings such a great balance, mostly mental, but I suspect that it links with that we still develop physically. So harmoniously our body, it also is that, such mental harmony … very … I don't even suspected that people at work also feel it, see, always ask me if this is the influence of yoga [*laughter*]. And I say, I think so [*laughter*]. So, it is a great, great advantage when others apart from me see some important changes in my behavior … Well, yes, this could be really true, yoga can give such a strength, my husband tells everyone that thanks to yoga I became a better partner in everyday life [*laughter*]. (practitioner for 7 years)

The beginner sometimes compares himself to other practitioners: Do I come up to them with my fitness? Generally, in hatha-yoga, there is a rule not to compare oneself to others, and to perform *asanas* according to one's possibilities. However, people who treat yoga as sport or gymnastics feel the need to compare themselves to others.

Phase of a Fuller Recognition of Psychophysical Effects and Ascribing Appropriate Meanings to Them

After perceiving physical effects in the first phase of the process of development of the practice, there is a fuller perception of the effects, both physical and mental. There is a fully conscious connection of the physical development with the effects of psychic peace and calmness. This skill of connecting is a symptom of the beginning of the second phase of the development of the practice of hatha-yoga. Some of the elements of this physical and mental process can occur in the first phase, but its fuller develop-

ment occurs much later. This process (linking the physical and psychic developments—the concept of integration [see: Iyengar 2005a:4-5]) never ends; what is important are harmonious linkages of the psyche and the body:

It is such an ideal connection of the body with the spirit. The longer you exercise, the better and … it gets deeper into you, the better you understand it. Although this is a very slow process, I am not an authority in this matter, but, according to me, the soul of yoga, for me, the soul of yoga is this marvelous harmony. The fact that you can do this, that you are able to get such a cooperation between these two parts of you, such different parts, such an integration. (practitioner for 4 years, age 23)

And all the time I practice like this, develop, go somewhere, gain different skills. I change, right? Because yoga is something … it is a process that causes changes, we change in the body, but we also change emotionally, mentally. As you maybe know, it is impossible to disconnect the body from the mind. When we are unhappy or mentally down, then our body is down, too, right? It is said that people somatize and due to the suffering they start being sick. There is also such a nice saying that in a healthy body, there is a healthy spirit. Working on your body we influence the state of the consciousness, the mind, we feel happy, more balanced. And this is how we reach deeper and deeper, we learn ourselves, our week sides, we strengthen ourselves. (practitioner for 14 years, yoga instructor, owner of hatha-yoga school)

Even practicing yoga as a sport will not stop the influence of the practice on the psyche.

There is no greater difference that the spiritual aspect is omitted in the beginning. Asanas are psycho-physical exercises, not gymnastics. Sooner or later, a man will experience in them inner harmony, integration, and happiness. He will empirically discover the spiritual layers of his humanity that will lead him to further changes. (Pawłowska 2012 [trans. form Polish—KTK])

Yoga practice turns out to be as an "agency" that influences the psychic changes in the individual against his/her will:

I, as a passive observer, that is, a person that has never had contact with yoga, I believed it to be a kind of sport, and now I hear that it is something different … Well, I have a friend that recently started going to yoga, and she treats it like that, you can do yoga like that. She values this emaciation that you can relax, focus on the most important things. It also helps her a lot, but she does it mechanically. And, absurdly, it turns out that even though she does not try achieving that, then yoga influences her psyche, as well. Although she might not be aware of this, does not see that, she perceives her world differently. (practitioner for 5 months, age 24)

First, yoga class, as it has been already mentioned, is not always a nice occurrence. Yoga requires a large physical effort and starting the use of those muscles that might have never been used. The beginnings of exercising can be very difficult, even after a few months of doing yoga:

After class, at 19.30, in the changing room, there were comments about the exercises in lifting up legs to the perpendicular position (exercises for abdominal muscles), that they were hard and Michał

overdoes them. But, these were accepting comments with smiles.

Really, Michał usually gives us a hard time, sometimes it is on the verge of endurance. I barely manage, try to survive to the moment when he says, "Maximum … enough." Exercises in one hour for the initial group are hard, intensive. Although the last exercises were mainly stretching, but also exhausting. (after eight months of practice, participant observation and autoethnography, May 20, 2008)

It is Saturday; today I went to yoga in Źródliska Park. These meetings were organized by the company Yoga Center, from Gdańska Street.[5] The aim is advertisement for two months in the park at 12.00 in the fresh air (they are free classes). It was ashtanga yoga, very difficult exercises.
The pace of doing the exercises was so fast that, really, you cannot think about anything else, full concentration here and now. There was even no time to observe how others exercise, but I liked the exercises. I really felt relaxed. This monotony of the intermission worked wonderfully.
After the exercises, my muscles hurt and I was sore. At the end I asked a question: How long did the instructor lady exercise? She said that the advances should be measured with our own measure, "how much further do I bend in comparison to previous times," or if I do a given exercise better. She stated that you should not look at the instructor and compare with others. (after eight months of practice, participant observation and autoethnography, May 24, 2008)

5 See: http://www.yoga.net.pl/. Retrieved November 17, 2013.

Such training causes muscle pains and cramps, sometimes you cannot do given exercises, which causes some problems with self-esteem. However, with more hatha-yoga practice, if a proper meaning is given by the practitioners (e.g., that yoga is a challenge, a healthy physical exercise, spiritual practice, etc.), then they stay with practicing it, and **they increase the intensity of the practice.**

The meaning of diagnosing your own body, getting acquainted with it is an effect that the person achieves at some point of practicing hatha-yoga. The experiencing of the body is a constant process in yoga practice, and in it there is getting acquainted with somebody's own body, for example, thanks to lasting in a given position. It is some form of a contact with oneself. Achieving this moment can sometimes last for years:

> This contact with your own body was something that cost me a few years, such searching and … such … how to say it. I really wanted to understand what it is all about in this slogan. Apart from that I understand the words, well, um. (practitioner for 8 years)

Diagnosing the body refers also to its different mental qualities. The body has, for example, memory; it means that the body can have some consciousness of itself. The subject of the action here treats the body subjectively, somehow it has an agency:

> And this is interesting that after a half a year break I only need a week and it is better than it was … to move, you are more stretched, and the body remembers. (practitioner for 10 years, age 51)

Experiencing the body is connected with **experiencing life.** The body reflects our current life situation. It is not a sign vehicle only, it is an active agent. Working in yoga on our body, we work on our life because the body expresses the life of practitioners:

> Because everyone is different, everybody has different conditioning, different life experiences, and different lanes, it goes and it processes differently. And even if it is happening not right, if we have some regress, stay in one place, then this also has some purpose, reason, and in this moment it shows us something about ourselves, and we can work with it. (practitioner for 5 years)

Diagnosing the body is also diagnosing through hatha-yoga practice the role of breathing in our life. One discovers here the connection of the breath, body, and mind. The breath links with the movements of our body, and the right breath with the mind concentration. Realization of this idea in practice is visible especially in classes with an instructor who usually pays attention to calm and correct breathing. It is important to perceive the effects of yoga practice (in this case breathing) on life outside the classes and *asanas* exercises:

> And, um, I did not mention a very important thing, I think the most important thing in yoga, that is breathing. It would seem that breathing is really simple, it seemed so to me until I went to yoga [*laughter*], um, to be honest, correct breathing is the basis of every well-done posture … Only then can the air affect every part of our body, breathing is synchronized with every move. And … and this correct breathing is also connected with this focusing, concentration

> … Such learning of the correctness of breathing is not easy, but later when we learn it, even outside of class, to breathe properly, that is, by diaphragm, then we realize that we begin to function differently, that somehow we have more energy, we are less sleepy. (practitioner for 3 years)

Breathing has many functions. Very important here is cleansing the body. The breathing is a regulator of our actions, their speed and quality. All of this can be experienced while performing *asanas*, which, of course, can be moved to our everyday life. If the breath orders the rhythm of the exercises, then, through analogy, it also orders the rhythm of our actions in life and the rhythm of life in general:

> Breathing has many functions, one of them is cleansing the body, liquidating the tension. A breath in cleanses the mind and the body, with the breath out all of these contaminations are let out. Secondly, and also important, breathing helps us to deepen the exercises, particular postures, it also sets the rhythm of the exercises. It tells what pace you exercise in, how far you can move doing asanas, I mean, of course endurance and the capabilities of the body. (practitioner for 7 years, age 22)

Sole, specific breathing exercises (*pranayama*) are often done before or after *asanas*. *Pranayama* practice is about correct breathing, controlling, and regulating appropriate rhythm of breathing, sometimes about its withholding (Iyengar 1983). The practice of *pranayama* nourishes healthy features of consciousness (*vritti*).

The meanings ascribed to yoga change while practicing it, for example, from treating it as physical

exercises to exercises calming down the psyche, or methods of fighting back the stress. It is connected with the increase of physical endurance of the practitioners, which allows them to better concentrate on the psychic or spiritual side of the practice.

Mental calmness has its opposition, and it is psychic aggravation. It happens through the aggravation of the body. Here, one also perceives the connection of the body and the psyche. That is why in yoga, according to the practitioners, it is very important to adjust the sequence of the exercises so after stimulating exercises appeared calming exercises. **All of this state the belief that between the body and the psyche there is a meaningful connection.** The state of bodily stimulation influences the state of psychic stimulation.

Intermediate practitioners ascribe yoga mainly the meaning of changes in the body, and later in the psyche, and improvement of the physical and psychic well-being:

A person discovers such new physical horizons and knows their body better because you feel such parts of the body that you have not even known that they exist, and more importantly, you change psychically. You calm down, relax even. I, for example, learned patience while practicing yoga. I used to be an awfully hot-tempered person! Somebody or something made me upset and I exploded! And now [*laughter*] … really, I sometimes do not recognize myself [*laughter*] … this yoga is a very good thing. I am just a bit when it comes to its influence on life … but [my boyfriend Paweł], oh my Lord! Simply an oasis of peace! But, he is already a maniac. For him, yoga, it could be said, is his whole life [*laughter*] … you know, every day 2-3 hours he does yoga, arguing with him is an art and a miracle! (practitioner for 2 years)

The physical and psychic well-being starts building a new quality of life. After several years of practicing yoga, some practitioners ascribe yoga the meaning of "improving the quality of life." It is a meaning that is connected with all changes, psychic and physical, and connected with improved quality of everyday life (controlling emotions, lower stress, more creativity, and even the feeling of happiness, etc.):

Well then, what yoga gives me is surely from the moment I practice I am happier, you know what I mean? Well, simply somehow what you practice in yoga transfers to my everyday life, I mean, I am no longer so tense, I do not worry about everything, it is a bit so that if I manage to achieve something in yoga, something that seems to be out of my reach, then I feel so, that it does not have to be only like this in yoga because, well, I know, like I would get some wings [*laughter*]. Because I have more faith in myself and now I look at the world more optimistically with hope for betterment, and I await some new challenges and I do not try, like in the past, to be unseen, hoping that I would not be noticed and I will somehow survive this situation … I also stress less now, constantly there is this calmness assisting, I am more relaxed and it brings me grand benefits not only because of this that it positively influences my organism and the state of my spirit, but also I somehow do better in class, I have more ideas, I am more creative, and I am not afraid to speak up. I also learned to better control my emotions, these negative ones … And, with full honesty, I can recommend yoga to others as a remedy both for the body and the soul [*laughter*]. (practitioner for 3 years, age 22)

Such a complete approach to the interpretation of changes in life thanks to yoga practice is somewhat a confirmation of making the right decision about practicing and justification for undertaking big physical and mental efforts connected with practicing yoga. Ascribing meaning of improvement of quality of life states somehow accepting yoga as a necessary practice in everyday life. It is also an indicator of the appearance of the second phase in yoga practice. The life attitude changes and the behavior in different situations changes, as well. All changes that happen in the life of an individual and its identity state the initial character of yoga.

The quality of life is connected with the psychic changes linked with **the openness** that in yoga is connected with the openness of the body, which is then transferred onto **the openness in the life itself.** Belief about such benefits and about the marvel of yoga is socially strengthened by opinions of other practitioners:

Whereas if we control our mimics, that we do not do wild faces because it hurts us or we do not grit our teeth, this is something … something new. First, second, third thing new for the body and this influences such openness towards the new in general in life … Simply, something new happened. (practitioner for 8 years)

The change of life attitude and the quality of life is also **a change of diet and the style of feeding.** Diet is a form of addressing the body; thanks to this yoga practice changes the way of treating the body through eating different, healthy food. The need to use stimulants is also smaller:

In general … I ate whatever … In general, such unhealthy food or such that somewhere … um … I don't know, like chocolate that is … increases the level of serotonin and improves the mood, and so on, cheese, and so on, such things that work so stimulating the organism … And, this is the moment when it works as if being more subtle, your sensitivity to your body, to your surroundings, and you also start, I noticed, you start feeling what you eat … and you better listen to the needs of your organism, for example, you feel better what is good and what is bad for you, um … right, so, I, for example, acquired a taste for simple food, some simple products with no chemistry, that I have a greater pleasure from eating such a things. I do not want to eat fast food and drink fizzy drinks, and that's in general. (practitioner for 5 years)

A long-term hatha-yoga instructor talks about a proper diet (see the quote below), using **specific terms.** "Toxins," "adding toxins," "organism poisoning," "awaking the consciousness," "auto-destruction through nutrition," "organism cleansing," "enlarging the space"—these are terms of a language often used by the instructors, and are delivered to the adepts of yoga so they could understand the reactions of their organisms and their inhibitions connected with the diet. The terminology connected with the diet is provided by famous gurus of hatha-yoga, for example, Sri Pattabhi Jois (2010:24) quotes Upanishads: "When the food we take in is pure, our minds become pure. When our minds become pure, memory becomes steady." Terminology and this knowledge show us

a close connection between nutrition and the state of the mind. These terms are later used by the practitioners. They refer to the complete approach to life and body. The observation of the body and its feelings connected with nutrition gives some basis for reflection. This reflection has even a "para-religious" character. The practitioners start wondering what is good and what is evil. This reflection starts from the thought about what is good for one's body:

> The quality of what we put into the body is very vital, yes, we cannot treat our body like a rubbish bin, we put anything when we are still young, the body manages well and we do not feel it, right. But, with time, the amount of toxins gathered in the body grows, and we, unfortunately, start getting sick anyway, some illnesses appear. And not only on the level of bones and muscles that we become stiffer due to some life experiences that tense us up, yes, body … it is known that stress goes over to the body, we tense up, yes, if it is long … if the stress holds on for a long time, we tense a lot, and this tension stays permanently in our body. But also, bad nutrition causes that different toxins accumulate in different muscles, cells, joints and because of this joints become stiffer, everything is so swollen, and set, and through practice of asanas we can cleanse this, yes. But, it is good when we clean not adding more toxins. Because we can cleanse practicing asanas, but all the time we will still, for example, smoke cigarettes and poison ourselves. And it will be so that we clean ourselves here a bit and here we will poison ourselves a bit. And this will all be somewhat in one place. But, after some time, we will realize that you cannot work like this because this is such a destructive action, yes. We

poison ourselves for different reasons. Everybody has their reasons why s/he uses different stimulants and works auto-destructively. But, we are aware of that, our consciousness awakes and some things, earlier not important, become vital, we take care of it, we wonder whether … what would be better to eat to feel better. (practitioner for 14 years, hatha-yoga instructor, owner of a hatha-yoga school)

Thanks to exercises more attention is paid to the nutritional problem also before the exercises. Eating heavy meals before practicing *asanas* and eating directly before exercises is not recommended:

> One of the participants of this feast left later in the evening during the exercises and did not return to the class, he felt weak because of having eaten fried camembert cheese in wild chanterelle sauce, as he stated. (participant observation, November 10, 2008)

The teacher teaches us to feel and **name the feelings of our body.** His words, language forms allow us to feel some difficult exercises and resulting from them states of the body positively:

> When pulling the body back from the wall on the line with the arms supporting against the floor, Michał approached me, and when I simply could not do that exercise, he supported my back with his knee, saying: "Straighten your legs, straight knees, hold with your legs, hands delicately support, you will feel stretching, you see how wonderful that is. Wonderful, right? Wonderful, right? Wonderful, right." I answered barely making a sound, "Wonderful." The exercise seemed to be awfully difficult. After a while I managed to do it. The main problem was

with the technique (straight legs) and breaking the fear. I kept my position later on with a much smaller effort. (participant observation and autoethnography, November 11, 2008)

I was at yoga in the park. Michał ran the class. Today yoga was set on searching for the balance. There were many exercises to train balance: tree, trikonasana, et cetera; Michał, while doing the asanas, paid attention to the feeling of the body, especially the ones connected with the balance:

– "Feel how the back parts of your legs stretch, how your calves stretch (while doing the downward facing dog)."
– "Feel the balance between the right and left foot, feel how you achieve the balance, how you balance between the right and left side of your body. Feel how the center of gravity moves between the right and the left side of the body (the mountain position)."

Michał also said a lot about achieving balance between tension and relaxation. He talked about this while doing trikonasana: "Feel how your thighs work. Let the left leg work, but let abdominal muscles stay relaxed. The work of the body is tension, but also relaxation. Relaxation is also work." When we were breathing lying with our feet together, resting, Michał paid attention to breathing: "Hear and feel the wind. Now pay attention to your breathing. It is your inner wind. It cleanses your lungs." (participant observation and autoethnography, August 16, 2009)

The improvement of quality of everyday life is also an increase in the feeling of self-value, self-esteem, self-confidence, perseverance that changes the life attitude and resolves many problems in everyday life. This all is ascribed to yoga. **The individual has the awareness of acquiring new psy-**

chic abilities thanks to yoga, which builds one's identity as a yoga practitioner:

> For example, I don't know … I walked with a proudly raised head, let's call it … then different things started solving themselves. It turned out that people looked at me differently, that they don't attack me, that I don't have to attack. (practitioner for 8 years)

> From what I have noticed, I am more self-assured in the positive meaning, I know how to sell myself, I know my value, and I have no feeling of inferiority. Simply, when I have to do something, I give all of myself and I believe in myself, believe me or not, but this brings effects, and surely this is the result of yoga because from the moment of starting the exercises, then something really started changing in my life. (practitioner for 3 years)

It is very important to obtain social skills. They are connected with attentiveness and concentration on the here and now. Heightened sensitivity into another person is the basis of being nice towards others. Interviews also show a high self-awareness of the researched and their reflexivity concerning their identity and what happened to it after starting the practice of yoga:

> I became, if I say so, more aware and sensitive towards what happens around me. In the past, I would not notice that. People are very busy now, only haste all the time, work, classes, work, classes, and again, and again. There is not even a second to look outside the window, to see how the world looks. Apart from that, I try to smile more often at people, just because, with no reason, just simply be a nice person. (practitioner for 3 years)

With the progress of the practice, many people **want to deepen this practice.** One of the methods is a trip to a solitudinal training camp, or trips to the roots of yoga—to India and schools operating there:

> Well, you know, what we deal with is only a part of what yoga really is. That is why Paweł [advanced practitioner, interlocutor's boyfriend] saves money to go to India to such workshops. (practitioner for 2 years)

However, some people, at some point, run away from the practice, and their practice can end in just the moment of perceiving the changes in their bodies and psyche:

> There are people who, noticing the changes that happen, have to stop practicing, yes, they have to stop practicing because these changes are difficult to cope with, it turns out that there is too much to change and they are not ready yet. Right … for example, if someone is really addicted to cigarettes and knows that it is not good for him, he is aware of that, sometimes people run away from this. They run away from the practice because they do not want to face what they have already noticed. They have noticed that they hurt themselves, but they are not ready to change it. Of course, if they went on practicing, then it would help them to achieve the goal, become stronger. (practitioner for 14 years, yoga instructor, owner of a hatha-yoga school)

Phase of a Fuller Recognition of Spiritual Aspects of Hatha-Yoga (Para-Religion)

Some sort of problem for the practitioners is the attitude towards the spiritual aspects of yoga. As it is known, yoga is originally linked with certain spiritual and moral values that need to be obeyed. It is the so-called Eightfold Path of Yoga by Patanjali (Iyengar 2002b). First, there should be morality and only then exercises of *asanas*. If we imagine yoga, following B.K.S. Iyengar, as a tree, then the roots would be moral values (*yamas*). Breathing exercises and meditation are also elements of the practice.

Thus, the elements of yoga are at the very beginning bans, so-called *yamas*—withholding from violence (*ahimsa*), withholding from lying (*satya*), withholding from theft and greed (*asteya*), lack of desire and control over sensual desires (*brahmacharya*), lack of greed (*aparigraha*). Next, there are also recommendations (*niyamas*). It is somewhat the trunk of the tree of yoga—cleanliness (*sauca*), contentment (*santosa*), self-discipline and eagerness (*tapas*), self-knowing (*swadhyaya*), giving oneself to God (*Iswara-Pranidhana*). Giving oneself to God points the most to the religious aspect of yoga practice—it is about focusing on the godly aspect, although many Western teachers do not accept it as a religion as not to discourage the willing from practicing yoga, being at the same time confessors of different religions.

The bans support the development of cleansing the body and mind, and recommendations are the signs that should be followed that strengthen the practice.

Yoga practice is described in the remaining elements of the Eightfold Path: the practice of yoga postures (*asanas*, branches of the tree), breathing exercises (*pranayama*, the leaves of the yoga tree), withdrawal (*pratyahara*, bark of the tree), concentration (*dharana*, the sap of the tree), meditation (*dhyana*, the flower of the yoga tree), clean awareness (*Samadhi*, the fruit of the tree of yoga, when in the climax we forget about ego, the soul penetrates every element of the body). *Samadhi* is pure awareness, connection with the object/objects of meditation, and achieving the state of unity with the universe (Iyengar 2002a; also see: Eliade 1997:106-110; Iyengar 2002b; 2005a:3-37).

The spiritual elements point to the goal of yoga, that is, seeing the soul. Performing *asanas* allows finding the unity of the body, mind, and soul. This is so-called active meditation (Iyengar 2002a:149). At the end of the development of practice, posture is done in a perfect way (Iyengar 2002a:149). **Yoga allows withholding the movements of the mind** (*chitta-vritti-nirodha*).

The practice of *asanas* does something to the body of practitioners, and it is the beginning of some phenomena appearing. **These phenomena can be explained by the language of medicine and physiology of the body;** however, the moral-religious side of yoga **can only do as much as to give some food for thoughts.** This thinking is often supported through literature about yoga, together with the linguistic terminology taken from there:

> Nerve centers stimulate breathing, you know, that when you breathe differently as I read here, that some nerve is closed, some space opened then, this simply influences the well-being, the mind. These are not any magical things, this is this, when you go to do fitness, then you leave with serotonin or some other euphoria, I do not know which euphoria. Nobody is shocked, the same is at yoga, this is also movement, the same as in any other movement. I, personally, believe that this is according to yogis, according to people that make their religion out of this, well, this is something created by God. Even if not by God, then surely by wise men, even if, well, let's say, I don't have to believe that this is created by Siva, but that it was worked on through thousands of years, or hundreds let's say, that one, second, third came up with this idea, I mean, one did, the second continued, the third, and so on, and so forth through hundreds of years, even thousands because it is still being developed … If it was done according to the commandments of yoga, then first, for example, one needs to clean the consciousness and act in a moral way. Do some things and don't do other things. And it is written what should be done, what should not be done, more or less the same as in Christianity. Just like in any other religion … Only then you approach the practice. So only this, even if I start exercising, but I come across some brochure that tells me that then it makes me think, for example. (practitioner for 8 years)

Some of them show **a selective approach** to the whole philosophy and yoga practice. Yoga, in this situation, delivers a wide array of rules and practices that are the basis of free choice of an individual, choice connected with some elements from the set of rules. This is somewhat a **private choice;** it is done independently from institutional conditions and compulsions, as it often is in traditional and institutionalized religions.[6] Modern religious topics, apart from self-expression, the ethos of mobility, sexuality, and familism, are also a subject of individual autonomy (Luckmann 2006:147-154). Free choice agreeing with the interests of an individual—in this case, regarding what yoga is—is

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[6] Compare: Knoblauch (2006:23, 25-26).

an expression of individual autonomy. It can be some philosophy and/or style of life with religious elements, but yoga can also be treated as physical exercises. Even if we point to a free choice of some elements of yoga practice and discard its religious character, then, in the end, as in the example below, we can point to spiritual elements, where the awareness of oneself gives also "such awareness of the surrounding world, connection with nature, harmony" (practitioner for 5 years). **Yoga becomes a privatized and individually understood para-religion or quasi-religion.**[7] The individual finds grounds for the individual choices in the net of direct contacts, for example, among friends, colleagues, an environment of common interests, family, et cetera. These individuals find themselves in a private sphere—primal public institutions no longer assure legitimization for these autonomic choices[8]:

[7] Para-religious phenomena are connected with the interest in the final and existential aspects in the life of a man, but there are no beliefs in supernatural powers included. Para-religious approach is present in, for example, some psychotherapies or in various corporation cultures, where work on the meaning of life and individual identity are undertaken (Greil and Robbins 1994; also see: Greil and Rudy [1984] who write about so-called "identity transformation organizations"). These organizations, whether they ascribe themselves features of religious organizations or not, show some features of religions and religious practices. Yoga practice in the Western context can be treated as a privatized para-religion, when the individual defines here what is important for him/her from the ultimate concerns that I am working on, for example, identity or understanding the sense of life and its aim.
If hatha-yoga solves existential problems and changes the identity of an individual, then it is a para-religion. All of these statements about privatizing spirituality and religion become religiousness, autonomically described by the individual (Knoblauch 2006; Luckmann 2006). However, it should be remembered that religion is a social creation, not purely psychological (Prus 2009:124-125).

[8] Compare: Luckmann (2006:145-146). Although "religion requires a religious community," we have also secular agencies that help in alternation and/or confirming the plausibility structure of social reality—as psychotherapy or institutions of political indoctrination (see: Berger and Luckmann 1991:178). There are also other institutions—as yoga, meditation, mindfulness courses, Eastern dancing, and karate schools.

Yoga can be done in disconnection from the philosophy it is connected with … It can be treated only as some sort of physical activity. It does not need to be treated as a whole, anybody can choose, take from yoga something that is the most interesting, can focus on its different elements such as breathing exercises, meditation, Buddhist or Hindi philosophy. (practitioner for 5 years)

Yoga seems to be helping in privatizing and individualizing the values of spiritual areas. People have different needs and different practices are good for them, the choice of these appropriate for individual people states the **"privatizing of yoga practice"**:

Because everybody needs different things, right. Maybe this is good for me because it agrees with me, because I have such personality and such a way with yoga, or with the attitude towards life. It is good for me, but maybe somebody else needs something else, and it is not known how this road will go, that maybe one day it will go in such a spiritual direction, or maybe it remains on such a body level and such benefits for here and now, and you do not know it cannot be disapproved of. (practitioner for 5 years)

After some time of practicing yoga, there are some **auto-definitions** connected with yoga appearing. In general, it is difficult for the practitioners to define who they are in yoga practice; for sure, they are not yogis because it requires enormous devotion and strong practice excluding from the everyday life, it first and foremost requires time for practice. Generally, they define themselves as "exercising/practicing yoga." **Yoga is, for them, something**

more than physical exercises, but also something less than simply spiritual practice:

Interviewer: So what is more important, body or spiritual development?

Practitioner: Well, rather both, I guess, because you cannot disconnect these two. Only that in case of yoga together with spiritual development there is also physical development this is the simplest way it can be described because not always when you exercise can you also develop mentally, and here, well, I am not saying that I went to yoga just to somehow get into the philosophy or to meditate or fly in general. And I am not a yogi after all, I only practice yoga. (practitioner for 20 years, with breaks)

Auto-definitions that appear in the third phase of the development of the practitioner are connected with **the acceptance of oneself as a person.** Yoga exercises are some form of taking care of oneself. Being good to oneself, after some time, is also connected with being good to others. Here, the element pointing to hatha-yoga as a para-religion is important because one work on the change of one's personality. A bigger awareness of such types of spirituality is shown by yoga teachers and persons practicing longer:

Well, OK, I work on my body, I make time for myself to practice, to look after myself. And everyone, I think, when they look after themselves more, love themselves, then they start feeling better. Everything surrounds you in life better, I do not know if I said it right, but when we love ourselves, then people who love, maybe they come closer to each

other. And they love as much because we love ourselves. And we radiate. We send radiation. There is something like this, but such specifying quieting, such a bigger happiness, such a bigger acceptance of oneself. (practitioner for 12 years, yoga teacher)

What is also important in yoga is **opening not only of the body but also the worldview opening, which again points to para-religious character of the practice, transcending the self.** It is then about the creating of some psychic attitude that enables some spiritual reflection:

Opening to this whole worldview, meditation … maybe the ability to accept the things that we normally don't accept because … it is so, yoga leads to emaciation, to cleansing, this is, I guess, the most important. So not to approach it as only body exercises, but open more to the philosophy so the mind would also benefit. (practitioner for 20 years, with breaks)

It is difficult to disconnect the spirituality of yoga from the bodylines and feeling of the body. This connection, frankly speaking, is the most important aspect of yoga. **The body awareness has a spiritual character:**

Interviewer: And does yoga give you anything spiritual?

Practitioner: Well, I mean, that if these were more regular exercises, then probably it would give because you enter a deeper contact with all of the muscles. You find out about the existence of muscles that before you would have no idea about because they are not usually activated, only during yoga. And you need to find out, get used to, and learn to breathe.

And, honestly, a deeper breathing makes that you enter a different … the mind works differently, you start thinking, focus on what is happening, and when you stretch every muscle, how every muscle hurts [*laughter*], try to close this pain, move away, so it is so, well, on the verge maybe not spiritual, but on the verge of spirituality. (no data about the years of practice, age 23)

The contact with the body is not only recognition of the body itself. The recognition of the sole physical body is a pretext to understanding the reality in the shape of specified mental states, for example, **being here and now or disconnecting from the thinking,** and not referring to oneself and not being in the past and the future tense (memories and projections). The body is thus a very important tool of work on the psyche that turns out to be a layer of spiritual practice because only marginally and partially are the connections with spiritual religiousness pointed out. The relationship of the corporal practice with the spirituality and psyche is pointed out by Iyengar (2005a:103): "Do not think, therefore, that asana pertains only to physical sheath. There is a total involvement between the three elements: sheath of the body (*annamaya kosa*), energy (*pranamaya kosa*), and mind (*manomaya kosa*)."

And here they tell me to overturn. Contact with the body is about that I am to look for … these movements in the body and the way to do so, to do it, and to feel comfortable because then it is ideal that the position is comfortable … and effortless. And that I can, more importantly, meditate in this posture, then only this. Of course, there is a slogan "meditate in the posture."

Well, this is quite a concrete suggestion. Of course, achieving it, I congratulate you. But, only that I think about what I do, that I am here and now, I think that for majority of people, this is such a dare not to think about millions of things such as why he does not want me or why … why somebody likes me or does not like me, what I eat, and if I earn, and so on, and so forth. Or that parents … why they were like this or were not … different things, everybody has … or how to wangle something so … different things. This is very difficult to think for an hour and a half only about this how to be here and now … such a typical slogan of Eastern religions. And this, this is an answer, too; also, I think some question that was or will be that, well, this is something new, characteristic of yoga being present here and now. This is this thing that apart from the clear physicality, such typical, corporal effects. (practitioner for 8 years)

Being here and now and gaining the awareness of the present is an extremely important element of teaching the religion of the East. Among other things, such teaching is important in, for example, Buddhism (see: Zotz 2007; Scherer 2009), but also in hatha-yoga. Meditation allowing to focus on the here and now is a part of hatha-yoga practice. Moreover, "[m]editation is integration—to make the disintegrated parts of man become one again" (Iyengar 2002a:144). What is more, Iyengar states that different names of meditation relate to the same state of meditation. There is one meditation:

In many religious practices, one will find meditation and different ways of working with the emotions and desires. You may hear of Zen meditation and think that it is something different from meditation

in yoga. But, meditation cannot be called Hindu meditation, Zen meditation, or transcendental meditation. Meditation is simply meditation. Remember that the Buddha was born in India and was also a student of yoga. (Iyengar 2002a:15; also see: Zotz 2007; Scherer 2009)

Thanks to this it is possible to build one's own syncretic spiritual attitude. The knowledge of the guru is distributed by books and goes to the practice.

In spiritual aspects of yoga, **some find certain values that influence their mental state. Humility**, as a value, becomes a mental feeling that is achieved by yoga, it is connected with gaining some posture which is the **openness attitude.** It has a mental character but in connection with "humility," it acquires a spiritual virtue. These values can be discovered quite early during *asana* practice; however, they mature together with the advancement in practice:

However, this opened me. I also remember this feeling, so new and really interesting, so fresh, creative, new; in general, the notion of humility … these were the first classes. One of the first … first months that I started feeling how cool it is to be humble that I need to fight, I pay so I demand, for example. That somebody cannot care or it can be different than I imagined, this is a completely and differently understood humility … completely different. Such daily humility, humility that I start discovering as if it just came, and I named it then. I'm telling you, it is humility. And, it was such a fantastic feeling of such a life-relief that I hung around it for several months that it is so wonderful. I mean, of course, this costs … it is not so that this is so wonderful that I walk

as if I were in love. Only that this costs, these are also painful feelings, this is also a fight with oneself, it is … like moving any stiff thing. (practitioner for 8 years)

The mental state achieved by practicing yoga allows perceiving reality differently; what used to be a problem for an individual, is no longer such a problem. Inner harmony gives strength to cope with everyday life and its problems. Although it is difficult to univocally state the influence of yoga upon the life attitudes (on the mind) of practitioners, **mentioning the change of life style**, together with the change of managing, indicates, however, a full change and full influence of hatha-yoga on the life of a practicing individual. Such changes have a **spiritual character**, not only mental or physical, and are connected with the identity transformation (para-religious activities). It is interesting that the spheres of mind and life are mentioned here at all, although the practice is connected mainly with the body and physical exercises:

With time, it is possible to notice its influence on many other spheres of our lives. I, for example, started paying attention to completely different things … some problems that, in the past, seemed so big and that, for sure, I would not manage with them suddenly became unimportant. Well, in general, yoga gave me what I wanted, that is, this inner peace, such inner harmony, but also strength. Strength because I thought to myself that nothing is impossible. If every time during the class I overcome my boundaries, boundaries of my body, then in my life, I can also cross these boundaries. So I think that yoga can be such a life style, style of thinking, acting … It is

hard to talk about something that is connected to the mind, it is hard to name some states, it needs to be lived, I guess [*laughter*]. (practitioner for 3 years)

Thanks to yoga practice we gain … we attract the inner light that solves the problems. We are often completely unaware how to do that and we are shocked that it happens so fast. And now, it's à propos of what we have to give up when doing yoga. With time, when I follow the path, I discover that some factors that cause my … this that I develop slower. And, in a natural way, if someone wants to have improvements in yoga, tries to eliminate these factors that limit him. That is why many people practicing yoga give up stimulants such as tobacco, alcohol, not to mention drugs, as well as certain styles of life that do not agree with us. We start changing it so our improvement, our perfecting, and satisfaction that followed were deeper. Some people give up, for example, life … how to say it … they stop going to discos or doing some forms of entertainment that are not good for them.

Interviewer: And in your case, what were the factors that you found as limiting you?

Practitioner: From the very beginning when I started practicing yoga, I stopped drinking alcohol. Completely. And if earlier drinking alcohol gave me pleasure, then now it is something really unpleasant. The awareness in yoga grows. I am more aware, my mind becomes clearer, is able to look at everything from a better perspective. However, alcoholic intoxication has a completely opposite effect. (practitioner for 14 years)

The spiritual aspect is also underlined in **commonsense theorizing about the essence of yoga, where Eastern philosophy of thinking is mentioned,** for example, the notion of illusion (*maya*) and liquid reality. One also moves here outside the commonsense thinking into the sphere of mystical experiences ("this is more a sort of feeling"):

And such a big Eastern weapon for such thinking is that there is this battle with these images that this notion of such an illusion, this maya that surrounds us and that … that people have this awareness, I mean, these people, I am saying, um, let us assume that people have this awareness of illusiveness of everything, that these are only concepts, that these are only images, and that the notion and the image always exist in a constant way and the reality is liquid, that it always exists in this process, and that words and images serve only as a way of transmission or as a, um, something that directs you, right. As such a … this hand that points to something, and that you do not look at this moment at the hand that is pointing, but at what it is pointing. (practitioner for 5 years)

Yoga teachers talk more about the spiritual aspects of yoga. Physical aspects, for example, breathing and movement, breath and body co-ordination have spiritual values for them. There is energy in breathing (*prana*) that, according to the interlocutor, can be identified with God. **A thesis can be done that the more advanced the practitioner, the more attention is paid to the spirituality:**

And when we breathe, we breathe in fresh prana, fresh energy, let's call it. And this energy is needed by us, we need this energy to cleanse everything. And this energy, it can be said in Hinduism, or yoga, in thinking that God is in this prana. God is … I don't know how to say it in Polish so I will say it in English. In an atom, you have the electron, and you have the proton that goes around. In the electron you have the negative and positives, and everything that holds that little atom together—God is in there. God is also everywhere. He is even bigger than the universe. So you've got God everywhere and God is considered to be this energy, this energy that is prana. So breathing is very important because the whole time you need more energy. You need more energy to keep what you're doing, to keep the positions. So in some level, I started from the level of spirit, where you're breathing in God, you're breathing in the energy. You're breathing in life force. And you need life force to keep living. (practitioner for 12 years, yoga teacher)

Teachers sometimes also talk about a conscious **search of the state of enlightenment and *Samadhi*** (state of pure awareness and/or blissfulness, complete connection with the object of meditation). This state is their aim and the aim of yoga practice.

Para-religious character is especially obvious for people who from the very beginning searched in yoga for spiritual and "religious" threads. Yoga was, for them, a certain point of achieving after searching for this right spiritual path and satisfaction in life. Yoga is, for them, searching contact with the soul, divine element. Interesting here is the fact that this contact for many years is treated as a form of perfecting oneself, which states the "invisibility of religion" also for the subject feeling some transcendentality of their corporality during the practice. The individual often chooses on its own the way to achieve this contact with "own soul." Spirituality is here a question of autonomy of the individual, its private choices shaping the "patchwork" definition of religion. Every individual has its private, individual path reaching the contact with its true I:

In the beginning, I looked for this satisfaction in philosophy, in religion, in many religions later. And later, I came across books about yoga and courses that were the answer to what I was looking for. Because yoga is … yoga itself is about finding, one can say, the perfect part of each of us. In everyone, there is something really deep, pure, perfect. And in many cultures, different religions, it is called differently. And that is why some people call it soul, some call it infinity in the heart, some call it God … and there are people who experience the contact with this, I will call it from now on, let's say, soul … contact with the soul they experience in a very religious way. Other people experience this contact not describing this as a contact with God, but as a form of perfecting, for example … the aim of yoga is always the same, that is, contact with the soul, contact with our true inner I—something deep and perfect—but there are many methods of achieving it. You can choose one method that you follow, however, if we move from one to another, well, sometimes they might seem to be contradictory, going to different directions. Admittedly, they go towards the same goal but different ways. (practitioner for 14 years)

A thesis can be made that the more advanced and experienced in the practice more often use other elements of yoga than only the practice of performing *asanas*. They sing, for example, mantras and meditate, set their own definition and the routine of practice:

My method is the heart yoga. It is yoga based on meditation every day in peace and on singing mantras. This is the base of the path of yoga I follow. And … it is about that every day, in the morning, I meditate, at least a few … several minutes, and this gives me great strength, this gives me a lot of positive qualities that stay with me the whole year. These are such qualities like peace, happiness, enthusiasm, calmness, harmony that come to me in the meditations. (practitioner for 14 years)

We come across an opposite sequence in a different statement. Below, the presented interlocutor accents first the spiritual character of yoga, then she distances herself from the religious aspects of this practice. She points to the spiritual elements when describing the breathing.

Breath is, for her, an indicator of meditational character of physical exercises of yoga. **Focusing on breathing creates the state of "not thinking."** Breath, for the advanced practitioners, have a spiritual character:

Interviewer: And what then with breathing? You said that it is the most important.
Practitioner: Well, yes, because with … with meditation then the breathing helps so one could turn off the thoughts. The moment one starts focusing on breathing, and as if following its course, then he focuses on this breathing in such a way that he stops, that this breath becomes his thought, and then you as if do not pay attention to this breath and … frankly, there is nothing [*laughter*]. And this is it that there is nothing [*laughter*]. (fitness and yoga instructor)

Next, the respondent **distances** herself from the religious aspects of yoga practice (ritual aspects such as singing the hymns) and from the instructors who introduce spirituality of yoga, and gives a simply pragmatic reason of practicing it (help in sicknesses, possibility of mental quieting, ability to direct the energy to specific places, harmonious development of the body). Distancing from the religious aspects of yoga points also to recognizing the spiritual aspects of yoga. **It seems that there is some need in people already advanced in the practice of *asanas*, but not fully identifying with the spiritual or religious aspects of yoga, to describe (explain oneself) own position in this situation:**

Because I, for example, practice yoga, I do not consider myself to be a typical yogi that sings hymns and practices yoga to, to learn meditation or, I don't know, change my awareness, no, that isn't so, this is so … well, I can't even say why I practice. There are many reasons. That it is for me some form of relaxation, that I believe that yoga can help in many ailments, in many illnesses, just thanks to such emaciation and ability to direct energy to a given place. So I say so that it is difficult … call it such a clean yoga. It cannot even be called this. Because even being in a course and having to do with such people somehow this does not fully convince me. Because a yogi sings hymns in honor of Patanjali and I am not going to sing hymns in honor of Patanjali, although I am grateful to Patanjali that he created it. (fitness and yoga instructor)

I do not play in these spiritual experiences and such things, and it pushed me away from one center. I am

practicing and believing Catholic, so other philosophies are not needed by me for anything. I have no intention to change neither my denomination nor my faith that I was brought up in. But, really, I like accepting yoga and such teachers I accept that … well, there are such dominating tendencies in yoga schools in Poland that focus on the harmonious development of the body. (no data about the years of practice)

Treating yoga as a religion is inseparably connected with corporality, with the connection of what is sensual with the body. If it happens, then there is also a change in the life of the individual, mental changes are noticeable, there is energy flow, bigger mind concentration, thus yoga can be defined by the interlocutor as a "religion" (in my sense—a para-religion) since these changes are too big to happen in a short period of time without the integration of a transcendental factor.

Other elements of the attitude of distancing oneself from the spiritual aspects is comparing yoga with one's own culture and keeping connection with that culture. Yoga is used here selectively, as physical exercises, to gain mental peace:

Generally, yoga is some philosophy, but I, well … not this moment yet, for me, or maybe yoga gives me now so much goodness, gives me peace, balance. For now, I guess … I try to find some comparison with our culture because I was brought up here, in a completely different culture, with completely different standards, Catholicism and such, my parents, I mean, my father is very religious. Well, it is difficult to switch just like that, well, maybe not, it is

difficult just like that to give up something and jump into something new. I know that some are fascinated by this and do so, but I still try to connect it somehow, find some, I don't know, equivalents? Dang it … [*laughter*] well cope with this somehow so you wouldn't have to jump over, jump into such deep water … philosophy. (practitioner for 7 years)

However, later on, the practitioner mentions that **it is difficult to run away from these spiritual elements;** practicing, you come across them all the time:

One is sure, for sure, on a certain stage, you cannot run away from the philosophy. Well, at yoga class itself, it is difficult to run away from it because it is known that the teachers mention such things when you go to camps, I have gone there for many years, there is also such an introduction to the meditation, some things … and, well, yoga philosophy needs to be mentioned, as well. (practitioner for 7 years)

Conclusions

Basing on the analysis of data, I have tried to construct the following thesis. The categories dividing the process of becoming a yoga practitioner (stages) are researcher's constructs, although they are based on the analysis of empirical data. The *in-vivo* codes, if they appear, are only inspiration for the analyst to create the categories and their properties, as well as theses.

I state, after the analysis of data, that **the work on the body is done to change the way of functioning of the mind.** This skill of working on the

body is obtained through *asana* practice. It defines the identity of the practitioners. Verbal auto-definitions can be different here, together with the distancing from the spiritual/religious aspects of yoga. Thus, becoming a yogi could be a long-term process, ending in achieving the *Samadhi* state. It is a state available only for a scarce number of practitioners. However, for the most advanced practitioners, it is a very important symbol of yoga.

The level of advancement in yoga practice (the ability in performing *asanas* and the knowledge about yoga and ascribing it spiritual aspects) describes how the individual defines one's identity, as well as the sole hatha-yoga practice. The level of advancement allows distinguishing three groups of practitioners that are appointed by gaining certain levels of growth. Some practitioners stop at the first stage (introductory stage) of becoming the practitioner. They are then yoga practitioners that build their motivation to practice yoga based on the **practical motives** connected with the corporality, that is, perception of the body, health, and calming the mind. Very vital here is the perception of the effects of the practice (see: Diagram 1 [Appendix 1]).

If they appear, the practitioners can move on to the next, second stage of the process of becoming a hatha-yoga practitioner. Then appears the ability of a fuller perception of psychophysical effects of the practice, that is, connecting the breath, feeling the body, and the mind. The ability for correct performing of *asanas* becomes greater. A new quality of everyday life is then perceived, connected with emotion control, smaller stress, bigger creativity, and even feeling happiness. The feeling of one's

self-esteem increases. Some practitioners stop at this point. However, after achieving previous values, the individual starts reflecting on the spiritual dimension of yoga, then s/he moves to the third stage of the development of the identity. Yoga then appears to the individual not only as an opening of the body but also as a "philosophical openness." Work on the body becomes a spiritual practice. Some of them feel a higher sense of humility and openness towards the world. These people already know the hatha-yoga terminology and its philosophy. These are usually instructors and yoga teachers; the most advanced in the work on the body (practicing *asanas*), which is the third group of practitioners.

However, becoming the "practitioner of hatha-yoga/*asana*" is a never-ending process as the work on the body and learning how to do the *asanas* continues on, one can never say that s/he has reached the end of these skills. Similarly, it is connected with the perception of the effects of the practice (physical, health, and mental) and discovering the spiritual dimension of yoga. Here, there are always new elements together with the need to distance oneself from other religious and/or spiritual aspects of yoga. This is what can point out to us that the identity of the practitioner (although always in the process) is the ability to perform *asanas* and perceiving the effects of practicing, as well as becoming aware of the spiritual aspects of yoga (with their acceptance or rejection). These three elements end somehow the process of becoming a practitioner, although they just barely start the process of becoming a yogi, which probably will never be started in the case of the majority of the practitioners, researched by me.

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Appendix

Diagram 1. The Process of Becoming a Hatha-Yoga Practitioner.
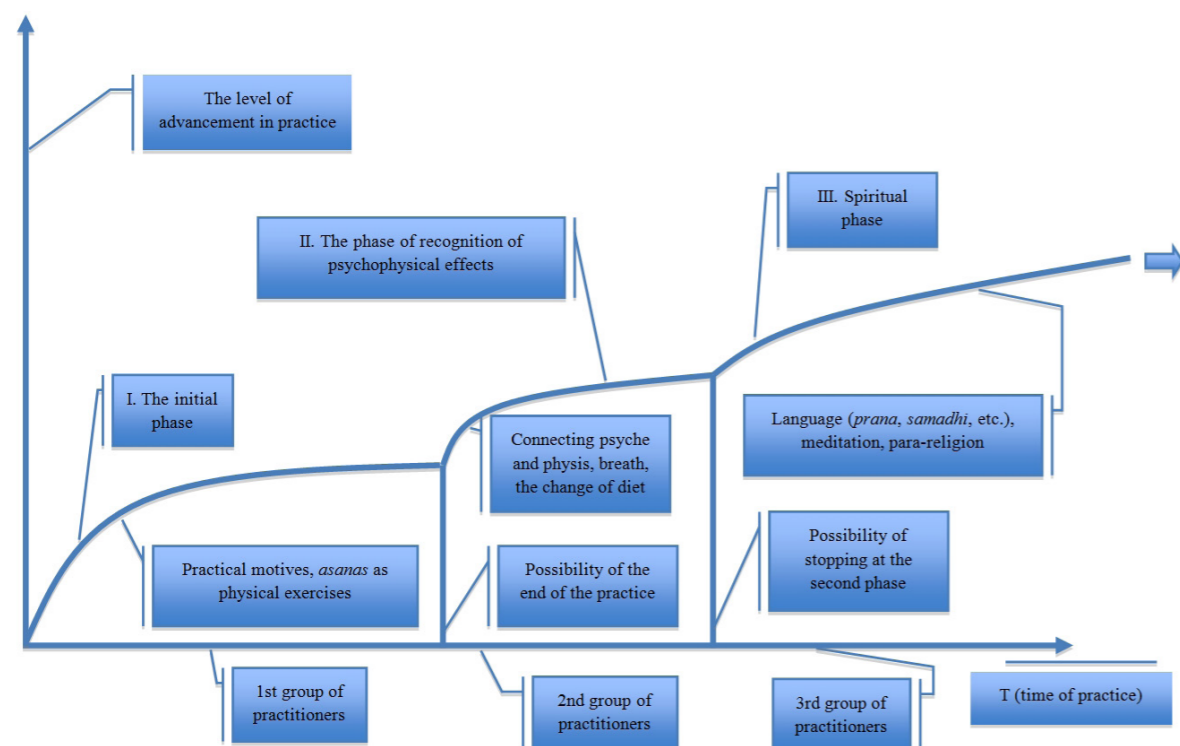
Source: Self-elaboration.

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"How Low Can Humans Plunge!": Facilitating Moral Opposition in The Church of Jesus Christ of Latter-Day Saints

Abstract   In this article, we examine how religious leaders teach their followers to protect themselves and others from pornography. Based on archival materials from The Church of Jesus Christ of Latter-Day Saints (LDS, LDS Church, or Mormons), we analyze how LDS leaders, responding to the expansion of pornographic influence over the past 40 years, facilitated moral opposition to pornography by teaching their followers to (1) set moral examples for others, (2) save their women, and (3) protect their children. In so doing, however, LDS leaders, regardless of their intentions, reproduced cultural and religious discourses that facilitate the subordination of women and sexual minorities. Likewise, these discourses suggest strong negative outcomes associated with pornography. In conclusion, we draw out implications for understanding the facilitation of moral opposition across religious traditions, and the consequences these actions may have for the reproduction or reduction of social inequality.

Keywords   Mormonism; Religion; Morality; Pornography; Social Inequalities

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Although often at odds with one another, pornography and religion represent two of the most influential social forces in contemporary American society. In the case of pornography, researchers have shown that America has become the largest source of pornography production in the world in the past 40 years, and in recent years, profits from the pornography industry have outpaced both Hollywood offerings and Fortune 500 corporations (see, e.g., Ezzell 2009; Sarracino and Scott 2009; Attwood 2011). Similarly, researchers have found that religious institutions have dramatically influenced a wide variety of policy debates (see, e.g., Rose 2005; Robinson and Spivey 2007; Fetner 2008) and legislative efforts in the past 35 years, and that

roughly 79% of Americans identify as religious (see: Funk and Smith 2012). Considering that religion has historically provided the primary mechanism of societal sexual regulation (see, e.g., Durkheim 1897; Weber 1922; Tiryakian 1981), we know surprisingly little about the lessons religious leaders teach their followers about pornography. How do religious leaders prepare their followers for our "pornified" (Sarracino and Scott 2009) culture?

We examine this question through qualitative content analysis of archival materials from The Church of Jesus Christ of Latter-Day Saints (LDS, LDS Church, or Mormons). Specifically, we analyze how LDS leaders taught their followers to oppose pornography, and in so doing, constructed the "interpretive framework" (Sherkat and Ellison 1997) necessary for religious-based opposition to pornography. In so doing, our analysis extends research on the relationship between pornography and religion by demonstrating some ways religious leaders facilitate moral opposition to perceived social problems. Importantly, it is not our intention to generalize these findings to the larger LDS or religious population. Rather, we use the examples culled from this case study to illuminate teachings religious leaders may use whenever they seek to teach their followers to respond to a specific social problem (also see: Schwalbe et al. 2000).

Additionally, our examination of Mormon teaching about pornography reveals the social construction of specific claims social elites make to influence the behaviors and activities of their followers (see, e.g., Gubrium and Holstein 2000; Bogard 2001; Sumerau and Cragun 2014). Specifically, we demonstrate

how LDS leaders' facilitation of moral opposition to pornography emerged as the result of claims-making activities wherein they defined pornography as automatically problematic, while claiming its presence caused other social and religious ills (also see: Schwalbe et al. 2000). In so doing, our analysis reveals three ways religious leaders may define social objects as inherently immoral, and encourage their followers to emphatically oppose engagement with these objects (also see: Schwalbe et al. 2000; Sumerau and Cragun 2014).

Religion and Pornography

Religious and pornographic interests have a long-standing relationship in American history (see: Sarracino and Scott [2009] for a review of this record). During the colonial period, for example, Quaker women explored their sexualities by sharing journals and secret codes regarding desire, while Puritan communities, in contrast to the prevalent sexual activity suggested by their birth and marital records, defined sex as dangerous, immoral, and sinful, except within the context of marriage and in the service of procreation. Similarly, the Civil War witnessed—and some argue facilitated—a dramatic expansion of pornography, which was quickly met by moral crusades—most famously concerning the efforts of Anthony Comstock—seeking to outlaw both pornographic composition and distribution. Further, the 1970's evidenced the birth of another expansion of pornography, which quickly became a lightning rod for religious political opposition that continues today. Rather than a simple relationship between two autonomous cultural influences, the interrelation of religion and pornography represents

a long-standing cultural conflict that has dramatically impacted legislative and sexual dynamics at all levels of American social structure.

To better understand this relationship, scholars of religion have examined the ways religious people think about pornography. Examining the cognitive structure of conservative Protestant opposition to pornography, for example, Sherkat and Ellison (1997) found that commitment to scriptural inerrancy, despite the lack of scriptural references to pornography specifically, belief in moral absolutes, and believing that immoral individual actions could contaminate large-scale social relations bolstered opposition to pornography. Seeking to further identify the impact such beliefs might have upon religious people, Patterson and Price (2012) found that negative reactions to pornography were worse for people who were more active in religious traditions (also see: Grubbs et al. 2014; Ley, Prause, and Finn 2014). Evaluation studies have found that religious identification and participation significantly influence the way people interpret pornography (see, e.g., Lottes, Weinberg, and Weller 1993; Stack, Wasserman, and Kern 2004; Manning 2006). Whereas these studies importantly reveal the outcomes of religious teaching concerning pornography, we know far less about the teachings themselves.

To understand the teachings themselves, however, we must examine the ways social elites—religious or otherwise—socially construct pornography. Rather than containing some inherent meaning, researchers have long noted that social elites socially construct specific meanings for varied social phenomena by utilizing their authority to claim specific ob-

jects should be seen in certain ways by their followers (see, e.g., Gubrium and Holstein 2000; Schwalbe et al. 2000; Bogard 2001). If, for example, survey and evaluative studies consistently show that religious people react negatively to pornography, then one may expect that religious leaders are socially constructing pornography as a negative influence in some way that resonates with their followers (see: Sumerau and Cragun [2014] for a similar finding in relation to homosexuality). As a result, understanding the social construction of pornography for religious people necessarily requires unpacking the claims religious leaders make about pornographic material in order to reveal the socially constructed meanings that lie at the heart of the survey and evaluative results. Rather than exploring how religious people respond to pornography, however, such an endeavor requires asking in what ways religious leaders teach their followers to respond to pornography, as well as other social issues and problems.

Our analysis extends this line of inquiry by examining how religious leaders, operating during institutional meetings and through church-produced literature, facilitate moral opposition to pornography. Specifically, we examine how LDS leaders, responding to the expansion of pornography over the past 40 years, facilitated moral opposition by teaching their followers how to combat pornographic influence. Importantly, our analysis reveals that even though LDS leaders never mentioned pornography before the 1970's, their elaboration of this social problem has remained rather constant throughout the past 40 years. In so doing, we explore some ways religious teachings establish and encourage the "cognitive structures" (Sherkat and Ellison 1997) followers

draw upon in their oppositional endeavors. Before presenting our analysis, we contextualize the efforts of LDS leaders by outlining Mormon sexual beliefs, while paying special attention to the ways these interpretations align with other religions.

Mormon Sexuality

Similar to other religious traditions (Sherkat and Ellison 1997), Mormon opposition to pornography arises out of the theological foundation of the religion. Mormon doctrine conceptualizes human existence as a series of stages wherein people first exist as disembodied spirits prior to birth, then become reflections of God's will during their time on Earth, and finally ascend to different levels of glory or punishment—ranging from entrance into the Celestial Kingdom for the most faithful to banishment to Outer Darkness for the most egregious sinners. Within this framework, Mormon doctrine asserts that sexual relations within marriage are necessary for bringing disembodied spirits into this world, following divinely-inspired guidelines for living a moral life, and determining one's level of punishment or reward in the afterlife. As a result, Mormons believe that their earthly experience—and thus their ability to abstain from earthly temptations—represents a God-given test of their spiritual worth (see: Ludlow 1992).

Building on this foundation, Mormon doctrine emphasizes chastity outside of marriage and monogamy within it. In educational resources directed towards Mormon youth, for example, LDS leaders stress the importance of abstaining from sexual activity before marriage, and define chastity and

sexual modesty as inherent components of moral selfhood. Echoing many other religious traditions (see, e.g., Peterson and Donnenwerth 1997; Uecker, Regnerus, and Vaaler 2007; Scheitle and Hahn 2011), Mormon doctrine asserts that followers should seek to remain sexually pure in mind and body, and that promiscuity, masturbation, and sexual fantasies are ultimately manifestations of immoral influence. Similar to contemporary religious—especially Christian—advocacy for abstinence (only sexual education programs) (Rose 2005), LDS doctrine removes sexual desire and practice from the moral path of unmarried believers.

Mormon doctrine also stresses the importance of heterosexuality. Echoing Religious Right (Fetner 2008), Ex-Gay Ministry (Robinson and Spivey 2007), and conservative Christian (Bartkowski 2001) teachings, Mormon leaders believe that God created women and men as complementary parts, destined to fulfill inherently heterosexual roles. Similarly, Mormon leaders, like many conservative Christian traditions (see, e.g., Wolkomir 2006), define homosexuality as sinful, deviant, and an abomination in the eyes of God (see: Phillips 2005). LDS doctrine relies upon limitations regarding appropriate versus inappropriate sexual partnerships. As such, cultural manifestations of alternative sexualities—such as pornography—are deemed to be social problems carrying eternal significance and alarm for "true" Mormons.

Mormon doctrine also defines procreation as commanded by God for all fertile couples. Although Mormon doctrine does not explicitly define sexual behaviors as solely for the purposes of procreation,

LDS leaders consistently refer to sexual relations within the context of familial formation and proper childrearing. Similar to contemporary religious arguments concerning "proper" family values (see: Fetner 2008), LDS leaders construct sexual desire and behavior in relation to God's commands to be fruitful and multiply. Further, Mormon doctrine emphasizes family-centered sexuality by adopting and promoting strong anti-abortion policies in both their churches and the larger social sphere. Like approaches taken by the National Right to Life movement in the United States (Rohlinger 2006) and some Muslim women's advocacy groups in Indonesia (Rinaldo 2008), they promote a family-centered conceptualization of sexual morality (also see: Cragun and Phillips 2012).

Although Mormon doctrine rests upon a theological foundation that separates it from other religious traditions, they have, as noted above, approached sexual morality in much the same way as many other contemporary religions. Considering pornographic tendencies towards sexual expansion rather than restraint, LDS leaders, like members of many religions (see, e.g., Sherkat and Ellison 1997; Rinaldo 2008), interpreted pornography as an attack upon their divinely inspired way of life and their established notions of sexual morality. As a result, they regularly discussed pornography in official speeches and publications over the last few decades, while maintaining an almost identical definition of pornography as a dangerous social problem throughout this time. In so doing, they suggested ways pornography could be overcome. In what follows, we examine how LDS leaders facilitated moral opposition to pornography by teaching followers strategies for combating pornographic influence, which ultimately relied upon these initial claims about ideal Mormon sexual morality.

Methods and Analysis

In order to better understand how LDS leaders facilitated moral opposition to pornography, we collected archives of the LDS Church's General Conference talks (1897-2012) and its monthly publication—*Ensign* (1971-2012). The LDS General Conference is a bi-annual meeting, where members and others gather to receive instructions and inspiration from Church leaders. *Ensign* is the official adult publication of the LDS Church, which generally contains faith-promoting and proselytizing guidance for members. Since LDS leaders hold editorial power over the release of all official Church documents, the combination of these materials represents a comprehensive record of official LDS teachings about pornography.

In order to specify materials concerning pornography, we utilized a word search program called *dtSearch*, which allowed us to index text files and rapidly search for specific terms. Doing so allowed us to identify all usages of relevant terms, such as "pornography," "porn," and "sexually explicit material" in order to pull the documents wherein LDS leaders discussed these issues. After identifying relevant documents, we sorted out articles and speeches concerning pornography, and set these aside for analysis. This process yielded a final sample of 427 *Ensign* articles and General Conference talks.

Our analysis was developed in an inductive manner. We examined the content for recurring patterns, and noted that LDS leaders discussed specific ways followers could oppose the spread of pornography and protect themselves and others from its influence. Following this observation, we sorted these discussions into categories, and observed that each of these strategies rested upon the claim that pornography was inherently sinful. As a result, we created categories to capture the ways LDS leaders instructed followers to protect against pornography. After examining previous pornographic and religious studies, we came to see these strategies as part of the process whereby they facilitated moral opposition to pornography by instructing followers to (1) set moral examples; (2) save the women; and (3) protect the children.

The Pornography Problem

LDS leaders sought to facilitate moral opposition to pornography because of the effects they believed pornographic consumption would produce. Drawing upon their long-established notions of non-marital sexuality as indecent and immoral, they often used abstract scriptural references to construct pornography as an abomination unto the Lord. Generally, they followed these definitions with examples of the damage pornography could create in members' families and marriages. A typical example comes from an article delivered by Richard G. Scott:

> One of the most damning influences on Earth, one that has caused uncountable grief, suffering, heartache, and destroyed marriages is the onslaught of pornography in all of its vicious, corroding, destructive forms. Whether it be through the printed page, movies, television, obscene lyrics, the telephone, or on a flickering personal computer screen, pornography is overpoweringly addictive and severely damaging. This potent tool of Lucifer degrades the mind, heart, and the soul of any who use it. ("The Sanctity of Womanhood," *Ensign*, 2000)[1]

For Richard G. Scott and other LDS leaders, pornography represented a satanic trap waiting to drain the moral fiber from God's people. As the current president of the Church, Thomas S. Monson, explained: "When I consider the demons who are twins—even **immodesty** and **immorality**—I should make them triplets and include **pornography.** They all three go together" ("Peace, Be Still," *Ensign*, 2002). Within their own institutional meetings and publications, LDS leaders claimed pornographic influence was a serious moral and social problem.

Meanwhile, they were also deeply concerned about the expansion of pornography over the past 40 years. Recognizing this trend, they began, as early as the 1970's, advocating social opposition on the part of their followers. The following excerpt from a Conference talk given in 1976—almost 30 years prior to the previous example—offers a typical illustration:

> Pornography abounds, and its ill effects are evident on every side. You know what they are. I will simply say that neither adult nor youth can see or listen to or communicate in pornography without becoming contaminated and endangering the moral fiber of the community. The sex pervert, the rapist, and the thief have become what they are because of what has been fed into their minds, which in turn has prompted

the deeds they perform. (N. Eldon Tanner, "Ready to Work Long Hours," *Ensign*, 1976)

Rather than simply an example of immoral behavior, LDS leaders claimed pornography was a powerful adversary capable of, as some Christians have noted (Sherkat and Ellison 1997), polluting the moral fiber of society. As Bruce C. Hafen explained 6 years later:

We are almost suffocated by a dense fog of sensuality. Pornography and moral permissiveness are so widespread that there is nothing to compare with it in the last several centuries in any civilized society; not since Rome, not since Sodom and Gomorrah. ("The Gospel and Romantic Love," *Ensign*, 1982)

Interpreting pornography as a stain upon moral existence, LDS leaders feared the depths of sexual corruption that could be reached if it were left unchecked. As a result, they faced a significant religious dilemma, which they ultimately resolved by using their institutional and moral authority to facilitate moral opposition.

Facilitating Moral Opposition

What follows is an analysis of the ways LDS leaders facilitated moral opposition to pornography by teaching their followers three strategies to use against its spread. First, we examine how they taught followers to set a moral example for others concerning sexual practice. Then, we show how they taught followers to save the women in the Church. In so doing, they argued that pornography sought to corrupt women, and thus women needed to be protected from themselves and temptation. Finally, we

demonstrate how they taught followers to protect the children by closely monitoring their children's behaviors and educating them about proper sexual morals. While we treat these strategies as analytically distinct, LDS leaders often drew upon more than one at a time in the same speeches and publications.

Setting an Example

LDS leaders were intimately familiar with cultural concerns about pornography. As Marvin J. Ashton explained in 1977:

How does the adversary wage this battle? … Those who are fighting pornography and obscenity have helped us recognize some of his battle plans. They tell us that a person who becomes involved in obscenity soon acquires distorted views of personal conduct. He becomes unable to relate to others in a normal, healthy way. Like most other habits, an addictive effect begins to take hold of him. A diet of violence or pornography dulls the senses, and future exposures need to be rougher and more extreme. Soon the person is desensitized and is unable to react in a sensitive, caring, responsible manner, especially to those in his own home and family. Good people can become infested with this material and it can have terrifying, destructive consequences ("Rated A," *Ensign*)

Seeking to combat the possible effect of pornography, LDS leaders facilitated moral opposition to pornography by teaching followers to set a moral example for others.

LDS leaders taught followers to set a moral example in their local wards and stakes by modeling godly

values. Explaining the importance of moral leadership at the local level, Gordon B. Hinckley clarified:

[E]ven though the Internet is saturated with sleazy material, you do not have to watch it. You can retreat to the shelter of the gospel and its teaching of cleanliness and virtue and purity of life … Now I know, my brethren, that most of you are not afflicted with this evil. I ask your pardon for taking your time in dwelling on it. But if you are a stake president or a bishop, a district or branch president, you may very well have to assist those who are affected. May the Lord grant you wisdom, guidance, inspiration, and love for those who so need it. ("A Tragic Evil Among Us," *Ensign*, 2004)

Emphasizing the difficulties people might face, they taught local leaders to provide a positive example and a source of "guidance" and "inspiration" for other members. Echoing long-standing religious notions about the importance of moral role models (see: Weber 1922), LDS leaders asserted that followers could forestall the influence of pornography by setting proper examples for the people they interacted with in their local churches.

LDS leaders also taught followers to oppose pornography by using their own lives to symbolize morality. Generally, these lessons focused on things individual Mormons could do to demonstrate godly sexual values to others. As Gordon B. Hinckley explained:

Your goodness must be as an ensign to your people. Your morals must be impeccable. The wiles of the adversary may be held before you because he knows that if he can destroy you, he can injure an entire ward.

You must be wise with inspired wisdom in all of your relationships lest someone read into your observed actions some taint of moral sin. You cannot succumb to the temptation to read pornographic literature, to see pornographic films, even in the secrecy of your own chamber to view pornographic videotapes. ("To the Bishops of the Church," *Ensign*, 1988)

In the face of pornography, LDS leaders emphasized the importance of living moral lives in order to safeguard themselves and those around them from "the wiles of the adversary." Similarly, Robert E. Wells discussed the importance of explaining to others that:

We therefore feel that Christians will control their thoughts and not indulge in anything pornographic or immoral or indecent. We are totally against premarital sex, petting, and improper dating practices. We feel that both parties should come to the marriage altar in unqualified purity, and that virtue, chastity, and faithfulness lead to solid marriages which will last through eternity. ("We Are Christians Because …," *Ensign*, 1984)

Similar to the emphasis on family values promoted by religious social movement groups (Rohlinger 2006; Fetner 2008), LDS leaders suggested that Christians could signify sexual restraint and control in ways that others could emulate.

LDS leaders also drew attention to things other religious groups were doing well, and suggested that Mormons should become involved in these endeavors or replicate these actions on their own. The following excerpt from an article outlining lessons

one LDS leader learned from a trip to some Muslim countries offers a typical example of this tactic:

> Leaders of these Arab countries will not accept any activity that threatens Islam or the faith of the believers. For example, drug and alcohol abuse, pornography, and immodesty are strictly controlled because they are offensive to Muslim beliefs. While laws forbidding these things may seem restrictive to some foreigners, we enjoy the freedoms they provide. We adults do not have to contend with ugly influences, and we can feel confident that our children are not encountering them in their schools. (Joseph B. Platt, "Our Oasis of Faith," *Ensign*, 1988)

Rather than decrying the repressive elements of Sharia law, the speaker praised the moral "freedom" created by the strict control exercised over sexualities in many Muslim lands. Similar to some Muslim women who align with Sharia law in order to craft oppositional stances to pornography and abortion (see: Rinaldo 2008), LDS leaders interpreted sexual repression as a necessary step in the prevention of evil. At other times, they stressed the importance of aligning with other Christian groups fighting similar battles. As N. Eldon Tanner explained:

> We love virtue and chastity and decry the immorality and moral decay which is so prevalent in the world today. We align ourselves with all God-fearing people who are striving to save the world from the sins of pornography, abortion, homosexuality, and other deviant sexual behavior. ("A Practical Religion," *Ensign*, 1979)

Foreshadowing—although only by a couple of years—rhetoric deployed by leaders of the Reli-

gious Right to garner support for Christian-based political activism (Fetner 2008), LDS leaders suggested Mormons could set an example of religious cooperation in the battle against any and all sexual immorality.

Overall, LDS leaders facilitated moral opposition to pornography by teaching their followers to provide moral examples for the world. In so doing, however, they reproduced stereotypical depictions of pornographic influence and effects, and affirmed religious messages that depict non-heterosexual and non-marital sexualities in a negative light. Similar to leaders of the Religious Right (Rohlinger 2006), some Muslim women in Indonesia (Rinaldo 2008), and many conservative Protestants (Sherkat and Ellison 1997), their efforts ultimately reproduced cultural notions concerning the inherent immorality of pornographic materials.

Saving the Women

LDS leaders also expressed concerns that pornography ultimately degraded and devalued women. Rather than paying attention to both sides of these ongoing debates, however, LDS elites drew upon arguments that pornography was inherently destructive without ever mentioning complementary arguments suggesting that pornography provided women with a path to liberation (see: Ezzell [2009] and Weitzer [2009] for discussions of these ongoing debates). During a talk about women and violence, for example, Richard P. Lindsay noted:

> As pornography has become more popular, its content has changed. Much of it now portrays violence, deg-

radation, and humiliation. Common themes include sadism, incest, child molestation, rape, and even murder. This underscores the belief that pornography is both addictive and progressive, leading the viewer to more explicit and deviant material in an attempt to achieve the same soul-destroying "high." The effect pornography has on the viewer is insidious. ("I Have a Question," *Ensign*, 1984)

Seeking to facilitate moral opposition to pornography, LDS leaders thus emphasized the importance of saving women from this evil contaminant.

LDS leaders defined women as passive victims unable to resist earthly temptations. As Gordon B. Hinckley explained:

> The young women of this generation not only have tremendous opportunities, but they also face terrible temptations. The pornography merchants cast their filthy lures in the direction of girls, as well as boys. The exploitation of sex has become a marketable commodity employing every vile trick of the advertiser. ("Our Responsibility to Our Young Women," *Ensign*, 1988)

As the title suggests, LDS leaders stated *their* women were in need of protection from pornography, and that women could fall victim to "terrible temptations." While LDS leaders were concerned about the temptations women might face, they also defined women as sources of temptation for men. Specifically, their statements suggested that women were in danger of being *both* tempted by pornographic materials and the objects of others' pornographic desires. In this way, LDS leaders cast women into traditional patriarchal roles of both the helpless vic-

tim in need of protection *and* the dangerous sexual temptation that could rattle the sensibilities of men (Johnson 2005). The following discussion (almost 20 years after the previous one) of dangers young women face provides a typical illustration of this two-fold depiction of Mormon women:

> [Y]oung women, please understand that if you dress immodestly, you are magnifying this problem by becoming pornography to some of the men who see you. Please heed these warnings. Let us all improve our personal behavior and redouble our efforts to protect our loved ones and our environment from the onslaught of pornography that threatens our spirituality, our marriages, and our children. (Dallin H. Oaks, "Pornography," *Ensign*, 2005)

Utilizing common rape myths and victim blaming tactics (Ezzell 2000), LDS leaders warned women not to make themselves "pornographic." Rather than encouraging women to express their own sexual agency, these statements constructed Mormon women as potential victims in need of religious protection (also see: Daly 1985). In so doing, they, like anti-reproductive rights activists in recent decades (see: Rohlinger 2006), reproduced the subordination of women by encouraging moral opposition based upon devalued versions of womanhood.

Considering that LDS leaders regularly outlined ways women could become pornographic objects and suffer from sexual temptation, it is curious that there is no similar concern about the victimization of men. If LDS leaders believed that pornography itself was so powerful that women had to be protected from it on multiple levels, then one has to wonder

why they did not appear to believe men needed the same protections. On the other hand, this gendered double standard (Johnson 2005) suggests that pornography might not actually be the real issue here. Patriarchal notions of manhood, for example, rely heavily upon the assumption that males control themselves and exert control over others. By contrast, patriarchal systems define women as social beings in need of male control and protection. One could thus read LDS leaders' emphasis on protecting women (and not men) as an attempt to use the example of pornography to reinforce the subordination of women to men within the Church (see: Johnson 2005).

LDS leaders also facilitated moral opposition to pornography by emphasizing to men the importance of protecting women from worldly temptations. Specifically, this tactic involved stressing the importance of sexual purity for women specifically. Similar to the above observations, the focus on "purity" for women (and not men) reproduces patriarchal systems that locate women's value in their ability to gain and keep a man by offering a sexual "object" that is purely his alone (Johnson 2005). The following excerpt from an article authored by Joseph B. Wirthlin provides an illustrative case:

> Rise above the squalor of pornography, obscenity, and filth. Be virtuous and chaste. Uphold your young sisters in the gospel by respecting their budding womanhood and protecting their virtue. Always conduct yourselves according to the commandments of God when you are with them. You want your girlfriends to remain clean and pure. Just as you surely would protect the chastity of your own sister in your fami-

ly, likewise protect the virtue of your sisters in God's family. ("Live in Obedience," *Ensign*, 1994)

Echoing conventional religious teachings concerning sexual purity and women's virtue (Daly 1985), LDS leaders encouraged men to protect their women. Further, such statements suggest that women's unsanctioned sexual activity may render them less valuable to the men of the Church, and in so doing, potentially limit men's ability to claim status via the acquisition of "pure" or "godly" wives (also see: Daly 1985). Similarly, N. Eldon Tanner explained the divinely inspired roles of women 20 years earlier:

> We hear so much about emancipation, independence, sexual liberation, birth control, abortion, and other insidious propaganda belittling the role of motherhood, all of which is Satan's way of destroying woman, *the home, and the family—the basic unit of society*. Some effective tools include the use of radio, television, and magazines where pornography abounds and where women are being debased and disgracefully used as sex symbols. ("No Greater Honor: The Woman's Role," *Ensign*, 1974)

Echoing conservative Christian depictions of inherent marital and familial gender roles (Bartkowski 2001), LDS leaders suggested pornography was yet another tool Satan would use to destroy moral "women" that submissively accepted their God-given subordination, and lead these women into the immoral realms represented by "liberation" and "independence." Considering the emphasis placed on patriarchal standards of women's sexuality in the previous illustrations, LDS leaders used pornography as an example (or interpreted women's use of

and/or participation in it) to bolster women's subordination to men within the Church.

LDS leaders facilitated moral opposition to pornography by stressing the detrimental influence these sexually explicit materials could have on women (but not men). Similar to some conservative Protestant (Bartkowski 2001), historically sanctioned Catholic (Daly 1985), Religious Right (Fetner 2008), Ex-Gay Ministry (Robinson and Spivey 2007), and some Islamic (Rinaldo 2008) religious traditions, they accomplished this by removing women's agency, and defining women as potential victims in need of paternal protection from both temptation *and* abuse at the hands of pornography producers. However, they never offered complementary talks concerning the importance of protecting men from pornography, and when they did discuss concerns about men, they never suggested that manhood was the problem or that women should protect their men. Rather, in such cases, they suggested that women (not men) should cover themselves and be protected for the benefit of men. Whereas these teachings allowed them to facilitate moral opposition to pornography, they relied upon depictions of women as inherently subordinate and weak, which ultimately facilitate the ongoing subordination of women (see: Schwalbe et al. 2000) and persistence of patriarchal systems of social control (Johnson 2005).

Protecting the Children

Considering the familial emphasis evidenced throughout Mormon doctrine, it is not surprising that LDS leaders were acutely aware of the possible

negative effects pornography could have on children. As N. Eldon Tanner explained:

> [D]ealers in pornography are accumulating great wealth at the expense of the people and to the detriment of their health. With all the evidence of child pornography, it is deplorable that any parent would allow any child to be so exploited. ("The Debate Is Over," *Ensign*, 1979)

Seeking to mobilize moral opposition and to maintain the Church's emphasis on parenthood, LDS leaders taught followers to protect their children from pornography.

LDS elites facilitated moral opposition to pornography by stressing the importance of taking an active role in the lives of kids. In an article explaining the importance of being mindful of the media options children are exposed to, for example, R. Gary Shapiro explained:

> Based on this new movie's review as "arguably the best," we might have given our son permission to see it. However, we noticed in a longer review these warnings: "Unfortunately, the sex angle is dealt with here … in a way that is less than tasteful, and one scene in particular may be enough to steer young ones in another direction, despite the PG rating." This review went on to mention the use of a certain word, "which supposedly nets an automatic PG-13 rating—though this movie is rated PG." It concludes with the warning that "parents should be advised that this isn't particularly a film for young children." Translated into biblical standards, this was an obscene movie. ("Leave the Obscene Unseen," *Ensign*, 1989)

LDS leaders explained that parents could protect their children from immoral influences by examining media offerings in order to ascertain what was and was not suitable. Spencer W. Kimball explained:

There is a link between pornography and the low, sexual drives and perversions. We live in a culture which venerates the orgasm, streaking, trading wives, and similar crazes. How low can humans plunge! We pray with our Lord that we may be kept from being in the world. It is sad that decent people are thrown into a filthy area of mental and spiritual pollution. We call upon all of our people to do all in their power to offset this ugly revolution. It is ridiculous to imply that pornography has no effect. There is a definite relationship to crime. Murder, robbery, rape, prostitution, and commercialized vice are fed on this immorality. Sex statistics seem to reflect a relationship between crime and pornography. It is utterly without redeeming social value. We urge our families to protect their children in every way possible. ("God Will Not Be Mocked," *Ensign*, 1974)

Kimball links pornography—in the abstract rather than giving a specific example—to "perversion" and "crime," and in so doing, also vilified healthy sexual activities, such as orgasms and homosexual relationships. Considering that some research has shown emotional and sexual benefits arising from responsible porn consumption (see: Weitzer 2009; Attwood 2011), LDS leaders' teachings relied upon simplifying or ignoring scientific knowledge concerning pornography use and outcomes.

LDS leaders also facilitated moral opposition to pornography by encouraging parents to teach their chil-

dren about sex. Similar to the aforementioned strategy, however, this tactic often relied upon advice concerning the importance of parents in children's lives, drawn from oversimplifications of pornography and sexuality. As Terrance D. Olson explained when discussing the importance of teaching children:

First of all, do not underestimate the power of children to choose the right when they have been properly taught. Although they may be confronted with drugs or pornography as early as elementary school, if they understand the truth about our purpose on Earth, the sacredness of our bodies, and the reality of right and wrong, they need not be traumatized by exposure to such incidents. ("Teaching Morality to Your Children," *Ensign*, 1981)

Echoing the emphasis on parental attention developed by Olson while adding derogatory language exhibited in other statements, Don L. Searle, Jr. explained:

The law can do little at present to deny erotica to the willing seeker, even if he be a juvenile. Filth seems able to find its way even into junior high and grade school youngsters' hands, aided many times by uncaring or, worse yet, conspiring adults. Can parents really expect, considering these influences, to protect their children from the effects of pornography? They can if they help the children develop an internal moral censor to steer them away from smutty material, even in the face of peer pressure. ("The Obscenity Flood: Can It Be Stopped?," *Ensign*, 1971)

In illustrations like this, LDS elites emphasize parental involvement, but couple this involvement

with depictions of sexual phenomena as inherently dirty and sinful. As Richard P. Lindsey explained in response to parental questions about pornographic influence:

I also suggest that we teach our children at an early age and in a positive way about our Father's greatest earthly creation—the human body—and about the sacred gift of procreation. Then, probably sometime after baptism, we should discuss with our children our feelings about pornography. By then, most children are aware it exists. Hopefully, we can short-circuit pornography's potentially destructive impact by dealing with it in a straightforward, sensitive way—in a gospel perspective—before the images overwhelm our children's minds. ("I Have a Question," *Ensign*, 1984)

Echoing America's failed attempts to reduce sexually transmitted diseases, teen pregnancies, and other unhealthy sexual issues through abstinence-only sexual education programs (see: Rose 2005), LDS leaders emphasized talking to children about sex in ways that ultimately reproduce children's fear and anxiety (also see: Elliott 2012). In so doing, their efforts to protect the children may have inadvertently left their children more vulnerable to negative aspects of sexual experience (Elliott 2012). In either case, their efforts allowed them to facilitate moral opposition by encouraging parents to take an active role in protecting their children from pornography.

In sum, LDS leaders facilitated moral opposition to pornography by encouraging parents to protect their children. In so doing, however, they reproduced simplified—and often misleading—conceptions of sexuality, which can put children at greater

risk for sexual trauma and negative outcomes (see: Rose 2005; Jewkes and Wykes 2012). Further, they accomplished this by amplifying parental fears about the safety of their children, and reproducing cultural notions that define parental efforts—rather than the complexity of social and biological realities children are exposed to—as the ultimate determining factor in children's development (see: Fields 2001). As a result, LDS leaders' facilitation of moral opposition to pornography may have inadvertently exacerbated the problematic influences they initially sought to resist.

Conclusion

LDS leaders have been deeply concerned with possible negative effects of pornography and the rapid expansion of pornographic material in recent years. At the same time, pornographic celebrations of loosening sexual restraints and non-procreative sexual pleasure threatened institutionalized interpretations of LDS sexual morality. Seeking to resolve these dilemmas, LDS leaders, beginning in the 1970's and continuing into the present, made pornography a central element of their religious teaching, and devoted substantial time to constructing pornography as inherently immoral. In so doing, they facilitated moral opposition to pornography by teaching their followers to set a moral example for others, save the women among them from sexual excess, and protect their children.

While their facilitation of moral opposition allowed them to successfully mobilize followers against pornography, it also reproduced cultural notions concerning sex, gender, and families that facilitate

negative sexual experiences and the subordination of women and sexual minorities. By characterizing women as potential victims in need of paternal protection and all non-marital sexual relations as ultimately immoral, for example, they reproduced conventional religious and sexual teachings used to justify the marginalization of women, sexual minorities, and sexual diversity in many religious and secular contexts (see, e.g., Robinson and Spivey 2007; Fetner 2008; Sumerau 2012). Similarly, their simplification of sexual realities and emphasis on only the possible negative aspects of pornography without consideration for possible benefits of pornographic and sexual exploration reproduced patterns of sexual education and regulation that have led the United States to lead all industrialized nations in teen and other unplanned pregnancies, sexually transmitted diseases, sexual violence, and sexually-related crime (see, e.g., Rose 2005; Jewkes and Wykes 2012). Whereas sexualities and religion researchers have sought to understand why religious groups develop wholly oppositional stances to pornography (Sherkat and Ellison 1997), as well as sexual education programs that could drastically improve sexual satisfaction, safety, and health (Rose 2005), these findings suggest that part of this answer may lie in the ways religious leaders construct and teach their followers about sexual issues.

These findings also support research on the impact of religion on controversial sexual issues (see, e.g., Peterson and Donnenwerth 1997; Rinaldo 2008; Sharp 2009), public policy debates concerning sexualities (see, e.g., Rohlinger 2006; Robinson and Spivey 2007; Scheitle and Hahn 2011), and societal regulations of sexual behavior (see, e.g., Durkheim

1897; Weber 1922; Tiryakian 1981), and extend this research by revealing how religious leaders, regardless of their intentions, draw on their institutional and theological authority to facilitate moral opposition. LDS leaders employed their prominent positions to define pornographic consumption as a dangerous social problem, and provide a set of acceptable strategies followers could adopt to solve this dilemma. Similar to leaders of other conservative Christian groups, such as the Religious Right (Fetner 2008), Ex-Gay Ministries (Robinson and Spivey 2007), and the National Right to Life movement (Rohlinger 2006), they promoted a faith-based definition of moral sexuality, which ultimately elevated the status of some sexual groups and practices at the expense of others. Whereas researchers have generally focused on the outcomes of religious teachings concerning sexuality (see: Sherkat and Ellison 1997), the case of LDS leaders suggests, as Weber (1922) noted, there may be much to learn from the role religious leaders play in creating dominant "cognitive structures" (Sherkat and Ellison 1997) concerning social problems.

While our analysis of LDS leaders' statements concerning pornography may appear unique, as a sensitizing concept (Blumer 1969), "facilitating moral opposition" may shed light on past, present, and future religious reactions to controversial issues. In fact, existing literature provides an implicit glimpse of ways this process may occur across many religious traditions. Research exploring conservative Protestant depictions of homosexuality, for example, reveals that followers of many different traditions have been taught similar lessons about gay and lesbian experience (Wolkomir 2006). Similarly,

research into Religious Right notions of "family values" demonstrates that a small group of religious leaders may mobilize people from a wide variety of different organizational and denominational strands of Christianity by appealing to shared notions of familial morality (Fetner 2008). Echoing these trends, researchers examining Ex-Gay groups found that leaders often relied upon stereotypical depictions of feminism and traditional psychological models to justify movement activity against lesbian, gay, and women's rights groups (Robinson and Spivey 2007). Further, research into contemporary debates within the United Methodist Church found that, depending on which side of the conflict they were on, leaders drew upon either traditional or progressive interpretations of Christian morality to gain support for their positions (see: Moon [2004] for similar dynamics among organizational leaders in other Protestant traditions, also see: Cadge et al. 2012). Although only systematic empirical research on these and other religious controversies can uncover the precise processes whereby religious leaders define the nature of and responses to sexual issues, we believe that facilitating moral opposition is likely a generic social process (Schwalbe et al. 2000) of moral regulation. While future research may reveal important variations in how the process works, we believe that facilitating moral opposition may be examined across diverse religious traditions.

To fully understand the "cognitive structures" (Sherkat and Ellison 1997) believers draw upon to make sense of social issues, we must not limit our analysis to outcomes. Rather, we must also examine the ways religious leaders construct and disseminate the shared "ways of thinking" (Sherkat and Ellison 1997) and authoritative claims (Schwalbe et al. 2000) believers rely upon throughout their secular and religious experiences. This will require expanding and integrating our conceptual and methodological toolkits to make sense of both what religious leaders do in the name of morality *and* the outcomes of these actions. While religious leaders—like those at the heart of our analysis—may facilitate moral opposition to any number of social issues, they may also engage in similar processes to provide moral support for other social issues. Unraveling and comparing the variations in religious leaders' teachings, claims, and social constructions of social issues—sexual or otherwise—may provide important insight into the mechanisms of social change.

Acknowledgements

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Ethnographies of Maintenance of a New Self

Abstract   This article suggests expanding the discussion regarding the association between educational boarding schools, social class, and one's sense of self, by examining the issue of how subjects who experienced reconstruction of the self continue to maintain this reconstruction as the years go by. This issue is hereby discussed by way of the case study of the Boarding School for Gifted Disadvantaged in Israel. The subjects of study are defined as "ethnic" (Oriental) and, through the boarding school experience, State authorities carried out their intentional assimilation into mainstream culture. Study findings show that, over the years, boarding school graduates steadfastly participate in the school's annual Remembrance Day ceremony, in memory of the Fallen Soldiers of Israel (and specifically, the boarding school). Remembrance Day ethnographies and social gatherings held at the homes of boarding school graduates a few days before Remembrance Day show how participation in the Remembrance Day ceremony *charges* the graduates' sense of self—instilling in them the same structure that characterized their lives when they were students in the boarding school. Moreover, the structure of Remembrance Day itself (signifying the *presence of absence*) provides a (symbolic and narrative) charge, maintaining the boarding school graduates' sense of self and their national identifications.

Keywords   Self; Self-Maintenance; Nationalism; Ethnicity; Re-Education; Boarding Schools

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Educational boarding schools are closely linked with the concept of "social class." Prestigious boarding schools play a prominent role in the maintenance of *privilege*, preparing subjects from a high socio-economic class to serve as elite members of society (Gaztambide-Fernández 2009a; Khan 2011). Educational boarding schools (also called "residential schools"), on the other hand, are populated by members of the low socio-economic classes, also called "poor" or "disadvantaged" populations (Shoshana 2012a). These boarding schools operate mostly as assimilation institutions, whose objective is to bring about the re-education of its individuals (Wallace 1995). Many studies proffer rich ethnographies that describe how educational boarding schools use social and personal processes and practices involved in the social construction of the concept of self (see, e.g., Gaztambide-Fernández 2009b). One of the important research issues, which is not discussed sufficiently in the literature, and which may help to expand our comprehension about the connection between boarding schools and the self concept, deals with how individuals who experienced reconstruction of the self in their past (by way of a boarding school education or participation in a unique educational program; see: Zweigenhaft and Domhoff [1982] in this context) continue to *maintain* this same self-image, years after the (re)construction or the discursive institutional crafting of the self has occurred.

This article attempts to examine the ways in which individuals who have experienced an *intentional* intervention in their self during adolescence, via education in a state boarding school (the Boarding School for Gifted Disadvantaged in Israel), act with regard to this intervention. The Boarding School for Gifted Disadvantaged, operating since 1961 to this day, is an educational institution run by Israeli State authorities for students defined as "ethnic" (Oriental, or *Mizrahim* in Hebrew), living in peripheral areas ("development towns"). The school's objective is to help this population *assimilate* into Israeli culture (Shoshana 2012a).

The study findings show, for example, that over the years boarding school graduates willingly participate in the annual Remembrance Day ceremony, in memory of the Fallen Soldiers of Israel. This ceremony takes place at the boarding school once a year, as it does in every other educational institution in Israel (Goodman and Mizrachi 2008). Moreover, many graduates meet, year after year, a few days before Remembrance Day for a social gathering in one of the graduates' home. The study findings also show how Remembrance Day in itself becomes a happy social gathering, somehow taking on a structure similar to that of a wedding or celebration. A content and form analysis of Remembrance Day as a public event (Handelman 1998) reveals a unique integration of "Life" and "Death," as well as elements such as national mourning, sacrifice, and personal recollections of the student boarding school experience. These characteristics play a significant role in the self-maintenance of individuals who have experienced intentional reconstruction of the self. As will be discussed further, participation in Remembrance Day *recharges* the graduate's self with the same structure of detachment from one identity, and the attainment of another identity (rebirth), as acquired in the boarding school. Sahlins (1995) indicated a similar charge structure in his book on the King of Hawaii and Captain Cook. Every year, the king of the tribe comes to the ocean. From the bottom of the ocean, God appears and bestows the king with the authority to rule as his representative on Earth. Just as the King of Hawaii is charged by God or by Captain Cook, the graduates are similarly charged by their "creators," upon returning to the "house of creation" (the boarding school), and through the form of the boarding school's headmaster, who conducts the ceremony.

It is worth noting that the structure of the Remembrance Day ceremony itself provides a (symbolic and narrative) charge. The configuration of the ceremony in Israel (and its association with Independence Day) provides a narrative meaning ("from Ruin to Redemption"), which maintains nationalism and a sense of one's personal self (Handelman 1998). Moreover, the Remembrance Day ceremony also signifies the *presence of absence* (Handelman 2004), and a sacrifice of the private self for the good of the nation as a whole. The presence of absence and the sacrifice are both central themes in the self-concept of the Oriental graduates who—following the conversion of their ethnic identity, which occurred when they were students—experience a dialectic between their "first nature" (biological or attributed Orientality) and what a number of graduates refer to as their "second nature" (the "Western" or "modern" self and cultural capital acquired at the boarding school).

Before describing the findings of the study in detail, I wish to discuss the relationships between boarding schools, social class, and the concept of self.

Boarding Schools, Social Class, and Self

Current ethnographies about elite boarding schools describe the processes of producing class and privilege (Gaztambide-Fernández 2009a; Khan 2011). Even if today's boarding schools offer accounts in the spirit of meritocratic idealism (Karabel 2005), they still operate as institutions that pass on cultural capital to the members of the elite class (or what Khan [2011] calls "democratic inequality").

In his study of an elite boarding school, Khan (2011:14) describes how the students learn to place their privilege experience within a framework (among other ways, by experiencing their self as exceptional and by achieving the understanding that hierarchies are natural), and how they develop privilege—"a sense of self and a mode of interaction that provides them with advantage." One of the insightful practices of privilege that Khan (2011) describes is affiliated with ease—feeling comfortable in just about any social situation. *Privilege* means being at ease. According to Khan (2011), the result of these processes is finding one's place. This expression echoes Bourdieu's (1977) description of learning the "rules of the game," as a critical resource for reproducing privilege (and social inequality) (for the construction of privilege in affluent schooling also see: Howard 2008). The constitution of an elite class identity is also described by Gaztambide-Fernández (2009a:6) by way of "*the five E's of elite schooling*: exclusion, engagement, excellent, entitlement, and envisioning."

> While the explicit purpose of the admissions process is to choose who will be allowed inside, the implicit purpose is to *exclude* and to provide a rationale for such exclusions. Once admitted and enrolled, students *engage* a plethora of learning opportunities in a wide range of academic, athletic, and artistic disciplines that rival those available at many small liberal arts colleges. As students develop their talents and demonstrate their excellence, they confirm their *entitlement* to the privilege of a Weston education. At the end of their Weston careers, students *envision* themselves in other equally elite spaces, pursuing challenging careers and assuming leadership roles. (Gaztambide-Fernández 2009a:6)

Boarding schools are connected with class, even by way of the processes linked with *social mobility*. Cookson and Persell (1991) describe, for instance, how African American students report a process of isolation from their families as a result of their boarding school education, and the absence of full integration into the White upper class. As a result, the students feel like "outsiders within" and experience "acting upper class" and the "burden of acting White" in both cases. Cookson and Persell (1991:20) claim: "Part of the burden may stem from the students' realization that they can only 'act' the part." Even Gaztambide-Fernández (2009a) describes the unique experience of students from ethnic and racial groups in prestigious boarding schools and identifies them. These students, for instance, feel the pressure to assimilate, ambivalent belonging ("being in but not of this elite boarding school world" [Gaztambide-Fernández 2009a:164]), and are not sure why they were accepted to the school. One of the results of this experience is what Gaztambide-Fernández (2009a) calls "unequal distinction."

It is worth nothing that what is common to the main target population of the elite boarding schools—upper class students—both in the United States and in England (Weinberg 1967), is that the boarding school education does not seek to create social alienation between the family culture and the boarding school culture. Boarding school students are expected to acquire a character (or "cultural capital" in Bourdieu's terms) that suits the culture of their family. This issue is extremely important since it did not appear in boarding schools that were offered for subaltern populations in the United States (Wallace 1995) and in Israel (Shoshana 2012b).

The boarding schools that were established in the first years of the creation of the State of Israel (1948) were offered mainly to Jewish immigrants and descendents of immigrants from Islamic countries, called "Orientals" (and considered "ethnic" subjects). These boarding schools were created with the aim of re-education, in an attempt to phase-out "Eastern" culture and encourage the adopting of the "Western" cultural capital, which is described as more suitable to modern conditions. Like in other places in the world, the popular research in Israel discusses the everyday organizational work involved in the creation of a new self in boarding schools or in practices linked to the reconstruction of the self. This means that we do not know enough about how individuals who experienced reconstruction of the self (via boarding school education) *maintain* their selfhood years after this construction. This article seeks to fill this research gap. Before doing so, I would like to describe the research design and the institutional establishment of the new self in the Boarding School for Gifted Disadvantaged in Israel.

Research Design and Methods

The study of the Boarding School for Gifted Disadvantaged in Israel is based on three kinds of data used to understand the social origins of the boarding school, its purposes, educational practices, and the work involved in the construction of the new self. Content analysis (Strauss and Corbin 1998) was performed on governmental protocols and organizational reports relating to the establishment of the boarding school. The documents analyzed were protocols of the Education and Culture Committee discussing the educational boarding school (late

1950s and early 1960s); documents kept in state archives concerning the educational boarding school; organizational steering reports written by the enterprise initiators and those who were responsible for its operation in the Ministry of Education; and brochures produced by the boarding school headmasters, since its establishment to this day (for a description of the complex content analysis, see: Shoshana 2012b).

In order to understand the effects of a boarding school education, and of the processes involved in reconstruction of the self, I conducted interviews with 60 boarding school graduates from different classes—15 graduates from each decade (1960-2000). Throughout the years, approximately the same number of students studied in the boarding school in each class. Altogether, 40 men and 20 women were interviewed. These numbers corresponded to the percentage of boys and girls who studied in the boarding school over the years. I conducted the interviews in coffee shops, in the university offices, or in the homes of the interviewees. Each interview took between two and four hours. Most graduates have an academic degree (60% have a BA, 15% have an MA). Most of them live in big cities (approximately 90%) rather than in the development towns in which they grew up as children and where their families still live. Approximately 60% of graduates reported an above-average income and a professional occupation requiring an academic degree(s) (for a specific description of the sampling methods, interview structure, and key findings, see: Shoshana 2012b).

Following the reports of many graduates (80%) about their consistent participation in the boarding

school's annual Remembrance Day ceremony, I decided to conduct observations on these occasions.[1] Altogether, observations were conducted on three Remembrance Days (2002-2004).[2] The Remembrance Day ceremonies began in the afternoon. Each time, I arrived approximately three hours before the ceremony began in order to observe the preparations for the ceremony and the reception of graduates by boarding school representatives. In addition, I learned from the interviews that a few groups of graduates (from different classes) meet about a week before Remembrance Day for a social gathering held in the evening at the home of one of the graduates. Altogether, I participated in four such social gatherings between 2003 and 2006.

This paper is based on the findings from Remembrance Day ceremony observations conducted in

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[1] It can be hypothesized that participation in the Memorial Day ceremony is not connected to the self-maintenance of boarding school graduates. Together with this, I suggest that we cannot ignore the fact that 80% of the graduates reported on their regular (yearly) participation in the boarding school Memorial Day ceremony. 10% of the remaining 20% reported that they attend less frequently. 10% (6 out of 60 interviewees) did not report participation in the memorial ceremonies.

[2] The findings of my study depict dramatic differences in the accounts of those who participate regularly in Memorial Days at the boarding school and those who do not participate. The latter do not perceive the boarding school as being directly responsible for their life achievements, nor do they experience two types of self (what I call "first nature" and "second nature" self). I am not saying this is the sole reason affiliated with the self-concept. The identity work that was executed at the boarding school (as a total institution) was dramatic and may explain the self-concepts that I discuss (also see: Shoshana 2012b). At the same time, it is important to point out that the choice of many of the graduates to participate in the annual Memorial Day ceremony is certainly very intriguing. Illustrating the structure and content of the Memorial Day ceremony, as I describe throughout the study, matches the reconstruction work of the self that was implemented at the boarding school. The integration of these two characteristics (the organizational work at the boarding school and the regular participation in the annual Memorial Day ceremony) has a significant influence on the maintenance of the self-concept among the boarding school graduates.

the boarding school, and from the social gatherings in the homes of graduates. Additionally, in order to build a complex understanding of the reconstruction of the self, I would like to begin with a description of the background leading to the boarding school's establishment, its objectives, and operational modes.

State and Self in Everyday Life: The Case Study of the Boarding School for Gifted Disadvantaged in Israel

The founding of the Boarding School for Gifted Disadvantaged in Israel in 1961 was closely linked to the attempt of State leaders to establish a state national identity in Israel's early years. Upon the establishment of the State of Israel in 1948, State leaders were occupied with what was then referred to as the "demographic threat," in other words—the fear of a Jewish minority and an Arab majority in Israel. One key solution found for this issue in the first years after the establishment of the State was to bring massive numbers of Jews from Arab countries to the new State of Israel. However, the migration of these Jews from Arab countries brought with it a new problem, called the "cultural crisis" (Shohat 1999). The dominant political elite in Israel (mostly east-European Jews) was troubled by the culture of these new-immigrant Arab Jews. This culture, described as "primitive," "traditional," and "anti-intellectual," was perceived as inappropriate and even dangerous to modern culture (defined as typical of European and north-American Jews, referred to in Hebrew as *Ashkenazi*) and to the model of the "new Jew" the State leaders wished to establish and encourage in the spirit of the West (Almog 2000). In order to solve this cultural crisis, the state educational

system in Israel was harnessed. Under these circumstances, the Boarding School for Gifted Disadvantaged started operating, and still operates to this day, offering an educational opportunity mainly to *Mizrahi* students from the years of early adolescence up through high school graduation. The main objective of the boarding school was phrased as follows:

An enterprise based on removing teenagers from their communities at the onset of adolescence, providing them with intellectual missions of high academic level requirements in high school, and placing them in competition with children of European origin from middle class families. (Smilansky and Nevo 1970:9)

This formal aim earned a number of specific definitions in the form of formal and non-formal education programs emphasizing three interventions: cognitive, emotional, and normative. *Cognitive intervention* included the development of thinking skills such as rationality, critical thought, increased ambition, postponement of gratification, and future-oriented self. *Emotional intervention* described features such as independence, initiative, and high self-esteem. *Normative intervention* mainly included exposure to what was described as quality cultural performances or cultural enrichment, such as going to the theatre and participating in book clubs. The means to these ends were varied: living in an inclusive institution (Goffman 1961) (physical distance from the family home; weekend visits home about once a month); a strict daily schedule including studying at school in the mornings alongside "middle-class students of European origin" (Smilansky and Nevo 1979:9); and numerous non-formal educational activities (such as visits to the

theatre). Students of European origin were used as role models to encourage the Oriental students to acquire the new cultural capital. These personal and cultural objectives were also described by the boarding school initiators as objectives able to fulfill *social functions*, such as communicating messages and limits to society members as a whole, and to the marginal groups within it: "Each of their group members can fulfill their aspirations for mobility and social status on a personal-achievement basis; it is unnecessary to demand status rights on an attributed-group basis" (Smilansky and Nevo 1970:11).

Interviews with the graduates show how they experienced their boarding school education as a positive event, responsible for their social-economic mobility. The boarding school education is described as a "rescue initiative" and as a gift of the State to its "ethnic" (Oriental) and "poor" citizens. The education in the boarding school is described as a life event that leads to the creation of a new self (Shoshana 2012a), including specific features (such as rationality, curiosity, ambition) that were not characteristic of the original, pre-boarding school self—the Oriental self, and the self still reflective of their family at the time. Actually, this self includes a specific reflexivity that embraces two types of self (the pre- and post-boarding school self—the Oriental self and the Western self) and two types of nature (first and second nature) (Shoshana 2012b). "Second nature" is an explicit term raised by a number of graduates. It refers to the ("Western") self acquired following the education received in the boarding school, which included a specific cultural capital better suited to "modern" life conditions. This cultural capital (or

second nature) is constantly experienced with reference to the first nature, described as "Oriental," "primitive," or "uncultured." Most of the boarding school graduates also described their need to maintain a distance from their first nature, identified with low socio-economic status and with a sense of ethnic awareness (Shoshana 2012b).

Ethnographies of Remembrance Days and Maintenance of the New Self

One of the recommendations that many graduates gave me was to arrive at the boarding school on Remembrance Day. When I asked, "What makes this day special?," the answers were more or less the same: "It's the essence of the boarding school"; "Without it, you can't really understand this place." These answers encouraged me to contact the organizers of Remembrance Day at the educational boarding school. In 2002, about a month before the national Remembrance Day ceremony in memory of the Fallen Soldiers of Israel, I met with the boarding school headmaster, introduced myself, and asked to participate in the Remembrance Day ceremony. I received his approval, accompanied by a challenging remark, "I have no doubt that this will help you understand this special place; that's all I'm going to say." Subsequently, I participated in two additional Remembrance Days. During the first Remembrance Day in which I participated (in 2002), I closely observed the structure of the ritual and its logistics, as anthropologist, Don Handelman (1998), suggested. On the second Remembrance Day (in 2003), in addition to unplanned observations, I wanted to conduct a planned observation of an issue that had caught my eye during my

first observation—the public exposure of what was defined as the boarding school graduates' "successes." On the third Remembrance Day (in 2004), after identifying the consistent participation of many graduates in the Remembrance Day ceremony, I tested, in a scheduled manner, the meaning of this consistent participation in a "public event" (Handelman 1998) among many of the graduates.

Three Ethnographies of Remembrance Days

The Form of Remembrance Day and the Content of a Celebration

The Remembrance Day ceremony is held in the boarding school's central courtyard, like any other Remembrance Day in memory of the Fallen Soldiers of Israel held across Israel on that same day. Upon arrival, at the entrance to the educational boarding school, about two hours before the ceremony began, I already found the boarding school headmaster standing and waiting to welcome the participants. At his side stood boarding school students, teachers, and instructors who had participated in the event's organization. The boarding school headmaster stood in the doorway of an iron gate, separating the boarding school premises—where the ceremony was to take place—from the area outside the boarding school. The headmaster shook hands with each graduate, after which he or she was free to enter the premises. Slowly, bunches of graduates began gathering in the area in front of the boarding school's entry gate, as I later found out, according to their graduating class. These groups of graduates were laughing, hugging, shak-

ing hands, and mostly engaging in nostalgic conversations. This part of the event took about two hours, until the boarding school headmaster asked everyone present to enter the central courtyard in which the ceremony was to be conducted. The structure of the Remembrance Day ceremony was no different than those ceremonies conducted in other educational institutions: State symbols (flags, candelabrum), candles, texts, songs, and a reading of the names of Fallen Soldiers (Lomsky-Feder 2004). The ceremony is typically quiet, in contrast with the commotion typical to what goes on before the ceremony. The graduates sit down in groups, according to their graduating class; for the most part, they are silent, as per the instructions of the ceremony's organizers. It is also worth noting that the ceremony itself is relatively short (about thirty minutes), compared to the entire event. After the declaration, "the ceremony has ended," participants return to the joyful commotion that characterized the event before the Remembrance Day ceremony, conducted in accordance with the Ministry of Education's guidelines. The structure of the post-ceremony celebration is similar in shape and content to the pre-ceremony interaction: cheers are heard, conversations take place among individuals gathering according to their graduating class, and graduates from different classes shake hands and become reacquainted with one another.

However, this third part of the public event has one unique feature. The groups of graduates sit down together and reminisce in a more organized manner than they did previously. Earlier, an individual recollected a certain experience and some of the others listened, but now this is done collectively,

and there is no jumping from one nostalgic memory to the other; the group lingers on the specific details of each memory. Moreover, what distinguishes this part of the celebration from the former interaction is that in the end, the graduates exchange telephone numbers and addresses, set a tentative date for a gathering, choose a number of graduates to be in charge of organizing it, and say goodbye. I believe we can best learn "what goes on Remembrance Day" from the words of Orna, a graduate of the class of 1983:

> **AS:** So what's so special about this place?
> **Orna:** Where else have you seen this kind of Remembrance Day?
> **AS:** What kind?
> **Orna:** The happy kind.
> **AS:** But, it's Remembrance Day.
> **Orna:** Yes, but it's also a happy day, like a special event, even like a wedding.
> **AS:** Why is it like a wedding?
> **Orna:** Each of us feels like a bride and groom, this place is our canopy … the boarding school is our parents … today, just like in the old days.

In order to promote our understanding of public events and the function they fulfill, Handelman (1998) suggests we identify their structure and internal logic. A day that is formally declared as a commemorative day, and which actually becomes a festive day ("like a wedding day"), raises an important question: How is it that one organizational form is "transformed" into a different organizational form? What is the internal logic of this structure and how is it related to the individuals' notion of self?

Remembrance Day at the boarding school, a death-related event, is filled with content reflecting that of a day of celebration, a life-event, or a celebration of life. It is worth noting that Remembrance Day does not only become a class reunion, as do many Remembrance Days in Israel (Lomsky-Feder 2004), but rather it becomes a *festive* event, a happy meeting, a celebratory day in Israeli culture. The reception in the entrance to the courtyard very much resembles the reception conducted by the parents in an Israeli family event (such as a wedding, *bar mitzvah*, or *brit milah*). The parents shake hands with the guests, and welcome them to the event. Similarly, the group gatherings according to graduating class may remind an observer of the seating arrangements at a celebration, according to category, such as "workplace," "friends," "family," et cetera. Even the structure of what was called an "acquaintance trip" resembles the rotation of acquaintance and thanks performed by the parents of the bride and groom, and the bride and groom themselves, as they visit and mingle among the guests' tables. Erez, a graduate of the class of 1995, expressed this in an interesting way:

> I've been to other Remembrance Days, and this one doesn't come anywhere near what you are familiar with. Don't expect grief, it's mostly fun [silence], it's more of a party. Not that there is sorrow for the dead and stuff like that, like we're used to, um, remembrance and all that [silence], it's probably strange for you, but that's how it is in the boarding school, there's a lot of strange stuff, out of the ordinary.

These words reminded me of the explicit wedding metaphor Orna had suggested, as described above.

One possible answer to the query, "How is it that a day of death becomes a celebration of life?," relates to the centrality of the "death" (symbolic death) and "life" (rebirth) features in the organizational work of the boarding school. My claim is that the Remembrance Day ceremony functions as a "charging" ritual. The structure of the ceremony charges (or recharges) the graduates' notion of self, using the same structure used years earlier when they were students at the boarding school—the detachment of one identity and the taking on of another identity (rebirth). Thus, I define *charging rituals* as those repetitive rituals that reinforce, and thus maintain, a personal, collective, or national identity. In other words, a *charging ritual* is a type of maintenance ritual that replicates a meaningful life experience through the repeated structure of the ritual. The words of Erez, a graduate of the class of 1995, draw attention to this charging aspect:

> There's no way I would miss the Remembrance Day ceremony, no matter where I am. In the army, they even wanted to put me on trial for splitting and coming here. But, nothing could keep me away, it's all just a waste of time, I need to breathe in the air of this boarding school once in a while, it's like an infusion, like a drug.

The symbolic death (the boarding school graduates' parting from their Oriental self and from their "first nature"), or actual death (Israeli Fallen Soldiers), and the experience of life (rebirth) that coexist within the structure of the charging ritual replicate the organizational identity of the boarding school, the personal identity of its students, and the national identity of its creators (the State

of Israel). The common features of the structure of Remembrance Day and the graduates' encounter with the boarding school is, as I shall describe in the discussion section, a case of the *sacrifice* of the subject for the good of the organization (the State or the boarding school) and the presence of absence (Handelman 1998).

The Pride of Giving a Gift (in Return)

On the second Remembrance Day I observed, I accompanied the boarding school headmaster on his "acquaintance trip." In a conversation he had with one of the graduates, who was then in basic training in the Paratroop Corps, the boarding school headmaster told the young soldier:

> Take a good look, Ofir, this is everything you need to see, everything you will be in a few years: second lieutenant, lieutenant, lieutenant colonel, I'll introduce you to him, and afterwards, it's not over. Ayelet is a law student, Hertzel has a successful private office. So go on, mingle, shake hands, it'll help you. I'm going to talk to Ami, he's the Israeli representative somewhere in the U.S.

One of the things that caught my attention was the many conversations about the achievements of the graduates participating in the ceremony, and the symbols of success associated with these achievements. The Remembrance Days observations allowed me to identify not only graduates of various ages and graduation classes participating in the event, but also graduates in the midst of different life stages. This identification was made possible mainly through symbols associated with life stages

or through verbal information communicated by the boarding school representatives and the senior graduates. The life stages were in accordance with the milestones of the "normative" socialization of the individual in Jewish-Israeli society:

Army → University → Post-University (professional occupation) → Marriage → Parenthood → Professional Achievements

Upon graduating from the boarding school, the graduates are recruited to the army, like other eighteen-year-olds in Israel. Here, the achievement-identity is already visible: recruits in selected army units (IDF uniform); soldiers who completed basic training in a selected unit (the red army shoes and red beret of the Paratroopers); officer training cadets (officer pins); young officers (second lieutenant, lieutenant), and senior officers who climbed up the ladder of military rank (lieutenant colonel). The next prestigious post-army step is attending the university. Here, too, one can identify the "successful self." The boarding school representatives only point to those students who study in the more prestigious faculties: law, accounting, medicine. The next obvious stages in the "successful self" life course involve finding an occupation, settling down, and establishing a family. In the acquaintance trip held on this day, the graduates are introduced to former students who have achieved prestigious profession: lawyers, doctors, academicians, et cetera.

I perceive the participation of various graduates in Remembrance Day and the indication of achievements as a symbolic act of giving a gift in return— the graduates are giving a gift in return to the ed-

ucational boarding school (a representative of the State of Israel). Many graduates report this explicitly. Moreover, the "successful self" is organized around an axis of gifts, moving forward linearly (basic training in a combat unit, serving as an officer, university, a prestigious profession), and the progression along this axis is a testimony of the deep and repeated imprinting of the new self the graduates were offered and took on in the boarding school.

Observations of the gatherings in the boarding school courtyard and the interviews I conducted with the event participants show that the central issues discussed on Remembrance Day are not related to death, but rather to life and the continual rebirth of the former boarding school students. The boarding school graduates pay tribute to the educational institution that is responsible, in their eyes, for this rebirth.

In light of the above, my claim is that Remembrance Day becomes a day of celebration in which the boarding school graduates pay tribute to the entity (the State of Israel) that gave them the gift (their new self) via their ongoing attendance at the ceremony year after year, their open praise, and the display of their gift-giving in the public courtyard of their own personal "house of creation." The praise given to the entity that bestowed the gift of new life is even manifested in a type of emotional and verbal admiration—of that "gift," which is perceived as given by the State. This admiration is positively manifested in the form of graduates who display this gift on the very day, and the fruitfulness of the entire educational enterprise (army promotions, prestigious uni-

versity faculties, prestigious professions, and even male and female graduates who decide to marry and have children together). The fixed admiration also maintains the relationships between the boarding school graduates and its operators via what Appadurai (1985) described as asymmetrical gratitude between social classes. Many graduates report a chronic gratitude or appreciation to the boarding school as a representative of the State. Appadurai (1985), who described an exchange of gifts between and within Tamil social classes, showed how praise to the gift-giver appeared under structural or permanent relations of subordination. A farm laborer could not praise the "thickness of the cloth" or the "sweetness of the rice" that he received from his patron, so as not to appear insubordinate. He must praise the patron (the gift giver) rather than the gift itself. Praising the gift itself is reserved for individuals from the higher class.

A "Root Trips" to the Second Nature

> You come here and take in the smells, look around the rooms. You see a drawing on a tree, a souvenir you once hid … It gives you strength, reminds you where you came from and where you are going. It's more than that, though, you know? It's like, like, it's like, um, it's like a sacred place … every time I come here, even the air here is different, my breath. (Rachel, graduate of the class of 1977)

Rachel's description is not uncommon. Many other graduates, mostly those who arrive each year at the boarding school on Remembrance Day, describe their participation in the ritual as something that distinguishes between the world of sanctity and that of

profanity, in Durkheim's (1915) sense. Tzipi, a graduate of the class of 1987, whom I interviewed after my first Remembrance Day observation, described her experience in religious terms. Her answer to my question, "What's special about this day?," aroused my curiosity: "It starts long before the actual day because we plan it in advance, we carpool. You see, we make a day out of it. We go back to being kids, as if twenty years gone by." I met Tzipi again on the second Remembrance Day in which I participated, and in our conversation, she once more described the "early preparations" she mentioned (the carpooling) and she offered, seriously or not, that I join them next year.

About two weeks before the Remembrance Day celebration at the boarding school in Jerusalem, Tzipi called me and said: "A few friends from the boarding school are getting together next Thursday at my house, it might interest you, you can kill a few birds with one stone." I immediately replied that I would love to join them and asked what the purpose of the gathering was. Tzipi explained, "Oh, we meet every year a few days before Remembrance Day." I asked: "Who participates?" Tzipi replied: "It's been the same group of friends for the past 10 years or more, close friends from the boarding school." I asked again about the purpose of the gathering, and Tzipi said, "There's no particular purpose, it's become a tradition, just a pleasant evening. Of course, we talk a lot about the boarding school, so I thought it would be appropriate if you came." The social gathering took place on a Thursday evening at Tzipi's house. The gathering included eight former students, four men and four women. When I arrived at Tzipi's house at 8 p.m., I found Eli helping Tzipi

arrange the yard before the other friends arrived. Tzipi introduced me to Eli, and he added: "So you're studying the boarding school. Wow, you'll get plenty of good material tonight."

This kind of gathering has traditionally taken place every year since 1994, a few weeks before Remembrance Day, with a regular core of eight graduates, who also faithfully attend the Remembrance Day ceremony in Jerusalem. It is worth noting that the graduates' spouses do not come along. I asked Tzipi and Eli why, and Tzipi replied: "It doesn't work, we tried it one year and it was bad. You remember, Eli, it wasn't the same, so we decided to stop it." As for the evening's plan, Eli said, "A lot of food and laughs, nothing heavy." Tzipi replied: "Mostly food, like in the boarding school, you'll see, we have a barbecue, everyone brings something … we remind each other of experiences from the boarding school. Like I told you before, you'll see for yourself, we go back to being kids."

Gradually, the other six graduates arrived at Tzipi's front door. Each of the graduates was welcomed with hugs and kisses, after putting the dish they brought for the evening on the table. It is worth noting that every participant, so I was told, brings the same dish every year. When I asked Ilana why, she answered: "Each of us brings something from our family home. I'm Kurdish, so what do I bring? Kube." When I asked Shuli what she had brought, she said: "My specialty is stuffed vegetables." Amos commented: "Moroccan food, what else?" Right after that Eli came and urged Amos to "start the fire." Amos complained and replied: "Every year I get stuck with it." "Get stuck with what?," I asked. "The grill, the barbecuing." Ila-

na and Shuli laughed, and Shuli commented: "He never stops complaining, even when we were in the boarding school he was a whiner. Even then he used to barbecue on Independence Day, on Lag Ba'Omer. Nothing changes." Ilana added: "But, we forgive him, nothing beats his kebab."

At this point Kobi told us to take a seat around the table in the yard and start eating. During dinner, I expressed my special interest in the timing of the gathering (before Remembrance Day). Dudi replied, "There's no special reason, it just became a tradition." Tzipi said: "Yes, but I think that what we have here doesn't exist anywhere else ... we've had experiences together, I'm being serious now, tough experiences." When I asked Amalia whether she agreed, she replied, "Totally, but it's a bit absurd. [Turning to Tzipi] How do you explain the fact that, all in all, we came out okay?" Tzipi replied: "That's beside the point, but there was pain, you're just forgetting." Tzipi turned to Eli and encouraged him to tell me how they both picked up two other friends, who lived in towns in the south of Israel (including entering Kiryat Gat, a development town), on the way to Jerusalem.

"The trip brings us right back to the boarding school, even the stop in Kiryat Gat," Eli explained. "Why?," I asked. "Because all development towns look the same," Eli replied and smiled at Tzipi. When I asked them both to explain what he had just said, Eli replied: "I thank God, or better yet, the boarding school, that I didn't stay there. I could have easily stayed there."

Now Shuli joined in on the conversation and asked: "What about Kiryat Gat? Did they treat you nicely?

... Because if they didn't, I'm sending them back to Kiryat Gat." Eli and Tzipi laughed and explained to Shuli that we were talking about "the places where we came from, like Kiryat Gat." I said that I had asked them to explain their attitude towards Kiryat Gat, as a model of a development town in their eyes. Shuli said, "There's not much to tell. It's an ordinary development town. It just reminds us of the boarding school because the boarding school saved us [from living in a development town]." Tzipi replied: "Here we go again with the saving. It's not exactly that, I don't agree." Shuli claimed that Tzipi "always liked to see the glass half full … she'd always been a romantic, she tries to see the best in everyone. It's nice, but it's also optimistic." Eli told her: "You don't want to change," and turning to Tzipi, he commented, "Why don't you tell him about our annual outing … every year we eat someplace else." Tzipi laughed and explained that it is an "inside joke." I asked them to fill me in on the joke, and Tzipi replied: "Where do we eat? Every year we eat at Sima's [an Oriental restaurant in Jerusalem]." Shuli added, "Eli was always interested in where we were going to eat, even at the boarding school, it was his job." Eli replied: "I hear you complaining, maybe this year we'll go to a different place." Tzipi swiftly replied: "Don't start, who are you kidding, anyway, every year we talk about going to a different restaurant, it's not going to happen. Sima is us, come off it." I was interested to know why they chose Sima's restaurant. Eli replied: "Where can we go, to 'Eladve'Ze-hu' [literally: 'Elad and that's that'—the name of an 'Ashkenazi' restaurant in Jerusalem], it's not appropriate, we prefer 'Simave'Zehu.'" They burst into laughter, and laughed for a long time. In the

end, I asked why Sima is more appropriate. Eli replied: "Take a good look at us, don't you think Sima is more appropriate?" I did not let it go and pressed them for an answer. Eli said, "I don't know, it's just more appropriate." Tzipi interrupted him and said: "He meant that boarders won't set foot in 'Eladve'Zehu,' it's not appropriate. He's right." I told her: "But, you're no longer boarders." Tzipi immediately responded: "Honey, being a boarder is in your genes, write that down … boarders sit at Sima's, period." Eli looked at me and said: "I told you, she's fearless."

I wish now to portray the boarding school as a site of "pilgrimage" for maintaining personal and community identities (see: Howe [2001] for a description of the pilgrimage to San Francisco by many homosexuals, as a practice for maintaining personal and collective identities). The graduates leave their new home, where their ("Western") boarding school self exists (prestigious towns), pass through the regions of their past ("Oriental") identity (preliminary gatherings, entering development towns and Sima's restaurant), and arrive at their place of (re)birth—the center of their second nature. The term "second nature" was explicitly used by a number of graduates who referred to the self acquired following the boarding school education and fitting the institutional self, including values of meritocracy, entrepreneurship, self-reliance, or what was also referred to as the "Western self." My claim is that the pilgrimage replicates symbolic death, rebirth, and especially a therapeutic sense of spiritual and cultural redemption, in the same way it occurred during their childhood, and as occurs on all types of pilgrimages (Turner and Turner 1978).

In order to support my claims concerning the graduates' pilgrimage, I shall henceforth describe the occurrences, starting with the moment when the graduates arrive at the "pilgrimage site" (the boarding school) in Jerusalem.

Upon arrival at the boarding school gate, the graduates first greet the boarding school headmaster, who shakes their hands and allows them to enter the boarding school premises. It seems that most graduates know the boarding school headmaster. Thus, the boarding school headmaster serves as a sort of barrier between the inside of the boarding school and the outside area, and he is the one who permits graduates to enter. This makes the passage through the gate a type of ritual, clearly distinguishing those who are outside from those who are inside. Upon entering the gates, the participant "passes through" as a graduate. The Remembrance Day ceremony begins with the words of the boarding school headmaster. His speech explicitly presents the self recharging function. The boarding school headmaster clearly emphasizes the purpose of the ceremony:

Hello everyone, I'm happy you came. This is a difficult day for the State of Israel, but like in Israel—grief and joy go together. We have convened today to pay our respects to the dead, those who sacrificed their lives for the country … I look at you and I'm filled with pride … This happens to me every year and I am still surprised anew, each time, you are the true pride … every year coming from afar, this is our real success … good education can rescue you from the bottom … we are the proof … that you don't have to be stuck in the periphery … This is a difficult day, but this is also a special day for us, the boarding school family

… and the Israeli family … I've been in the field of education for many years now … I've worked in many organizations, but what goes on here is truly unique … this is our success … I'm sure you, too, feel how easy it is to go back to childhood … you just need to go inside … We will begin the ceremony, but remember it doesn't end here … We all know we're not only here for Remembrance Day.

If, thus far, the symbolic death (as a disadvantaged individual or Oriental) and rebirth as a student (or graduate) of the boarding school (or as a new self) were unclear, now the boarding school headmaster has explicitly declared it. After the ceremony ends, the graduates gather according to their class once again. This time, the conversations are different. Now the graduates begin to exchange telephone numbers, set dates for upcoming gatherings, try to set a date for a class reunion, and mostly promise to "keep in touch." If, before the ceremony, the sense of *communitas* (Turner 1969) primarily included "recollection actions" (Urry 1990) about constitutive moments related to the second nature (or the new self), after the ceremony, it includes plans and action for the future maintenance of this sense of sharing a "common destiny." The structure of Remembrance Day and the sacrifice it entails encourage, as I shall describe below, the experience of transformation, necessary for the maintenance of the "second nature" or the reconstructed self.

Discussion: (Re)Charging the Self

The case study of the Boarding School for Gifted Disadvantaged in Israel raises a number of questions, important for understanding the maintenance of the reconstruction of the self: Why did the heads of the boarding school specifically choose Remembrance Day, which contains the presence of absence (Handelman 2004), as the annual meeting day of its graduates? Why do so many graduates insist on participating regularly (every year) in this ritual? Why does a one-time dramatic "pilgrimage," typical to a root trips back to one's "first nature" (Feldman 2008), not suffice in this case? What is it about the form and content of the public event (Handelman 1998) that fulfils the transformation of the self or the replication of the experience of reconstructing the self?

Many interviewees described how, over the years, various attempts were made to arrange a gathering of boarding school graduates on Independence Day or during the summer vacation, instead of on Remembrance Day, usually identified as a day of death. In other words, various graduates tried to separate the graduate gatherings ("a day of celebration") from Remembrance Day ("a day of death"). This point may be an answer to the question of why Remembrance Day was specifically chosen as a day of celebration. The replication of the graduates' life experiences takes on a special meaning on Remembrance Day. My claim is that the structure of Remembrance Day reflects a type of shortcut (has heuristic qualities) since Remembrance Day, according to the rationale proposed by Handelman (1998), is a day of sacrifice that includes elements of the *social drama*, necessary for the personal (graduates), institutional (boarding school), and national (State of Israel) narratives. The structure creates the narrative meaning necessary for maintaining the special self created in the boarding school.

This claim is based on the explanation that Handelman (2004) suggests for the structure of remembrance rituals in Israel (Holocaust Remembrance Day, Remembrance Day in memory of the Fallen Soldiers, Independence Day). According to Handelman (2004), this semiotic structure creates a narrative meaning and is not "coincidental," "natural," or "necessary." This structure offers a specific narrative for the citizens of Israel, which serves the Zionist (national) cosmology in Israel—from ruin to redemption, from holocaust to revival, from chaos to cosmos (Handelman 1998:231). Holocaust Remembrance Day reflects the chaos of the past and is a warning against contemporary potential dangers; Remembrance Day in memory of the Fallen Soldiers reflects the battles that have been necessary to maintain the nation State; and finally, Independence Day celebrates victory, the present condition of the nation State. The result of this narrative structure is a reconstitution of Jewish national identity in Israel. Similarly, I argue that the structure of the ritual and its contents, linking the day of death and the day of celebration, "charges" the boarding school graduates and maintains their reconstruction of self, closely related to the national identity of the State of Israel. This charge is manifested not only symbolically (the link between death and rebirth) but also via replication of the logic upon which the boarding school's organizational work is based—the conversion of the Oriental self to a Western (or "Israeli") self, or replacing the first nature with a second nature. The Western self or the "second nature" are described, by both the boarding school authorities and the graduates, as necessary for the establishment and maintenance of the State of Israel and its survival under the conditions of modern life.

This charging also means a replication (or current contemplation) of the unique reflexivity of boarding school graduates, following their participation in an assimilation-directed State organization. The research findings show how graduates contemplate "first nature" (Oriental self) and "second nature" (Western, Israeli, or modern self) or their proximity (via personal characteristics, achievements, or cultural tastes) to each kind of nature. This reflexivity means a contemplation of the "presence of absence." This *absence* relates to the characteristics (identified as "Oriental" or a notion of self) that existed prior to the boarding school experience. Participation in the Remembrance Day ceremony in the boarding school courtyard is a reminder of the act of conversion performed in the boarding school, which reflects, inter alia, the presence of this absence.

The practice of participating in Remembrance Day is supported by a series of additional practices that charge the new self and reinforce the reconstruction of the self process, which first occurred during the graduates' boarding school days. Some examples of these additional practices are: the social gatherings that take place about a week before Remembrance Day; in these gatherings, the operation of a *habitus* considered to be "Oriental" (Oriental speech, eating Oriental dishes, listening to Oriental music); the joint trip to the boarding school on Remembrance Day; eating in an Oriental restaurant; the exposure to symbols associated with the new self; and recollecting old memories with former classmates. These acts, alongside the regular practice of participating in the Memorial Day ceremony, fulfill a critical role in the maintenance of the new self, years after it was first constructed at the boarding school. This research objective—understanding the ways in which subjects maintain the reconstruction of their self over many years—must continue to occupy the minds of all those who take interest in ethnographies and changes in the self, as well as those who are curious about the processes affiliated with the social construction of reality.

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The Postgraduate Supervisor Under Scrutiny: An Autoethnographic Inquiry

Abstract   Effective postgraduate supervision is a critical indicator of individual scholarship and institutional reputation. This paper uses autoethnography to scrutinize critical moments in the author's enactment of the supervisory role over a lengthy career at a distance education university, where supervision takes place through face-to-face consultation, distance education, or a combination of both modes. Autoethnography, an innovative addition to the compendium of qualitative research methods, is gaining prominence as a means of examining the academic life through the personal and professional histories of individual academics. The author's aim is to focus both inward on the vulnerable self as expressed in the role of academic supervisor and outward on the social and cultural aspects of this role as it is shaped within the context of the university. This has been done by constructing a text with a high degree of self-reflexivity, which combines evocative and literary elements with some explicit theorizing around generativity theory. Generativity is defined as an adult's concern for and commitment to promoting the well-being of the next generation, in this case, the intellectual well-being of future cohorts of scholars. Against the framework of generativity, a series of autobiographical vignettes illustrate self-defining moments in the author's development as supervisor. The role of memory and memory supports in producing an accurate story and measures taken to interact with the characters in the stories to enhance textual credibility are addressed. The vignettes illustrate the desire to conduct supervision as a generative act; cultural demand for generativity; the transmission of a personal aesthetic in supervision; the separation-individuation of the student; the redemption of generative commitment in the face of threats to generativity; and the perpetuation of the generative cycle. I conclude that autoethnography as method presents a useful route to both self-understanding and social understanding of the academic life, with particular reference to the role of postgraduate supervisor.

Keywords   Postgraduate Supervision; Autoethnography; Generativity; Generative Commitment; Vignettes; Self-Defining Memories

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Postgraduate supervising is one of the primary tasks of an academic. Beside one's own research, supervising probably consumes the greatest amount of time and energy in the daily round of academic labor (Austin 2011). Postgraduate supervision is also a critical indicator of institutional research reputation and of individual intellectual leadership (Delaney 2008). The image we have of ourselves as supervisors and the stories we relate about the relationships, achievements, and mishaps experienced during postgraduate guidance (as well as the incidents deliberately omitted in our self-representation) form an important part of our identity as scholars. The goal of this paper is to examine postgraduate supervision through the lens of my experience as a supervisor of more than forty students over a lengthy career played out at a distance education university in southern Africa using autoethnography. In so doing, I reflect on how my practice has been shaped by this specialized space, as well as my own vision and embodiment of supervision.

The university where I work is classified as a comprehensive institution which reflects a mixed academic and vocational mission over a predominantly research mission (Botha 2011). Postgraduate education is massified and a full professor is expected to supervise at least ten research degree candidates at a time. Supervision is carried out through a single or a mixed mode of delivery, depending on students' geographical location: face-to-face consultation and/or e-mail, telephonic contact, and written correspondence. Shifts in delivery modes are the result of technological developments—when I began my career thirty years ago, students' work arrived in brown manila envelopes in the staff post room and the supervisor's notations were penned in the margins of the texts before the document was mailed back for revision. Today written correspondence is exclusively via e-mail and supervisory commentary is made e-documents.

To interrogate this normally taken-for-granted part of my academic life (Van Maanen 1979), I have opted for autoethnography. Autoethnography is a qualitative research method, variously referred to by different writers as self-narrative, personal narrative, auto-observation, first-person account, and personal ethnography (Walford 2004). Schwandt (2007:17) defines autoethnography as "a particular form of writing that seeks to unite ethnographic (looking outward at a world beyond one's own) and autobiographical (gazing inward for a story of one's self) intentions." Holman Jones, Adams, and Ellis (2013) extend this definition to include all aesthetic projects in autoethnographic work, such as poetry, painting, film, dance, photographic essays, and dramatic performances. In autoethnography, the researcher occupies a unique place as a participant observer of his/her own experience, and is thereby engaged in constructing a portrait of self rather than that of the Other (Tillmann-Healy and Kiesinger 2001). The use of the researcher as intentionally vulnerable subject is not just allowed but also validated (Holman Jones et al. 2013). Gannon (2006:475) explains, "[i]n autoethnography, the subject and object of research collapse into the body/thoughts/feelings of the (auto) ethnographer located in his or her particular space and time." Autoethnography also aims to link the self with the social and cultural world—the self in relationship with others in a social context. It explores how the self has been influenced and molded

by the surrounding context and how the self has responded and reacted to, or resisted, contextual influences (Ellis 2004). Thus, autoethnography is a tool for individual, as well as social understanding (Ellis 2007). Further, autoethnographers endeavor to make themselves vulnerable in the texts they create by "making personal experience available for consideration" (Holman Jones et al. 2013:24). By drawing attention to vulnerabilities that human beings share but may normally hide, autoethnographers create evocative literary and analytic texts whereby they seek a reciprocal relationship with the reader in order to educe a response that is not only cognitive but also emotional, and even physical (Holman Jones et al. 2013).

The origins of autoethnography can be traced to the post-Chicago school of sociology in the United States (U.S.) during the 1970s. During the early 1990s, autoethnography as an emerging qualitative method was nurtured by a growing contingent of social scientists who had roots in sociology, anthropology, and communication, and who were mainly located in the U.S., Canada, and Britain. Autoethnography quickly gained currency after its inclusion as innovative newcomer to qualitative inquiry in the authoritative *Handbook of Qualitative Research* (Denzin and Lincoln 1994) and subsequent issues of the same. In particular, Carolyn Ellis, professor of sociology and communications, University of South Florida, championed and developed autoethnography (Holman Jones et al. 2013). In the 21st century, the application of autoethnography across academic disciplines has burgeoned in the Anglo-American literature dedicated to qualitative inquiry (Douglas and Carless 2013). Nonetheless, autoethnography is

still surrounded by some debate concerning theoretical and methodological issues. In particular, it has been critiqued for a lack of theoretical engagement (Gannon 2006). Central to this debate was Anderson's (2006; 2011) attempt to distinguish between two broad types: the evocative, literary autoethnography, as exemplified by Ellis' work, and analytic autoethnography. Evocative autoethnography explicitly aims to engender an emotional resonance in the reader with the author, and its usefulness as therapeutic tool for both author and reader is strongly defended. The form and register of the evocative text is poetic, performative, and literary; the emphasis lies on the story (Holman Jones et al. 2013). In contrast, analytic autoethnography functions predominantly as a theoretical tool to analyze and interpret a broader set of social phenomena (Anderson 2006). More recently, scholars (Ngunjiri, Hernandez, and Chang 2010; Tedlock 2013) reject the idea of a binary model with the evocative and the analytic as opposite poles in favor of a continuum along which exemplars of autoethnographic writings can be positioned, depending on the researcher's goals and the predominant features of the writing project.

Against this background, I have found in autoethnography a creative tool to render the self, inevitably present in the background of any research project, more visible and active in the text, thus adding a valid dimension of human experience, which could contribute richness and color to the findings and allow for deeper levels of reflexivity. However, as a postgraduate supervisor with some reputation, even if only in my modest local sphere, this choice involves deliberate risk—what must emerge are my weaknesses, as well as strengths. Instead of an ide-

alized portrait of myself, I wish to bring my own frailty into the text as I examine the layers that make up my supervisory self. Autoethnography offers me an ideal means to plumb the concealed world of the academic wo[man] and extract the untidy educational and personal history that lies beneath my careful chronological curriculum vitae, with its deliberate omissions and inclusions (Brodkey 1996). Thus, in this paper, I have purposefully "brought insides outside, unearthed knowledge, and exposed at least a little of those secret elements of academic life about which we are not supposed to speak publicly" (Learmonth and Humphreys 2011:113). My intention is that this transparency will invite a response in which, emboldened by my story, the reader will come to grips with his/her own self and to engage in conversation about his/her own professional struggles. Finally, with due consideration to the possibilities of autoethnographic writing in terms of the styles and strategies of composition, which range from the artful and creative text to the more analytic kind (Tedlock 2013:358), this paper "braids" evocative realism with some explicit theorizing based on generativity theory as expounded by Erikson and developed by McAdams, de St. Aubin, and others (see below). I have applied this theoretical framework to my story of postgraduate supervision as it exemplifies the key concepts of generative desire, care, commitment, redemption, and belief.

Generativity Theory and Supervision

Erikson's (1950) life cycle model of human development proposes that a person passes through eight stages from infancy to late adulthood. In each stage,

the person faces, and should resolve, a developmental crisis. A crisis represents a turning point for the person rather than a catastrophe—"a crucial period of increased vulnerability and heightened potential for development" (Erikson 1978:5). The successful resolution of each developmental crisis produces a virtue or strength appropriate to that stage, which adds to the person's competencies and abilities and makes him/her more able to face the crisis of the following stage of the life cycle. Poor or regressive development is the result of a failure to resolve the crisis of a life stage successfully. Thus, each stage builds upon the successful completion of earlier stages; crises of stages not successfully completed may be expected to reappear as problems in the future (Erikson 1978).

Erikson's seventh stage of adult development is the long stretch of midlife, flagged at approximately 35-65 years (Erikson 1950) or 65 years + in the 21st century (Batesman 2010). The central task of midlife is the achievement of generativity versus its opposite pole, stagnation. Generativity is defined as establishing and guiding future generations through the creation and maintenance of a wide range of institutional, cultural, and individual resources that are necessary to sustain intergenerational solidarity (Erikson 1964). To have and raise children is a typical generative activity, but generativity extends beyond a deeply held concern for one's biological offspring to the next generation to which one's own and/or other children belong (McAdams and Logan 2004). The self-centered person who is unable or unwilling to help society move forward through generative actions is stagnant and frustrated by his/her relative lack of productivity. Holding the poles

of generativity and stagnation in a dynamic and sound balance is essential to produce the emergent virtue, that is, care for persons, products, and ideas (Erikson 1978). The benefits of generativity are bi-directional: the generative adult creates legacies of self to benefit future generations, while simultaneously reaping a sense of meaning, which is incorporated into his/her self-identity and which combats despair during the final life stage, old age (Erikson 1964).

Many scholars have built on Erikson's seminal theory of generativity. Consequently, generativity has been developed into a complex, multidimensional construct, which has been richly applied in diverse disciplines (Schoklitsch and Baumann 2012). A selective overview is given of the most significant of this scholarship. Kotre (1984:112) was the first to redefine generativity as the desire and effort to invest one's life and one's work in that which will "outlive the self." He (Kotre 1984) expanded the concept by proposing two modes of generative expression: agency and communion. Agency involves the expansion of the self through creating something that is self-promoting; communion includes giving what one has created to others for their benefit and use (de St. Aubin 2013). According to Kotre (1984), generativity exists in four domains: the biological (as in procreation), the parental (as in child-raising), the technical (as in teaching knowledge and skills to others), and the cultural (as in creating and passing down a product in which the self is expressed). Generativity theory has been further extended by the individual and the collaborative work of McAdams and de St. Aubin over more than two decades. McAdams and de St. Aubin (1992) (also McAdams, Hart, and Maruna 1998) produced a seven-dimen-

sional theory of the process of generativity. According to this model, generativity functions in terms of seven interrelated features: 1) an inner desire for agentic and communal legacy combines with 2) cultural demand embodied in age-related social norms for the adult to produce outcomes to benefit the next generation, which in turn produces 3) a concern for the next generation. This concern is boosted by 4) a belief in the worthwhile nature of the human endeavor, and this leads to 5) a commitment, which produces 6) generative acts defined as creating, maintaining, or offering what has been created or maintained to the community. This may embrace caring for children (one's own and those of others) transmitting traditions, knowledge, and skills, investing in one's community as guide, mentor, and leader, and/or producing creative works that survive the self. Finally, the adult captures his/her generative action by constructing 7) a narration of generativity, which is part of the individual's broader life story that makes up a person's identity. The life story may in itself be part of one's legacy offered to others who may benefit from knowing about one's life (McAdams 2001). Thus, generativity scholarship revolves around the life story, and this emphasis intersects with the loosely-coordinated, interdisciplinary movement in the social sciences, the narrative study of lives (McAdams, Josselson, and Lieblich 2006; Clandinin 2007). However, the life story in all its variations as it features in the narrative genre is allied to, but not synonymous with, autoethnography. Life stories as data are generally elicited from a participant and interpreted by the researcher (Trahar 2009). The study of generativity in life stories, as applied by McAdams (2006), de St. Aubin (2013), and others, is extremely valuable

for their portrayal of storied human experience, but storyteller and story analyst do not coalesce as they do in autoethnography.

An accumulation of generative desire, commitment, and action nourishes and sustains social norms around generativity, and may eventually contribute to institutions with a generative character and mission, which have the potential to produce a generative society (McAdams 2006). Ball (2012) interrogates the function of the university as generator, transmitter, and curator of knowledge in the light of generativity theory. Teaching and mentoring activities directly address intergenerational cultural transmission, and university-community engagement is an opportunity to enact generative care for others as is research in the service of humankind. However, as McAdams and colleagues (1998) argue, generativity is not automatic; generativity as related to academe is only realized when academics execute the university's mission out of a deliberate concern for others, and not as a series of disinterested acts of self-interest (Melo 2008).

In the light of this exposition, I conclude that generativity theory is a useful analytic tool for an understanding of my own history as postgraduate supervisor. Postgraduate supervision, as a form of mentoring, shares similarities with the prototypical generative act of parenting—the nurture of a protégé's latent abilities, material support, emotional encouragement, and the correction of weaknesses, all aimed at the attainment of the charge's eventual independence (Lemmer 2014). Like all authentic generative action, postgraduate supervision promotes the development of others and is

rewarded by experiencing another's development as if it were one's own (Urrutia et al. 2009).

Method: Constructing the Text

Writing autoethnography for publication challenges the researcher to provide sufficient attention to methodological detail to meet the accepted standards of conventional academic work, yet without compromising the attention given to the ultimate product, the story (Wall 2008). With this in mind, I have provided a brief audit trail, tracking how I carried out data gathering, report writing, analysis, and the implementation of measures to enhance credibility. Autoethnographic data collection and analysis is systematic and intentional, thus distinguishing it as a research method from other forms of personal writing (Chang 2008). Ngunjiri and colleagues (2010) identify four phases of autoethnographic writing: the preliminary phase (self-writing and reflection); the subsequent phase (additional data collection, self-writing, and reflection); data analysis and interpretation (data review and coding); and report writing (meaning-making and outlining). In practice, these phases are seldom as neatly packaged as these authors have suggested. I constantly moved between the different phases of writing, frequently working in all four phases during a single writing session.

In the preliminary phase, I created an accurate chronological record of the postgraduate students whom I have supervised over a period of twenty-five years by using the electronic archival records of my institution. In the subsequent phase, I wrote notes on the students who featured most prominently

in my recollected experiences as supervisor. The reasons for my choices were eclectic: students who became close friends; promising students who initially lacked the required admission requirements for the degree and for whose admission I had waged bureaucratic battles; students who were also colleagues at the university; students who completed the thesis solely through distance education without any face-to-face supervision; and a student whose thesis was referred back by the examination panel for revision and re-examination. Notes were enriched by reconstructing conversations and settings. My reminiscences were honed by documents and artifacts: students' theses in the institutional library and on my bookshelf; photos of graduation ceremonies and celebrations; students' thank-you cards, letters, and poems; and reflective notes which I made at the completion of each student's work. Yet, in all this, memories were the primary building blocks of my story, and the process of recall was alternatively systematic and disorderly (Gorgio 2013). Memories considered for inclusion in the autoethnography met Pillemer's (2001) criteria for personal event memories: defined temporal and geographical location, specificity of personal circumstances, sensory images, the association of the image to a particular turning point in life, and the conviction that the memory in question is a faithful representation of events. The chronology of time was often abandoned for the chronology of emotion (Ellis 2009); inspiring memories spontaneously elicited more of their kind, as did painful memories or "memories with a sting" (Denzin 2013:126). In the third phase of data analysis and interpretation, I loosely used generativity theory, as already mentioned, to abstract and explain the social processes involved in my life

and work as supervisor. Finally, to structure the report, I opted for a series of six vignettes to illustrate the most significant discoveries about myself as supervisor. Vignettes were a useful narrative strategy to carry my protracted story forward (Humphreys 2005). Vignettes record epiphanies in a character's life (Plummer 2001), that is, "critical biographical experiences … existential turning point moments" (Denzin 2013:131), when one's motives and emotions are illuminated by intentional self-reflection. In this vein, I organized my drafted notes around striking moments revolving around a relationship, a process, or an emotional experience. This was followed by a process of making a final strategic selection of the vignettes for inclusion in this paper (Ellis, Adams, and Bochner 2011). Finally, I sought some kind of validation for my story through the testimony of others, that is, the "characters" present in the story. This linked to the autoethnographer's responsibility to behave ethically concerning the disclosure given to others in a self-narrative (Ellis 2004). I fulfilled this commitment by engaging, where possible, with the key persons featured in my text (Ellis 2007) so that they were aware and consenting about any references I had made to them.

Vignette 1: Origins of Generative Desire

One winter's afternoon in 1979, my mother and I sat in my children's bedroom. The lawn outside the window was burnt brown by the early morning frosts. The air was dry and harsh. I was crocheting intricate lacy squares in cheap red wool. My mother knitted. My two little girls were fractious with winter colds and their irritable whines frequently interrupted us. Suddenly my mother looked up. Her

glance took in the whole room—the bargain-basement furnishings, the make-do illustrations with nursery rhyme characters gummed to the walls in lieu of real pictures. "Look where you are today!," she said in a brittle voice, "Your father and I wasted our money on you by sending you to university! It never got you very far." I froze. I bent my head over my work and pretended I had never heard her reproach. The cheap yarn scratched and stuck to the crochet hook. The children coughed. I blinked at the pattern. I could not even crochet properly and what was more, my mother was right. I had never put my university education to use—only a year's experience in a special needs school, where I had not even taught English Literature, my major. I was defenseless before her rebuke. The worst thing for a daughter from a hardworking, middle class background like mine was to disappoint her parents. And I had let my parents down badly.

A decade later, my parents, my family, and I were seated in the grand hall of the university where I was now senior lecturer. During my thirties, I was enabled by my own agency combined with a set of serendipitous circumstances to resurrect my abandoned ambition to pursue further studies. In less than five years, I acquired three postgraduate degrees through distance education and secured a position at the very institution that had helped me realize my aspirations. That night as we awaited the first notes of *Gaudeamus Igitur* to usher in the academic procession, I studied my parents from my front row seat reserved for doctoral candidates. They were seated in upper balcony of the tiered auditorium with my daughters sandwiched between them, my father in his dark suit, my mother in grey

silk purchased for the occasion. My dad was searching his pockets for the ever-handy peppermints to give eleven-year-old Cath to suck for distraction. Ruth at thirteen stared ahead. My parents were proud; my husband, a fellow academic, in cap and gown, beamed at me from the dais; the girls were bored, but proud. So, I thought to myself, my parents' hard-earned money was not wasted. I had "got somewhere" after all. I had been afforded a second chance at a distance education institution that offered mature students the opportunity to combine employment with part-time studies. Deep within me I resolved to pass on this good fortune to every other second-chancer who knocked at my office door. The joy could not, would not, be hoarded.

Today these two dialectical memories embody the first step in the generative process, the birth of an intense desire to pass on an intellectual legacy to my postgraduate students (McAdams and de St. Aubin 1992). Together, the events made up the "crystallizing moment" (Gardner 1993:44), which birthed an idealized image of the kind of supervisor I longed to be and of supervision as a generative activity. This was not impulsive whimsy in response to the occasion of my graduation as doctor of education. I determined that my opportunity to have made good should feed into someone else's hopes, dreams, and aspirations (McAdams 2006). As Karpiak (2000:130) puts it, "the crisis as call"—my ambition of an academic career, once humiliatingly lost, now regained—became the lynchpin around which I organized lengthy academic career. I committed consciously to conduct myself, not solely in self-interest, but as one who had a worthwhile legacy to bequeath (McAdams et al. 1998).

Vignette 2: Cultural Demand for Generativity

If generativity's deep-seated roots lie in individual desire, cultural demand may be regarded as its external motivational source (McAdams et al. 1998). The social and cultural setting of my university provided the occupational and ideological framework for supervisory practice and the extent to which my generative interpretation of supervision was encouraged. When I was allotted my first postgraduate student, no formal training opportunities in the role of supervisor existed, although such training is freely available today through the frequent presentation of professional development workshops at my institution. My notion of how I should behave as a committed supervisor was modeled to me by the life and work of my own doctoral advisor, Professor O. Fittingly; he handed me the torch on an oppressively hot summer's morning in February 1990. "Mr. N., may I introduce you to Dr X. She'll be supervising your Master's study and I, of course, will be on hand if either of you need me." Professor O. ushered a middle-aged man, formal in suit and tie, into my small, starkly furnished office on the 6th floor of the high-rise building which housed the Faculty of Education. So supervision was added to my undergraduate teaching duties. Exhilarated I welcomed the supervision of Mr. N's dissertation to my workload. I felt "grown up," a proper academic, judged mature enough to be entrusted with the responsibility of a postgraduate student. At last I could also talk airily at tea break to my peers about "my" student.

That morning I dragged my chair so I could sit alongside the two men in front of my desk on which a blank notepad and pencil lay ready. Mr. N. was an educational planner in a government department and had the air of a man in authority. He was decisive about his topic, which was directly related to his professional responsibilities. I carefully took him through the structure of the proposed first chapter. I scribbled, scribbled, scribbled while I talked. Words, arrows, circles outlined the familiar composition of the first chapter. Mr. N. gathered the discarded pages. "Oh, don't, don't!" I exclaimed when I watched scraps carefully stowed in his briefcase, "I'm just thinking out loud." Professor O. looked on without comment. Then he leaned back and tilted his chair a little, stretched out his long legs, and hooked a shapely hand into his trouser pocket. I recognized his body language. Throughout the writing of my own master's dissertation and doctoral thesis, I had been a conscientious disciple of Professor O's exposition of the meta-narrative of scientific writing: precise problem formulation, research questions which cohered elegantly with aims, and a précis of the research design. His insistence on form and structure has influenced me to this day.

> Oh, and would you please submit your typed work, chapter by chapter. Double spaced so I have room to add my comments. Just one chapter at a time. Only when we are both quite satisfied, should you go on. But, of course, that doesn't stop you from reading ahead. Just keep reading and reading! That's what Professor O. taught me!

Was that patronizing? Heavy-handed? Mr. N. was at least ten years older than me; I was acutely aware of my inexperience, gender, class. Professor O. added, "And I also look forward to reading your work, Mr. N. Such a relevant topic you have chosen. I won't join your meetings, but I am always available—just across the corridor." Then he nodded at me, "Mr. N., you've got yourself a good supervisor." I was abashed but grateful, too, especially since I was untested. Mr. N. was reserved, cordial, and unassuming. I seemed to have struck the right note after all. Professor O's approval took me back to my introduction to the Department Chair two years earlier, when I had first joined the university, with only a half-finished master's dissertation. The Chair had gestured towards Professor O. with same emphatic comment, "You've got yourself a good supervisor." Not to be a good supervisor in my Department was shocking. I was thoroughly aware of the oral tradition of the "bad" supervisor—careless, indifferent, a slacker who kept students waiting for feedback for months. I had heard rumors of dissatisfied students who had gone to as far as to insist that the Dean appoint another advisor. Quality service to students was normative in my university. Dominant organizational traditions, values, and practices regarding the accountability of university teachers to their student charges reinforced my inner generative desire to care deeply for my own students (McAdams and Logan 2004). After Mr. N. graduated, Professor O. discontinued his advisory role. By then I was already working with several other students, solo and eager to share my new methodological interests. Generativity was thus modeled by my supervisor and fostered by cultural demand within the institution (Karpiak 2000); I now added my own oil to the flame.

Vignette 3: Transmission of a Personal Aesthetic

Generative desire, located in a grand question or defining experience and fuelled by cultural demand, is animated by personal aesthetic, that is, the idealized image of something that the generative adult longs to experience, to make, and to transmit to others (McAdams and Logan 2004). In the late 1980s, positivism reigned in the Faculty of Education, where I worked. My doctoral study was marked by my opportune encounter with qualitative methodology, and I had been coached at a distance by the likes of Bogdan and Biklen (1982), Lofland and Lofland (1984), and Wolcott (1973). My supervisor, Professor O., had remained aloof from my breakthrough, but my enthusiasm easily won him over and he gave me free rein in my inquiry. My discovery of qualitative methodology both satisfied the tenets of my epistemology and shaped a vision of how research should be done, which resisted the prevailing institutional research ethos. Consequently, the transmission of this methodology became a focus of my generative action and an integral part of the aesthetic I wished to leave to my students.

> – Let me tell you all about qualitative research! This is research in the natural setting—observing in the school, the home, the workplace—and it involves gathering data directly from people by interviewing them, not using a questionnaire or some standardized test. You, yourself, are the data gathering instrument, and it means inquiring after people's experiences, how they feel and see things—from their own point of view. Kind of like stepping into their shoes and surveying the world that way. I believe you are real-

ly well-suited to this kind of research, [I explained to a student].

– Really? I think I would love that. I enjoy talking to people. It's been part of my job for years, and I am curious about how people feel and think and why they make the choices they make.

– Great. Then I shall suggest a reading list for you. You will have to read on two fronts at the same time: on your topic and on the methodology. I recommend you start with Bogdan and Biklen's book. I just love that book! [I continued].

This exchange typically opened the discussion of research methodology with the new postgraduate student who followed in quick succession after my first meeting with Mr. N. Students who were geographically distant were initiated by letter. I urged students to skill themselves by loaning my own thesis or other theses using qualitative methods from the library by mail order. I was in love—with a method; I was a zealous missionary and converts were easy to find. My second graduate was the first of many. Julia was a warm, good-natured woman in her early thirties who worked abroad for a Christian youth organization based in Britain. She strode into my office during a sabbatical in her home country and we instantly connected. Her interest lay in the experiences of high school students, parents, and teachers in Poland during the late-80s, a country she visited frequently for her work. She had a plausible proficiency in Polish and several professional contacts who could act as gatekeepers. She was my first student to produce an ethnographic case study—although we were both too methodologically naïve to call it that—using multiple data gathering during a period of extended fieldwork. The result was a de-

scription of a community in socio-political and educational transition—wistful in its descriptions of people caught up in dramatic change, sensitive to the hopeful yearnings of parents and adolescents, and rich in its intellectual discussions with a host of eminent expert informants (Bekker 1993).

My supervision of my keenest students who were engaged in a variety of qualitative designs was a source of vicarious delight—I did not have "time out" to immerse myself in lengthy fieldwork, but my students could. I was unable to experiment with novel data gathering techniques, but able and well-positioned students could. Around their efforts, my own projects, and my growing research expertise, I fashioned a personal aesthetic, a partly intuitive idea of what I and my ablest students should seek in research—"beauty, as well as truth, demanding that solutions be elegant and that the character of creative scientific work be also largely artistic" (Kay 1996:111). Thus, Glynis produced a full-blown ethnography of a home school—now couched in the correct terminology—and thereafter a performative inquiry in which her participants "danced the data" in a dramatic production (Moore 2002; 2009); Tshilidzi spent months shadowing the "woman in the principal's office" in a deep rural school, using her *emic* knowledge of language and culture to explore communication patterns in school management (Thakhathi 2001); Marwan interviewed and observed Catholic school principals in his native Lebanon (Tabet 1998); Meryl travelled to Australia to compare classroom practice of outcomes-based education to the faltering new curriculum reform efforts back home (Williamson 2000); a rabbi was participant observer in an Orthodox *yeshiva*, and

suggested pedagogical change that would not violate millennia of traditional pedagogy (Kraines 2006); Zengele produced a grounded theory. "But what if I collect all my data and I then don't discover a theory?," he worried as we poured over his notes spread over my dining room table. "Oh, of course, you will!" I declared impatiently, and so he developed his theory of teacher migration (Weda 2012). In these and other students' efforts, I was increasingly satisfied by a scholarly ideal of "well-formedness" (McAdams and Logan 2004:106), which inspired my subsequent student-supervisor relationships.

Vignette 4: Separation-Individuation of the Protégé

Generative care for a mentee who is less skilled and less knowledgeable is focused on empowerment and the avoidance of unhealthy dependence on the mentor. The mentor motivated by generativity does not seek to merely "drop" something into the life of his/her protégé; ultimately, the protégé should determine the meanings that his/her work will contain (Kotre and Kotre 1998). I found this true of postgraduate supervision, and it was Leone who taught me this lesson. She was a "second generation" student, a descriptor I had coined for those students who had completed a Master's degree under my supervision and returned, sometimes immediately, sometimes years later, to enroll for the doctorate. Supervision of "second generation" students was particularly rewarding due to their discernible development, which I could easily track as they progressed from one degree to the next. I was introduced to Leone shortly before I was capped; I was still plain Mrs. X. She was a charming, attractive woman in her early 50s, a music teacher and

a bright student who took her late-career studies seriously. She had been enquiring about a suitable supervisor for a Master's for some time and had eventually settled with a colleague far more experienced than me. After he unexpectedly resigned from the university, he referred Leone to me. Initially, she was unsure of herself and of my competence, and required constant reassurance. She read voraciously, but was nervous to write. When she began writing, she never knew when to stop. The same applied to her data gathering; she kept adding interview participants long after data saturation. She photocopied every article that interested her and when we chatted on the phone, she was always engaged in "filing or piling," as she described it. She called me at work; she called me at home. She got to distinguish my "busy" voice from my "friendly" one; I came to expect her daily messages left with the departmental secretary, my husband, or my daughters. Eventually, I invited her to dinner, and she became a regular weekend guest. My girls, who had joked about the constant phone calls, now lingered on the line to chat with her. She undertook a study trip to the United States, and returned with more information which demanded selective sifting, a shiny, red porcelain apple from New York for my desk, and mementos for my daughters. She graduated with her masters *cum laude*, and my husband and I celebrated her success in her new townhouse, where she had moved after a painful divorce. The university awarded her a merit grant for a doctorate, and once again we resumed discussions in my cramped office on campus. She matured into a decisive and confident student with strong ideas about what she wanted to do: a narrative inquiry of the career and personal development of successful professionals (de Villiers 2001). She still struggled with copious reading, but

now she knew how to extract the essence from the literature. She had mastered qualitative methodology; as an interviewer, she was empathetic and sensitive. She could draw people out and prompt them to articulate hidden feelings. She crafted twelve lively life story narratives. I was touched by the characters she described and intrigued by their career trajectories. She selected just the right extracts from lengthy transcripts to illustrate turning points in her participants' lives. Nonetheless, as a set, the narratives lacked coherence; they stood dislocated from one another.

– More wine, Leone? May give you inspiration! [My husband quipped and refilled her glass as Leone joined us at dinner one Friday evening].

– Thank you, and the lasagna is as delicious as always, [she answered].

– But now back to your findings, [I reminded her, ever task-orientated]. Your narratives stirred me, but taken as a whole, they lack unity. You must do something creative to weave your key findings together. I am so tired of mere descriptive categories in qualitative research reports!

– I agree, but how, can I be creative?

– You're a music teacher [piped up my youngest daughter] and a performer. Music's your life. Use something musical.

The next day Leone called.

I have it—the sonata form. Music's time proven point of departure for structuring creative expression: Exposition, Development, and Recapitulation. I shall synthesize the key findings in that form with relevant subdivisions. It'll be a perfect frame of reference for drawing key conclusions about the lives of my gifted participants.

I gulped. Would that work? Wasn't that taking creativity too far? What about the examination panel? Then I shot back, "Go for it!" After all, it was her thesis, her work, her baby, not mine. My supervision did not make sense if it did not lead a student to attain autonomy. Generative care required me to allow separation-individuation of my students, letting them go on "to interpret and use their products in unanticipated ways" (de St. Aubin 2013:243). It was my turn to step aside, move back, liberate my student from vestiges of my "control." Subsequently, Leone wrote a novel synthesis of research findings, clustered around the sonata form, and her stories came together in metaphorical harmony. Later, a member of the examination panel breached academic etiquette by surreptitiously calling me at home to tell me, "Now that's how a thesis should be done."

Vignette 5: Threats to Generativity and Redemption

In the face of the vicissitudes of life, the generative adult cannot sidestep generativity-threatening experiences, such as the death of a child or the symbolic "death" of a generative project. These realities have to be faced and the experience reworked into the life story if generative commitment is to survive (de St. Aubin 1998). McAdams (2006) argues that the redemption of failure and the embracing of a "second chance" are typical of highly generative adults. In this regard, it was particularly humbling to experience my steadfast belief in and commitment to supervision as generative act was threatened, not by another's failure but my own professional botch.

When I am anxious, I dream: of losing important documents, forgetting appointments, arriving late for a departure, dreams of missing the mark, stumbling at the bar. When I awake, I gratefully reassure myself that I am safe, secure, untouched by disaster. But, by late middle age, I had experienced my share of catastrophic dreams that did not melt in the early morning light. A nightmare, which morphed into a shameful reality, was sparked by these words on the examination report of Mr. Brown's doctoral thesis: "I have examined the abovementioned candidate's thesis and my recommendation is that it be referred back to the candidate for revision and resubmission for examination." Mr. Brown was an overseas student whose postgraduate supervision had been conducted solely by correspondence—initially, by written correspondence mailed between continents, and later by e-mail correspondence. This tuition mode is not unusual at my distance education institution, and at least a third of the large numbers of postgraduate students complete their degrees successfully without a face-to-face encounter with a supervisor. Mr. Brown intended to visit my country to receive his degree in person. The news of rejected thesis turned a celebratory visit into a remedial exercise. I met Mr. Brown and his daughter who accompanied him in the foyer of their hotel. Mr. Brown graciously accepted my repeated apologies: at supper at my favorite Greek restaurant, at a dinner in his honor at my home, during sightseeing trips around the city. Together we designed a second qualitative research phase comprising interviews to enrich his survey findings, which had been judged too thin by the examiner. Father and daughter left on their transatlantic flight home without reproaching me. I worked throughout the holidays on Mr. Brown's revised draft of his thesis. I worked on Christmas Day. I polished the text where it was uneven. I eased in the rich data where participant quo-

tations seemed to jar. The two phases of the newly introduced mixed-method design cohered seamlessly. I could not find a misplaced sentence to betray the anguish we had both felt—student and supervisor. The re-examination went off without a hitch and the degree certificate was duly dispatched to the new graduate. I kept the shame of this "stillbirth" to myself, as I suspected, most of my fellow supervisors did. Supervision in my institution is largely carried out in a private space, where the inclusion or exclusion of related events to the collegiate is self-monitored. I only admitted to success; failure was furtively hidden. A confidante pointed out that I had not been at my academic best since my husband's death three months prior to the first submission of Mr. Brown's thesis. "Surely a trauma as powerful as that is sufficient to serve as an explanation for your misjudgment?," she suggested. But, I did not allow that kind of rationalization. I rejected her justification roughly, even rudely. My erroneous evaluation that a piece of work had met the standards and could proceed safely to examination warranted no excuse.

As I recalled this "memory with a sting" (Denzin 2013:123), Mr. Brown's thesis lay next to my computer, elegantly bound in green with gold lettering. I thumbed through it again and again, willing myself to find some flaw that would betray its unfortunate history. But, there was no trace of weakness in methodology or findings, not even a typo. In fact, I have since frequently referred subsequent students to the work as an apt example of mixed-method design. But, this did not mean that I could alter my story, or Mr. Brown's, for that matter. He never got to cross the stage in the grand auditorium as he had hoped, with the special applause given to an international student

ringing in his ears. That was ruled out by the expense of a second trip from his home country to mine. I did not ever know how he had handled the embarrassment of delayed examination results at his workplace, what explanation he had given to his friends or neighbors. I could only imagine it. All I knew is that I was accountable for his disappointment, his humiliation. As a supervisor, I had failed. With the "death" of this project, my commitment to generative care foundered. I recalled Professor O's words like a judgment: "Remember your name is on the thesis, too. The student passes, you pass. The student fails, you have failed." I found myself in the place of the penitent practitioner who must face the facts of his/her shame and guilt in the light of professional error (MacFarlane and Gourlay 2009). In the aftermath of this bungled affair, I sought self-repair in a renewal of my commitment to the rest of my postgraduate students. Their enthusiastic e-mails, phone calls, personal visits and the constant stream of their chapters, which arrived on my desk for my comment, limited time for brooding. The generative cycle would have been broken irretrievably if this failure was not integrated into my overarching theme of purpose and self-worth (MacFarlane and Gourlay 2009). Redeeming my future as a supervisor depended on my "fear, guilt, shame, or despair … giving way to the experience of happiness, joy, excitement, growth" (McAdams 2006:88), which accompanied the guidance of new students.

Vignette 6: Perpetuating the Generative Cycle

As a cyclical process, generativity is sustained by inspiring and recruiting the next generation to partici-

pate in the ongoing cycle of worthwhile generative endeavor (de St. Aubin 1998). As my career moves to its end, the desire to engender and witness a generative commitment in my students becomes more urgent.

At 8h00 on a Wednesday morning in January 2014, Marietta arrived promptly for her weekly consultation on thesis writing. We settled ourselves in front of my computer in my untidy study in my home office. My two dogs ceased sniffing the visitor and settled themselves at our feet. Marietta hooked her brown satchel over her chair and tipped a pile of books onto the cluttered desk. A book with a royal blue spine caught my eye.

– Oh, I see you've come across Howard Gardner, [I remarked]. He's renowned for his work on creativity, which is your thesis topic. I'd forgotten all about him.
– Gardner's a great find. Guess how I discovered his work? By reading Leone's thesis which you lent me, even though her research dates back to the mid-90s. Of course, she used his earlier works. And I got so many amazing ideas for my research design during my coffee date with another of your old students, Glynis. Thanks for that introduction, too, [Marietta responded].
– I was certain Glynis would be helpful. Did I ever tell you how her research design evolved? [I asked]. I went to a conference in Lisbon and heard this fantastic presentation on performative inquiry, and when I returned, I suggested that Glynis use it in her study. I knew she was a drama teacher and writing an ethnodrama with her multiracial drama students seemed a perfect method for her to work with.
– Right! But, that is how research seems to work. One person passing on what they are passionate about to the next. It is like a chain that links one researcher to the

next. I feel like your former students have passed the baton on to me, and now I must run my race with it. Hopefully, I can also pass it on to another student some day! [Exclaimed Marietta].
– You've distilled my academic credo in a nutshell. But, believe me, not every academic shares expertise so generously. I know plenty of people who play their cards close to their chest. I've just read a recent article by Pratt [2013] who stresses that not everyone is generative. But, they miss a lot! One of the most authoritative voices on generativity, Ed de St. Aubin [2013], writes that academic meaning-making lies in our sharing and passing on our know-how to the new cohort of scholars. This connects us to something bigger than ourselves, and that what gives scholarship meaning, [I concluded].

Marietta sighed, contented with the thought. I, too, was satisfied with our consensus.

As I confront mandatory retirement from academic life within a short time, I realize a generative "mission" as encapsulated in my supervision has expanded once again to include the transmission of an ideal of how a scholar should fit into the larger social context of academe. The prolongation of generative action in academe is only ensured when generative scholars successfully recruit their students to engage in similar service through both example and passion (Neumann 2006).

Conclusion

Faust (2003) says,

We create ourselves out of the stories we tell about our lives, stories that impose purpose and meaning

on experiences that often seem random and discontinuous. As we scrutinize our own past in the effort to explain ourselves to ourselves we discover—or invent—consistent motivations, characteristic patterns, fundamental values, a sense of self. Fashioned out of memories, our stories become our identities. (p. 1)

So what has my story interpreted through the lens of generativity taught me about my supervisor identity (Driscoll 2000)? Through autoethnography, I have been enabled to direct the inward gaze to act as a "visionary accomplice capable of self-seeing" (Massumi 2002:32), doubling back in deep self-reflection to examine how I as an individual have interacted with my students; how I have responded, or reacted to, and at times resisted, this particular university environment where I have supervised graduates, located not only in southern Africa but also in the United Kingdom, Canada, the United States, and Australia. I have discovered, together with Ellis (2011), my approach to academe is less about career, but more about vocation. "You mustn't get so involved with your students," a former colleague rebuked me recently. I ignored the well-intentioned remark because I could not reconcile myself with her advice. My ongoing gratification lies in the transformation I see, not so much in society, but in my students. "You know, Professor, why I want to do this Doctorate?," Caro asked me during a discussion on her new research proposal, "Because the Masters didn't answer my questions! I am not talking about the research question. It did that, sure, but not the questions I have now!" I have been rewarded by another un-curious student who has become inquiring. The ideals I wish to achieve with supervision resonate with my own values-based generativity project,

which has become more pronounced in its intensity and deliberate in its goals in late career. If generativity is driven by a desire to outwit mortality by "conserving, renovating, or creating of a meaning system: the 'mind' of culture" (Kotre and Kotre 1998:379), my intentionality in supervision thinly disguises the aspiration to leave some legacy, which will outlive my academic "death" soon to be concretized in mandatory retirement. However, I acknowledge that an autoethnography cannot remain only an exercise in enlarged self-knowledge. As Humphreys (2005:851) asks, "Has my autobiographical narrative … focused your gaze in the same direction?" Through personal and intimate storying, my other intention is to cast the outward gaze on university life, which is so often dominated by meta-analysis (Trahar 2011). In sum, my university presents many opportunities for generative action, but these opportunities can also

be resisted and ignored. The onus of generativity lies squarely on the individual scholar who must be motivated by inner desire before he or she can be incentivized by institutional rewards or coerced by cultural norms. Finally, by using my own story, I have endeavored to disrupt the boundaries of the research meta-narrative (Ruiz-Junco and Vidal-Ortiz 2011) in a way that extends even the concept of the qualitative in research. The self-reflection contained in these vignettes is not aimed at indulgent narcissism, but rather as an invitation to the reader to develop professional wisdom as we learn to know ourselves and seek to improve our practice as supervisors and mentors (Mann, Gordon, and McLeod 2009). Inner reflection, particularly reflection on the "intricacies of emotion" (Ellis 2009:105), should deepen, not diminish, our knowledge of the world "out there."

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Expanding Our Methodological Toolbox: The "Place" of Twitter in the Ethnographic Endeavor

Abstract   Social media have been increasingly embraced by social actors inhabiting a wide range of social worlds, including the world of professional sports. This paper argues that Twitter has become an indispensible resource for sociologists seeking to better understand these worlds. Using data collected for a study of the Canadian Football League (CFL), the paper contrasts traditional interviews and Twitter as sources of data. This is followed by a discussion of both the unique advantages and limitations of Twitter data in research. The paper ends by encouraging an expansion of sociology's methodological toolbox to include this form of social media.

Keywords   Social Media; Twitter; Methodological Toolbox; Sources of Data; Canadian Football League

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With the rise of the Internet, more people are using new communication technologies such as email, short message service (SMS), social media sites, and social networking sites. Much of everyday life is taking place on the Internet, and the distinction between online and offline reality is becoming less useful. As a consequence, a noticeable number of researchers in the field suggest we need to turn our attention to how these two spaces (online-offline) interact with and transform each other (Haythornthwaite and Kazmer 2002; Salaff 2002; Bakardjieva 2005; Beneito-Montagut 2011). Specifically, as people incorporate more computer-mediated communication into their daily lives (Mann and Stewart 2000; Whitty 2002; 2003; 2004; Clegg Smith 2004), the use of these technologies has become a taken-for-granted aspect of social life (Bruce and Hogan 1998; Star 1999). Recognition of this fact means ethnographers must also begin to identify how our research subjects use online communications, and expand our methodological toolbox to fully capture the social world we are studying.

Among the most popular of the new technologies is Twitter. Twitter is a social media website that gives users the ability to share their thoughts and opinions with others, and in turn read and comment on others' thoughts. Twitter is considered a micro-blogging service, which allows users to post and read 140 character "tweets." It is considered a hybrid of social interactions and media (Altheide and Schneider 2013). Social media disseminate information like radio or TV, where users can find links to newspaper articles, videos, blogs, and so forth. Twitter is designed to facilitate social interaction, the sharing of digital media, and collaboration, as well as having aspects of social network technologies (Facebook, LinkedIn), where users connect with each other by sharing ideas, pictures, et cetera (Murthy 2012). Both the popularity and accessibility of Twitter as a personal news media tool used by members of the community-at-large makes it a force to be considered by ethnographers interested in the social organization of everyday life.

This paper describes how Twitter became an important "place" within which to gain intimate familiarity with a particular social world, that is, the world of professional sports. Specifically, I draw upon data gathered through my research study on the lived experiences of players and their families as part of the Canadian Football League (CFL). As part of that project, I struggled to find places where I could "hang out" and observe professional football players and their families in a natural setting. I constantly felt like an outsider—I was a woman in a male-dominated field, I was not an athlete, nor was I part of any media organization. When I attended alumni events and professional team events (e.g., training camp), I felt uncomfortable and worried that people were suspicious of me. While these factors did not prevent me from attending as many events as possible and conducting face-to-face interviews, I began to note Twitter served as an invaluable resource for gathering fieldwork data. To my surprise, Twitter became a "place" where I would log on every day and view newspaper articles, player tweets, blogs posted, and videos related to professional football.

What made this kind of access to professional football possible is the degree to which members of the professional sport world have adopted social media. Athletes, coaches, and reporters are using Twitter to connect directly with fans and each other instead of having their messages filtered through the public relations departments of sports organizations and mainstream media outlets (Hambrick et al. 2010). Twitter can offer fans unprecedented access to professional athletes and their personal and social lives (Hambrick et al. 2010). Athletes can develop their own Twitter pages and use them to discuss their playing performances and interact with teammates and fans.

Similar to the representation of other professional sports on Twitter, the CFL has many players, coaches, and team personnel using this social media to connect with fans, reporters, and others. CFL players using this social media range from rookies to all-star veterans. CFL teams use Twitter to communicate team information, events, and charity opportunities. The CFL organization also has representation on Twitter. For example, people can follow the CFL commissioner, the CFL media personnel, and

the Canadian Football League Players' Association (CFLPA).

In a similar fashion, sport reporting has become prominent on Twitter. In terms of the media covering the CFL, you can follow the CFL panel on TSN, as well as the beat reporters of each team. Each media organization has at least one Twitter account that keeps its followers up-to-date with the latest news around the league.

Being able to compare both traditional interviews and Twitter-generated material gave me the opportunity to appreciate both the benefits and the limitations of Twitter as a source of data for scholarly research. Those issues are outlined in the following sections. I begin with a discussion of how sociologists tend to treat online material as data with a specific focus on social media (Twitter). Second, I address the benefit of using social media, Twitter, in an ethnographic study. Throughout this section, I draw on the field notes I created to understand tweets, articles, blog posts, and videos that athletes, coaches, and reporters post. Third, I address some of the limitations of using Twitter as a methodological tool. Finally, I conclude by addressing the larger methodological debates around online research, and argue that Twitter provides a unique "place" to do field research and, as such, needs to be included as part of the methodological toolbox used by ethnographers.

Online Methods: Using Social Media as Data

The use of Internet-generated qualitative data has typically fallen under the umbrella of an online ethnography or "virtual ethnography" (Hine 2008). Some researchers studying online settings argue "virtual" sites of research differ greatly from traditional "real world" settings (Hine 2000; Lysloff 2003). These researchers rely solely on data collected online—blogs, chat rooms, forums—where the researcher could not be physically present (Beneito-Montagut 2011). These virtual sites usually come from listserv, where *all* interaction between group members occurs online (Garcia et al. 2009). For example, Walstrom's (2000) study of eating disorders and LeBesco's (2004) study of the experience of being overweight are both based on support communities that exist only virtually. Ethnographers who adopt this perspective argue social life of online support communities can be examined without considering the "offline" world.

On the other hand, other sociologists have argued that the social world contains both traditional and technologically advanced modes of communication and social activity (Lyman and Wakeford 1999; Ruhleder 2000; Garcia et al. 2009; Beneito-Montagut 2011). To quote Garcia and colleagues (2009),

> "Virtual Reality" is not a reality separate from other aspects of human action and experience, but rather a part of it. Therefore, ethnographers should define the field or setting of their research on the basis of their research topic. (p. 54)

The boundaries between online and offline communication are increasingly becoming blurred regarding the message, the situation, and the interaction (Haythornthwaite and Kazmer 2002; Salaff 2002; Carter 2004). Beneito-Montagut (2011) proposes a methodological position of an "expanded ethnography" to capture individuals' use of online interaction in a holistic manner. By adopting the "expanded ethnography" approach, researchers are encouraged to consider both "online" and "offline" human action and experience as data.

Notably, sociologists who approach their studies from a symbolic interactionist perspective and favor traditional ethnographic research have always been open to the use of whatever material sheds light on human group life (Glaser and Strauss 1967; Spector 1980). This approach requires what Cooley (1909) has called sympathetic introspection. Ethnographers aim to gain intimate familiarity with social actors in the empirical world by immersing themselves in their research participants' social world (Blumer 1969), with the objective of achieving an intersubjective understanding of the viewpoints and experiences of the other (Prus 2005). To achieve this understanding, researchers place emphasis on the ways that people actually engage in the activities that constitute human group life (Prus 2005). This requires researchers to do everything possible to get to that life and know what is going on in it (Blumer 1969). Thus, using social media, such as Twitter, gives researchers another avenue into the social world under investigation.

Further, ethnographic research has always consisted of not only observations, participant observations, and in-depth interviews but also the examination of a broad range of documents that, in one way or another, capture people's lives. Among these documents are journalistic accounts, autobiographies, diaries, and personal letters (Her-

man-Kinney and Verschaeve 2003). As Glaser and Strauss (1967) note,

> When someone stands in the library stacks, he is, metaphorically, surrounded by voices begging to be heard. Every book, every magazine article, represents at least one person who is equivalent to the anthropologist's informant or the sociologist's interviewee. In those publications, people converse, announce positions, argue with a range of eloquence, and describe events or scenes in ways entirely comparable to what is seen and heard during fieldwork. The researcher needs only to discover the voices in the library to release them for his analytic use. (p. 163)

Although a new form of communication, Twitter resounds with such voices. Every tweet, posting, and blog represents a person who has an opinion/idea that he/she wants to be heard and conveyed to others. Thus, like a sociologist's interviewees, these voices can be tapped for the insights they offer into the perspectives and experiences of social actors.

In recognition of the potential richness of such data, Altheide and Schneider (2013) offer a way to study online communication technologies, called "ethnographic content analysis" (ECA). Derived from the theoretical and methodological position of symbolic interactionism and traditional ethnographic research, ECA supports traditional ethnographic research by placing importance on understanding the social meaning of actors, including, but not exclusive to, social contexts, situations, experiences, emotions, identities, and relationships. Conducting ECA, researchers are encouraged to focus on the emergent themes and categories expressed through media forms such as Twitter.

ECA treats online content (e.g., postings, tweets, newspaper articles) as documents. Documents are defined as any symbolic representation that can be recorded or retrieved for analysis—documents are studied to understand culture by examining "the process and the array of objects, symbols, and meanings that make up the social reality shared by members of a society" (Altheide and Schneider 2013:5). Altheide and Schneider's (2013:20) position on documents enables researchers to "(a) place symbolic meaning in context; (b) track the process of its creation and influence on social definitions; (c) let our understanding emerge through detailed investigation." The aim of ECA is to be systematic and analytic, but not rigid, so one can focus on themes and categories as they emerge rather than predetermining them. ECA uses *constant discovery* and *constant comparison* of relevant situations, settings, styles, images, meanings, and nuances (Glaser and Strauss 1967; Berg 1989; Altheide and Schneider 2013).

Benefits of Twitter in the Research Process

Turning now to my own experience using social media, my study of the CFL involved collecting data in a number of ways. Besides collecting "online" documents (Twitter), I engaged in participant observations and conducted traditional face-to-face interviews. I took the triangulation approach advised by Denzin (1978), who insists that researchers use multiple methods with a variety of data as a means of increasing the depth of theoretical understanding of the material evoked in their research project. My inclusion of Twitter as part of my methodological

toolkit allowed me to glean insight into the social world I would otherwise not have gained.

Twitter is very public and instantaneous, making it easy to access a variety of people and topics. I started by following 150 members of the CFL. I would read through tweets daily, recording themes and ideas that would emerge. The sheer volume of daily tweets made it difficult to be comprehensive. For that reason, I began using the "favorite" function, which identified lines of exchanges that appeared to be particularly interesting or significant. I then copied these tweets, pasted them into a PDF document, and labeled them according to the date of posting. I used a PDF format because the data could be easily searched using keywords, people, events, and hashtags.[1] This made it possible to create a new PDF file for every searched item. Further, saving data in a PDF file allowed me to interact with the document, that is, the online sites remained active and could be easily accessed by clicking the link as it was provided in the tweets (Altheide and Schneider 2013). Using PDF documents allowed me to easily organize, search, and access online documents.

After a year of following over 150 Twitter accounts that were tied to the CFL (players, coaches, reporters, spouses, etc.), reading countless newspaper articles, watching online interviews and blogs, and reading Twitter discussions, I finally started to get a sense of the daily activities of athletes, the issues they were discussing, their viewpoints on a range

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[1] A hashtag (#) is a function of Twitter that allows users to describe and search the subject of a tweet rather than specific content (Ovadia 2009). Users use hashtags to "mark tweets topically so that others can follow the conversations centering on a particular topic" (Boyd, Golder, and Lotan 2010:1).

of issues, and the situations that preoccupied them and their families. There is no way to know with certainty whether the athletes themselves are sending the tweets—sometimes family members will tweet on their behalf. But, tweets sent out in the athletes' names come to represent them, and are viewed by the community that reads them as reflections of who they are and what they think. Similarly, I have taken a similar stance in collecting my data. Specifically, I accept Twitter postings as a public representation of that athlete's account. Twitter provides access to conversations between players, coaches, reporters, and fans. In this way, by using Twitter, I was able to grasp the symbolic meanings that the athletes themselves defined as important and real—their "definition of situations" and "construction of reality" (Thomas and Thomas 1928; Berger and Luckmann 1966).

To organize this data, I created a set of field notes that I divided into four categories: (1) emerging themes; (2) relationships among professional athletes; (3) debates, issues, and controversies around professional sports; and (4) future interview questions. In what follows, I explain how I used these four categories to understand the meanings, experiences, emotions, situations, and relationships expressed by participants. In this way, Twitter became the "place" to collect data and enter the social world.

Emerging Themes

The first type of field notes I started to write concerned the emerging themes and categories I identified in hashtags and tweets. There are many hashtags used specifically referencing the CFL

(e.g., #CFL, #TiCats, #Riders, #Als). But, after reading tweets and following players, other hashtags emerged. I found a wide range of hashtags used by players addressing a variety of topics.

A few hashtags that were common for players to use were: #grind, #camplife, #blessed, and #inspired. The hashtag #blessed is used commonly by professional football players. For example, one player tweeted: "7th professional football training camp in the books! #Blessed to still be living a dream! #NFL #CFL #Alouettes #Healthy #ComebackSeason" (June 18, 2013). Many players used the hashtag #blessed to give thanks for their opportunity or that God has blessed them with a gift to play football. Hashtags have helped me search words athletes are using to describe their daily activities, their viewpoints, and the ways they support their team. Additionally, as the example above revealed, I became more aware of, and sensitive to, how they perceived self as a football player in terms of "living a dream" and having support of unknown, superpowers such as God.

Hashtags can be beneficial to the research project, especially large generic hashtags like #CFL. By using hashtags, researchers can follow general trends of tweets about the social world under investigation, but also see the different discussions happening around events, people, or even the meanings people attach to hashtags.

However, not all tweets contain hashtags, thus it became important to not only rely on hashtags, but to continually click the "favorite" function to keep track of tweets people were posting. For example,

some of the early emerging themes included retirement, religion, honoring players, injuries, signing, trading, contracts, and life as an athlete. I gathered tweets that discussed career contingencies participants faced. The theme of career contingency included players, coaches, reporters, and others tweeting about players being released, traded, resigned, and other contract related issues. Thus, when a team traded one of its long-time players, a teammate tweeted, "It's gonna be different looking across the locker and not seeing @geroysimon this is the bad part of the business. The best WR I have seen" (January 24, 2013). Another player tweeted, "I love this game &owe it so much but hearing @ronflemons 1of my best friends &teammates ever get cut? ... I dunno man, no loyalty #argos #cfl" (January 24, 2013).

Data such as these verified my understanding of the meaning trades hold for those not traded. Football players face many career contingencies, and being cut or released is not only hard on the player but also on teammates. After collecting more tweets about other activities affecting their careers, the ways players experienced or gave meaning to these career uncertainties started to emerge. I could see that such uncertainties not only affected the player going through them but also other individuals, especially other players, who were affected by their teammate's release or trade. Themes started to connect to other themes, such as family life, emotions, and teammates. And field notes would connect to each other as I started to map out the main contours of this particular social world.

Researchers who are interested in studying a group, a social world, or a subculture may find social me-

dia such as Twitter to be a valuable research tool for gaining intimate familiarity. There are many social worlds that have adopted Twitter as an online form of communication, such as the entertainment industry, religious organizations, political organizations, social movement groups. Researchers can use Twitter to collect data on the different meanings, experiences, emotions, and situations of members of the social world under investigation. Twitter can also help the researcher collect data on significant events, for example, an election, the world cup, natural disasters, and international conflicts. What makes Twitter a valuable research tool for ethnographers is that it makes geographical boundaries irrelevant and allows researchers to gain insight into the lives of those who may not be in close proximity.

Relationships Among Professional Football Players

Another advantage of using Twitter to study social life is that it gives researchers the ability to track users' public conversations. Individuals who read the tweet then have the option to either retweet, that is, pass the tweet on to their followers, or to reply to the tweet. When I would pull up the original or first tweet, all the reply tweets would appear below. These additional data were particularly useful because I found smaller, peripheral conversations occurring between football players, coaches, reporters, and fans. This gave me access to the relationships between them.

Many players have different relationships with other players, coaches, and reporters. They would tweet each other frequently, talk about a friendship with an old teammate, and some players would attach

a photo of teammates hanging out or doing something. For example, one player tweeted, "Team comradery (sic) at its finest @calstampeders @park_a86 @steviebaggsjr #team #BBQ http://instagr.am/p/R0jG3pNVU4/" (November 09, 2013), and attached a picture of himself and his teammates at a barbeque. Other players would tweet personal messages to or about fellow players. For example, one participant sent a congratulatory tweet to newly retired player: "The Sultan is heading down to Toronto today to support his good friend @BIGMURPH56 in his retirement from a great career!! #cfl #CFLPA" (May 24, 2012). Players also tweet each other to wish each other luck on upcoming games: "Well wishes to all my old teammates playing in the big game today. Remp, Keep, JJ, JY, Pre. Bring it home fellas" (November 25, 2012).

Besides tracking relationships among teammates, public conversations also allowed me to consider relationships that players have with each in and around the league, and even with fans. Twitter conversations included followers wishing players luck on their upcoming game, players encouraging each other for the next game, or discussing more generic issues related to the sport. This information enabled me to map out the different relationships and associations that members of the CFL have with each other and the community-at-large.

For ethnographers interested in using Twitter to study a particular social world, they may find it beneficial to track the different conversations people have on the social media website because it can highlight the different relationships people have, who is communicating with each other (despite geo-

graphical boundaries), and help draw out different members of that particular group, subculture, or social world. By focusing on the relationships, researchers can map out and study the different forms of association and relationship in that particular social world.

Debates, Issues, and Controversies in Professional Sports

For those interested in studying a group, subculture, or social worlds, Twitter is useful in following the day-to-day issues that preoccupy the inhabitant of that social world. Many social problems come to be debated and defined within and between social worlds. Twitter offers the researcher an opportunity to examine how social problems become defined, the meanings people attach to that problem, and can illuminate the different claims and counter-claims being expressed by individuals and groups (Loseke 2003; Spector and Kitsuse 2006).

For example, in reading tweets daily, I noticed that the National Football League (NFL) and the CFL were connected by their common interest in certain debates, issues, or controversies in professional football. In these field notes, I would write down the problem under consideration and the different claim-makers and claims being made about that particular issue (Loseke 2003; Spector and Kitsuse 2006). For example, one issue that has affected professional sports in general is concussions, a particularly "hot topic" in professional hockey and football. Tweets enabled me to collect materials related to concussions, especially tweets with attached articles on concussions from the NFL and the CFL.

Both the NFL and CFL have become increasingly concerned with head injuries and the consequences of these injuries later in life. The following sample of tweets is provided to illustrate the range of topics tweeted in relation to head injuries. Some tweets are of a personal nature, reporting on specific players suffering from concussions. Other users have used Twitter to tweet about the latest research on concussion, newspaper articles, and court cases.

> **Drew Edwards** I've talked to former #Ticats living w/ effects of multiple head injuries. It's not pretty. #CFL doing some but needs to do more. We all do. (October 04, 2012)

> **Retired NFL Players** NFL's concussion crisis and head injuries may be way worse than first thought http://wtsp.com http://on.wtsp.com/SFStnH via @WTSP10News (November 04, 2012)

> **Off The Record** 3 starting QBs went down with concussions on Sunday. Is this an issue that's flown under the radar? #ConcussionTalk (November 13, 2012)

> **NFLPA** Former Players Receive New Neuro-Cognitive Benefit. #NFLPA release here: http://bit.ly/THl-Wui (December 07, 2012)

> **Retired NFL Players** Concussion Liability Costs May Rise, and Not Just for N.F.L. http://nyti.ms/UxQbFj (December 10, 2012)

By following exchanges around particular issues such as this one, I was able to see how different social worlds and subcultures were connected to each other. I could see professional sports and the differ-

ent leagues dealing with head traumas were all connected by this larger social problem. Here, I started to get a sense of the issues players were facing and how the CFL was connected to the larger professional sport leagues like the NFL.

Future Interview Questions

The fourth type of field notes involved specific questions I could ask in future interviews. For example, one player tweeted while out due to injury, "Great lift and pool workout in today. #thankful4anotherchance #nodaysoff #road2recovery" (January 22, 2013) to keep his followers up-to-date with his recovery. Another example of an injury related tweet occurred when a player tweeted, "The days of being able to touch my face with my right hand are officially gone. Way too much calcium blockage in right elbow" (January 24, 2013). Collecting tweets about injuries prompted me to seek out information on additional injuries experienced by players, how they recovered, and the different meanings football players attached to different types of injuries.

Some interview questions were specific to an interview participant. Many of my participants are public figures and, as Spector (1980) argues, when conducting research on public figures, it pays to do one's homework and to present oneself as having some background or knowledge about the subject for discussion. This is particularly important to my research because football players are public figures and information about their careers is thus publicly available. A quick Google search allows you to learn everything about a player's career. Twitter can offer useful insight into a participant's life and his

immediate concerns, information that can be used to great effect in an interview. Players using Twitter tweet about their everyday lives, schedules, training rituals, families, and opinions. Thus, before conducting an interview, I would search Twitter to see if my participants used the social media platform. If they did, I would go through their tweets to try to personalize the questions even more—with specific focus on their everyday life, things they might take for granted, or issues that might be uppermost on their mind.

As more people start to integrate social media and Twitter into their everyday lives, there is less of a distinction between "online" and "offline," providing the researcher an opportunity to research participants prior to the interview process. Researchers can use participants' Twitter pages and tweets to personalize their interview guides, create new questions, and gather information that would not have been known prior to interview. For this reason, Twitter provides an opportunity to inform interview questions and, at times, use their tweets as probes to encourage conversation and elicit detailed descriptions.

Limitations of Twitter

While there are numerous benefits to using Twitter, there are also limitations. During the time I was coding tweets and forming interview questions, I was conducting interviews with players and their spouses. I decided to ask questions about social media, specifically Twitter. I asked questions about using Twitter, what they would tweet, if they were afraid to use Twitter, if there were limitations on

what the player and spouse could tweet, and general questions about how social media have changed professional sports. In asking these questions, three limitations of Twitter-generated data emerged: (1) Tweets only provide a piece of the story; (2) there are (un)written rules to using Twitter; and (3) the status hierarchy in professional sports affects one's freedom to tweet.

When tweets are compared with interview data, I realized Twitter provided limited information, whereas the interview data offered me a richer description of the experiences of professional players' lives and families. For example, one player tweeted about his first year of retirement: "Last night was a huge test for me ... After watching ... I miss the game terribly ... But not a fraction of how I missed my kids when I played" (June 30, 2012) and "What a difference a yr makes. Last yr was eating glass and pacing night before game ... This yr I'm putting together Razor scooters 4 kids" (June 29, 2012).

Those tweets represented some of the emotions of disinvolving from professional football and the different adjustments one makes in this social process. However, in comparison to my interview data, tweets merely scratch the surface. The following interview quotes demonstrate how much more detail I gained concerning player retirement:

> My life was not the same for about four years at least. Every May, June, I would be getting ready to play football. It was something lost in my life. I played thirteen years. I had a routine of doing stuff. So that was hard. I got into doing a radio show for the [media outlet], I was quite involved, then I went into scouting

for [a CFL team]. I was involved, but my life pattern was different, and it took a couple years to get out of that pattern of ... I got to get ready for training camp, I got to get ready for this, it is a game day ... it was just a mental set and thinking I've done something wrong. I wake up in the middle of the night thinking I got to get ready for the game, that sort of thing. (Jerry)

It's usually the hardest time for a player, I believe because the one thing you really miss is the camaraderie of your teammates. And when you retire, I still had a lot of teammates on that team that I played with and went to wars with and played a lot good football games with, and you miss that camaraderie. The game, I would say that I did miss some of the game because that's what I've been doing since I was six as a kid, and now you just like stop ... is emotionally hard. And I'm an emotional player, and at the same time it is something part of me, my DNA. It runs through me. (Roger)

A second limitation concerns the written and unwritten rules involved in using social media. Specifically, spouses of players would explain the potential dangers in tweeting something about football. Many of these women were privy to information that was not public knowledge, and they discussed how they were limited in what they could post online and what the player could post. Thus, a researcher should never rely only on Twitter because he/she is highly unlikely to obtain a complete picture of the social world he/she is studying. The following are interview quotes regarding the (un)written rules to using social media:

Now Joey always has to make sure that I don't say anything on Facebook that could be controversial.

Let's say we are watching a football game and someone throws a pick, I can't be like, fuck this guy sucks. Obviously, I know I can't say that. We are sort, there is no freedom of speech in that sense because someone ... people can tweet something like that, but I wouldn't and he won't. (Michelle)

I don't post things about Shawn's injury or about the team. I don't post that on any social media like Facebook or Twitter. You have to be very careful what information you say. When you are married to someone, they tell you a lot of things about the team, and that's not public knowledge. Those were some of the challenges that I learned to deal with that is maybe a little different than college. (Katie)

Oh yeah, I know that a couple of his teammates have done that before. Some of them were released I think. I think one of them took a picture of someone that was injured and then the other team finds out someone is injured, and I've heard of people being release for tweets, for sure. I think in training camp two years ago, and he wrote an apology or whatever, and I know that some of them have bashed certain cities or bashed French people in Montreal, and I know they have done that over Twitter before and I think they can get fined for it. I think the CFL has fined guys for that before. (Sara)

In addition to rules, I also realized that there was a status hierarchy among players in professional football, and that some players could post more freely than others. Many participants talked about how certain players were able to say more than others given their position on the field, years in the league, and performance. For example, veterans and retired

players might be able to tweet a negative opinion against something that would question the status quo in football where a younger, new player would not. For example, a recently retired player tweeted the following messages against the General Manager and coach of a particular team:

Really Ed Hervey? Calling out players personally as a GM? When a team is 1-8 + you point the finger. 4 should be pointed right back 'atcha! ... The locker room I know for a fact would be livid ... Good luck having the players play for "you" for the rest of the year. You have lost them ... The honorable thing Kavis Reed should do today is call a presser ... And shit can himself. (September 04, 2013)

It is far less likely that a rookie or someone new to the league would make controversial comments like the ones above. The social world of the CFL can and does place many limitations of what a player and his family can say publicly about his team. Many football families explained they would not post anything they thought could threaten players' careers, or the team, or in the league. Although Twitter only provides part(s) of the story, it is, nonetheless, a unique place to collect data and enrich the interview process.

Conclusion

This paper has illustrated the advantages of incorporating Twitter into our methodological toolbox. I demonstrated how Twitter provides many different sources of data including, but not exclusively, tweets, newspaper articles, blog posts, and pictures. Using Twitter-generated data, I divided field notes into four

categories: (1) emerging themes; (2) relationships among professional athletes; (3) debates, issues, or controversies around professional sports; and (4) future interview questions. Tweets enabled me to better appreciate the meanings, experiences, emotions, situations, and relationships expressed by people involved in the CFL. Twitter became an invaluable resource for collecting secondary data on the participant before the interview process. I could draw on the interviewee's tweets to inform interview questions and, at times, use their tweets as probes to encourage conversation and elicit detailed descriptions.

When conducting traditional interviews, I was able to ask participants about their Twitter use and about Twitter use in professional sports, more generally. By incorporating interview data on Twitter use, I also discovered there are certain limitations to using Twitter-generated data—the unwritten rules players and their spouses followed and that, in some cases, CFL teams placed restrictions on what players could tweet. In this process, I realized that the status hierarchy in the CFL was mimicked on Twitter, giving some players and coaches more freedom to tweet their personal opinions on CFL matters than others. As such, researchers should be aware of any limitations and/or restrictions placed on members of a social world that limit what people can post on Twitter.

By examining the uses of Twitter-generated data into my methodological toolbox and comparing it with traditional interview data, I would agree with Murthy's (2012) statement,

In the case of Twitter, it may be intensifying pre-existing characteristics of an erosion of the private in

which more quotidian aspects of our lives are publicly shared. We learn about other people's daily rituals, habits, happenings, and the places they visit. (p. 106)

In the case study of the CFL, the boundaries between online and offline are blurry and unclear. I found some players tweeted about their private lives by sharing their daily activities, photos of their families, and expressing their opinions. Twitter use among professional athletes should not be considered a "virtual" world but rather it is incorporating advanced modes of technology into their daily lives. Twitter's prevalence in the social world of the CFL not only made advantageous to the research process but necessary. In some cases, Twitter use among players, coaches, and reporters has faded in the background of taken-for-granted aspects of everyday life. Even if members of the CFL do not use Twitter, they are affected by it because every team is represented on it and each team has a policy on the team's use of Twitter.

In sum, this research contributes to our understanding of professional sports use of social media and

how Twitter can be advantageous to the research process. Further, ethnographers who are interested in studying a particular group, subculture, or social world can use social media to enrich their research projects. It provides the researcher with an avenue to collect data, record emerging themes, highlight relationships and forms of associations, draw attention to social problems, controversies, and debates, and help inform interview questions. Twitter provides another method for researcher's to immerse himself/herself into the world of their research subject and gain intimate familiarity. Future studies need to address the ways social media can benefit data collection, but also if or how Twitter has been adopted by the social world under investigation.

Acknowledgements

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A Qualitative Analysis of the Lived Experiences of a Small Group of Filipino Immigrants

Abstract   Demographers have forecasted that the U.S. is rapidly moving closer to becoming a majority-minority country, this fact and the politically divisive nature of recent debates and attempts at immigration reform have fostered increased conversations about citizenship, diversity, assimilation/s, and other im/migration discourses. Often these dialogues surround boarder-crossings and the political, economic, and social implications of im/migration. One unfortunate outcome is frequently the perpetuation of stereotypes and the "othering" of many migrant groups to which this research offers a counter narrative. This counter narrative is built on the lived citizenship of a small group of Filipino im/migrants in the U.S. The paper demonstrates that—contextually—working abroad is common practice in the Philippines; this phenomenon is woven into the political, social, and economic jurisdictions of the country. This research fills one gap in im/migration studies as it chronicles the stories of these Filipino im/migrants while examining their perceptions about their identity, sense of belonging, right to place, and the legitimacy of their citizenship socio-culturally. The paper places these and other narratives from this group of im/migrants within the theoretical framework of Critical Theory, hence offering a voice to a group of individuals not frequently heard in academia.

Keywords   Lived Experiences; Citizenship/s; Belonging; Im/migration; Filipino Immigrants

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Globalization has rendered geo-political borders fluid and penetrable. International migration for the purposes of economic opportunity and talent transfer is not new and has been cited as a major propellant for global expansionism ranging from imperialism to neo-colonialism and neoliberalism (Pottie-Sherman 2013). In today's world, the prevalence of cross-border movements largely facilitated by home governmental policies aimed at supporting a less *transient home* population has given rise to notions of talent mobility (Pricewaterhouse-Coopers 2011). Nowhere is this phenomenon more common than among Asian countries, which have seen the mass movement of skilled workers, entrepreneurs, and professionals among nations (Chang 2006; Xiang 2006).

This article is a synthetic piece drawing broadly upon Critical Theory (CT) as an epistemological framework for discussing the lived citizenship experiences of a small group of Filipino immigrants in the U.S. Subsumed within the broad process of im/migration are the critical discourses of global, transnational, and flexible citizenships, identity/s, assimilation, belonging, rights to place, and real, as well as perceived, power relations. Hence, CT allows for the framing of this piece around themes related to obligatory-cultural-citizenship/s independent of legal political citizenship. This paper argues that the quest for economic prosperity, followed by some form of citizenship that draws many Filipino im/migrants from the global-south (in reference to poor/third world/underdeveloped/less developed countries) to the global-north (in reference to first world/more developed/developed countries), has given rise to an economic and political system of

dependency in the Philippines. This dependency is the result of mainly voluntary flows of money and goods from im/migrant workers, also known as *balikbayans* and overseas Filipino workers (OFW), to their home-country. Prior to the passing of Republic Act 8424, also known as the Tax Reform Act of 1997, that granted tax exempt status to OFW (Republic of the Philippines Professional Regulation Commission 2014), many im/migrants were of the perception that, in exchange for the taxes they pay the government on their overseas earnings, they would gain access to physical mobility between the Philippines and the country within which they live and work. Critical Theory (Littlejohn 1992; Seiler 2013) thus offers a framework for explaining these im/migrants' sense of cultural-group-identity that keeps them grounded to their desired Filipino citizenship/heritage/traditions/culture. This paper presents nuanced perspectives, which demonstrate that the talent transfer process in this country has given rise to other forms of citizenship outside of legal status tied to Asian Americans histories (Ching Jen 2011).

For the purposes of this paper, hybridity and flexible citizenship refer to the im/migrants' simultaneous nationalist commitments/obligations, alongside their economic motivations for im/migration, assimilation/s, and capital circulation (human-economic, social, and cultural) (Bourdieu and Wacquant 1992). These factors are used to underpin the three-fold argument of this paper. The first that the Philippines has a specific socio-political context that allows for the export of educated and skilled labor, which has given rise to the *balikbayan* society. The formal and informal support for talent transfer in the Philippines forms the fundamental economic and socio-cultural

core, which is ideologically and normatively placed within neo-coloniality, dependency, and neoliberalism. The second argument—many Filipino immigrants who arrive in the U.S. do so under a quasi-points-based system enacted through liberalist U.S. government policies around im/migration, the Hart-Celler reforms, which allowed for increases in H, J, and family reunification visa categories. Some of these visa categories give im/migrants the option to become permanent residents and to become U.S. citizens within 3-5 years after permanent residence is obtained. The third argument—and the core of this paper—is that as im/migrants attempt to settle and assimilate, their lived-citizenships evolve into a hybridity that makes their citizenship not only global and transnational but also flexible, as they assume and re/produce hegemonic-type identities and practices that are based on power relations that disadvantage racialized minorities. As a result, they struggle with systemic institutions and agents that label/perceive/treat them like most other identifiable im/migrants as forever foreigners and prompt questions about the legitimacy of their citizenship and sense of belonging.

As the piece presents discussion on this third argument, it does not "naively celebrate migration, remittances, and transnational engagement as self-help development 'from below'" (de Hass 2008:2). While acknowledging the importance of these phenomena, this piece attempts to theoretically correspond with the views of de Hass (2008), which note that the transnationality of many international migrants is, in fact, rooted in structural constraints and the role played by many States, which results in the reciprocity of social, economic, political, and developmen-

tal depravation in some global south countries that propel migrants out while simultaneously accepting the return flows from the out-bound migrants that lift living standards and economic well-being in the migrants' home country/ies. Hence, while CT allows this paper to present an optimistic view of transnationality of the small sample of migrants it focuses on, the piece is also situated within the broader discourse surrounding dependency and State-centrist and neoliberal perspectives and influences. This piece uses as a fundamental theoretical underpinning the neo-classical equilibrium perspective, as purported by Ravenstein (see: de Hass [2008]), which states that migration and development are inseparable, and most migration is, for economic reasons, often connected to the supply of and demand for labor. Extending from this neo-classical perspective, it is assumed that the out-bound migrant is a rational being who chooses his/her migration destination based on the availability and potential for maximum economic outcome. Critical Theory allows this research to take this neo-classical perspective on migration and add an individualistic-storied perspective on how these migration decisions are made, the outcomes in terms of expectations, and actual experiences of the migrants by presenting critical micro-level voices, while giving a nod to the importance of the historical-structural theory through discussions about the role of dependency in the migration moves under study.

Filipino Context

Background on Migration

Many economically advanced societies, including Canada, Denmark, and Australia, have a supply

driven immigration policy under the PBS (Pottie-Sherman 2013). In the Philippines, however, talent export is both supply- and demand-driven. Supply-driven because of an excess of educated and skilled labor coupled with a globally non-competitive labor market and salaries/wages. On the demand-side, overseas employers seek employees with English proficiency and skills training crafted to suit their needs (Hassan and Talib 2013; Horverak et al. 2013; Pottie-Sherman 2013). An estimated 10.5 million of the Philippines 96 million people work and live abroad (Commission on Filipinos Overseas 2012). According to the U.S. Bureau of the Census,[1] Filipinos constitute the third largest im/migrant group following Mexicans and Chinese. The Commission on Filipinos Overseas (2012) confirms that approximately 3.5 million documented Filipino im/migrants live and work in the United States. The paucity of information about Filipino immigrants in the U.S. has fueled the notion of "forgotten Asian Americans" by writers such as Cordova (1983), Cimmrarusti (1996), and David and Okazaki (2006) because little is known about their im/migrant experiences.

Balikbayan and overseas Filipino workers (OFWs) are two terms used to broadly categorize Filipinos living and working outside the Philippines. According to Rafael (1997), the term *balikbayan* describes Filipino emigrants who have permanent resident status or citizenship with prospective economic contributions to the national economy. They historically held white-collar jobs. On the other hand, OFWs are often temporarily contracted workers, who travel

overseas on work visas that do not offer any citizenship options. These OFWs are frequently called the nation's "new heroes" because of the financial contributions they make to the country (San Juan 2006).

The most notable influx of Filipino im/migrant to the U.S. occurred after World War II—in response to migration policy, as well as labor shortages overseas. In 1965, the U.S. replaced the 1924 National Origins Act with the Hart-Celler Act. This 1965 immigration act facilitated admittance of Latin American, Caribbean, and Asian im/migrants/nationals under a visa system (Tullao 2006). Wiley (2012) notes that the neoliberal immigration policy shift of 1965, emphasizing family reunification, lead to exponential growth of Filipino immigrants in the U.S. while simultaneously eroding that country's human capital.

Filipino Government and Institutional Policies on Talent Transfer

The political rhetoric of the Filipino government with regard to its labor force is that human capital is an exportable commodity. The Philippine Overseas Employment Administration ([POEA] 2011) cooperates with local and international recruitment agencies and potential employers to process and facilitate job placement for about 44,624 OFWs and *balikbayans* daily (Wiley 2012:22). Wiley (2012) notes that the POEA handles prospective OFWs in two ways. First, it facilitates private employment through "tripartism" via local agencies and prospective overseas employers. Second, it facilitates public sector employment in health and other services directly with foreign governments. Statistics from POEA (2011) indicate that OFWs and *balikbayans* prefer the

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[1] See: http://www.census.gov/. Retrieved September 01, 2015.

U.S. as their destination. Prospective OFWs and *balikbayans* are evaluated based on a quasi-PBS, focused on their education, language ability, age, occupation, and work experience.

Migrant Contributions to the Filipino Economy: *Balikbayan*/OFW Nation

Bangko Sentral ng Pilipinas (2013) notes that the contributions of cash remittances from Filipino im/migrants point to economics as a primary push factor in the large sustained numbers of *balikbayans* and OFWs. Thus, this country's im/migration policy enacted through POEA is a nation-building strategy (Pottie-Sherman 2013). There is also a heavily contested view that this talent transfer policy is steeped in neoliberal ideals and dependency. According to Cassidy (2004), remittances to this country typically support the daily housing, education, and health needs of those dependent on *balikbayans* and OFWs. Such remittances, according to San Juan (2006), arrive through both formal and informal channels, and in 2010, they contributed USD 8 billion or 9.4% of the Philippines' GDP (Bayangos 2012). According to Bayangos (2012), the country's 2010 remittance contributions to GDP represented a 4.2% growth over that of 2009. Bangko Sentral ng Pilipinas (2013) adds that in 2013, remittances amounted to USD 20.8 billion or 10% of the Philippines' GDP. It was further noted that of the 2013 remittances, 42% came from *balikbayans* and OFWs in the U.S. These figures are contextualized by the USD 41 billion dollars that exit the U.S. annually in the form of remittances (Goldberg 2008). Remittances have become an important cash flow to the Philippine populace and government and are critical for the survival of many families (Tullao 2006; Lopez 2013; Teves 2014).

Theoretical Framework

Critical Theory

Critical Theory (CT) is rooted in critiques of social constructions. It expands Marxist criticism of capitalist, eco-political systems by proposing strategies for social emancipation through conscious, self-reflective understanding of society and criticizing notions of ideology. Therefore, according to Littlejohn (1992), it determines an individual's consciousness while simultaneously creating their subjective understanding of lived experiences, which allows their understandings to transcend the ideological and normative. In this research, the superstructure includes the economic system and neoliberal policies that dictate the immigration and visa processes, as well as the educational, media, and religious systems the Philippines inherited during and after colonial-type occupations.

A nuanced view of the narratives of Filipino im/migration shows that the superstructure uses various forms and modes of communication to normalize the dominant socio-cultural and socio-political ideologies that are then lived through individual citizenship experiences. As the dimensions of the superstructure tug internally and externally to maintain dominance in society, Littlejohn (1992) notes that it provides a conceptual framework for making sense of our lived, material conditions, while its inherent ideology re/produces our culture, as well as our consciousness of who we are. "Critical Theory moves precisely in between the contingency of objectified non-critical factual reality and the normativity of utopian idealizations, that

is, within the so-called 'theory/practice' problem" (Ingram 1990:xxiii). Key to CT is the unmasking of past injustices rooted in socio-political power relations. It argues that individuals should be capable of achieving cooperative forms of self-actualization only if freed from coercive mechanisms of domination.

Critical Theory recognizes the importance of the lived experiences of individuals, thus providing an interpretive dimension that focuses on societal oppression through the lens of societal symbols and acts. It also provides an explanatory framework for how many im/migrants re/create their identities within their home country—preparing them for the possibility of moving to the global-north for employment, within their im/migrant, socio-political settings and within the context of the voluntary and obligatory transnationalism. Penelope (1990) and Seiler (2013) suggest that segregated groups should assume the power to name their own experiences in ways that reflect their meanings, and this is achievable by positioning their experiences outside the dominant discourse, which is historically masculine and in need of change. This research is attempting to allow a small group of im/migrants to narrate their citizenships, guided by CT.

Dependency and Neo-Coloniality

Dependency theory put forward by theorists such as Rodney (1981) provides the explanatory framework for the rampant underdevelopment seen in several countries in the global-south. According to this theory, development in post-colonial societies is dependent on the economic and physical infra-

structure, as well as the socio-political systems established during colonization. This, they assert, is reflected in international trade patterns. Hence, the contemporary growth and development experienced by many global-south countries are fragile because these are suffused in capitalist power relations and neo-coloniality. Such relations are fueled by local demand and consumption practices, but controlled by hegemonic structures in the global-north (Wallerstein 2004).

Dependency theory suggests that the economic, political, and social fragility of the development of post-colonial societies cannot be overcome without the poor countries extricating themselves from the global economic system that re/produces their dependency. In the context of this piece, which examines the experiences of individuals from one global-south country that has systematized talent transfer, questions about who reaps the ultimate benefits from such economic practices prevail. Dependency theory, in concert with Wallerstein's (2004) World Systems Theory, offers a conceptual framework for the emergence of such narratives. Within this piece, Dependency and World Systems Theories are closely tied to global neoliberalism/neo-coloniality. Neoliberal policies of liberalization, privatization, open-markets, and open-competition serve to reinforce patterns of economic, political, and social exploitation globally (Klak and Myres 1997; Onyeiwu 2006; Timms 2006; Walsh 2006). These have confirmed World Systems' categorization of the world into core, semi-periphery, and periphery States, based on patterns of consumption, production, economic achievements, and poverty. Within the context of dependency,

World Systems Theory, and neoliberalism/neo-coloniality, commodification of all factors of production, including labor, leads to the sustained dependence of many global-south/periphery States. This paper asserts that it is the re/production of this dependency in the Philippines, coupled with local histories, geo-economic and socio-political conditionalities, that has resulted in this country's reliance on labor export/talent transfer as a means of supporting local economic needs.

Positioning the Theory in the Philippines

The presence of Filipinos in the U.S. is historically tied to the colonial occupation of the Philippines by Spain between 1565-1898 and the U.S. in 1898-1946 (Francia 2010). The colonial background of this country accounts for the predominance of Roman Catholicism, as well as the labor export industry that brought Filipinos to the U.S. via the slave trade (Cordova 1983; Espina 1988). Filipinos were the first Asia group to establish im/migrant settlements in the U.S. in 1763 (Espina 1988). The subsequent waves of Filipino immigrants to the U.S., however, were not results of slave trade, but resulted from the U.S. occupation (1898-1946) under the Treaty of Paris (Francia 2010). Scharlin (2000) notes that the Filipinos were admitted as U.S. nationals and seasonal farm workers (*sekadas*), as well as U.S. educated im/migrants (*pensionados*). During the post-WWII period, new and varied categories of im/migrants from the Philippines began entering the U.S., and by the 1960s, these groups were lead by workers in the health industry (Wiley 2012). For this latter group, training in health and educational system that reflects American val-

ues and ideals, coupled with English proficiency prior to relocation, gave them an advantage over other ethnic groups competing for the same jobs (Bautista 2002); the Philippines is plagued with a form of colonial mentality due to the archipelago's history of occupation that left it with colonial institutions and infrastructure. Such ideas have found a home in Rodney's (1981) and Wallerstein's (2004) Dependency and World Systems Theories respectively. This mentality reinforces the reliance on the global-north for employment/economic, social, and cultural support. David and Okazaki (2006) note that this prolonged "Americanization" led Filipinos to cultivate an attitude of self-hate (cultural apathy), seeing the U.S. as possessing a way of life that is superior (Rodney 1981; Banks and McGee Banks 2004; Wallerstein 2004; Horverak et al. 2013).

Methodology

Data Collection

Critical Discourse Analysis (CDA) is the methodological framework for studying the lived experiences of Filipino im/migrants in the U.S. Using a combination of self-selection convenience and snowball sampling, we contacted approximately 35 Filipino immigrants living in Chicago and the Detroit metro area. At the end of the data collection phase of this research, fifteen individuals had consented to be interviewed, with whom in-depth, individual, face-to-face interviews were conducted (see: Table 1). The participants were asked questions under the following themes: motivations to migrate, transnational networks, concept of home, and right

to place and movement (physical, economic, and social mobility [see: Appendix 1]). All questions were open-end, and participants were given the themes and asked to talk about their lived citizenship experiences pertaining to the themes. The themes are broadly situated within categories of capital circulation and are delineated as economic-human capital and socio-cultural capital. The data collection

process was guided by Fairclough's (1989; 1992) three-dimensional CDA model that examines the interrelationships and connectivity/s between social and political inequalities manifested through institutions, agents, cultural products, other social structures, discourses, and narratives. The interviews were transcribed and entered into NVivo for the purpose of data analysis.

Table 1. Study Participants.

	PSEUDONYM & AGE	OCCUPATION	CITY OF RESIDENCE/ EMPLOYMENT	REASONS FOR MIGRATION	LENGTH OF INTERVIEW
1	June, 28	Janitorial	Ann Arbor, MI	Family	2h 23 min
2	Carol, 32	Nurse	Ann Arbor, MI	Job *Recruited	2h 25 min
3	Casey, 34	Nurse	Ann Arbor, MI	Job *Recruited	2h 23 min
4	Joan, 34	Nurse	Ann Arbor, MI	Job *Recruited	1h 40 min
5	Andrea, 53	Store Clerk	Chicago, IL	Family	2h 10 min
6	Amalia, 52	Self-employed	Detroit, MI	Family	1h 10 min
7	Linda, 52	Lawyer	Lancing, MI	Family	2h 50 min
8	Mary, 36	Nurse	Saline, MI	Job *Recruited	2h 25 min
9	Alma, 51	Nurse	Saline, MI	Job *Recruited	1h 27 min
10	Grace, 42	Janitorial	Southfield, MI	Family	1h 20 min
11	Michelle, 45	Store Clerk	Southfield, MI	Job	1h 55 min
12	Cheryl, 53	Store Clerk	Southfield, MI	Family	1h 38 min
13	Ruby, 56	Unemployed	Southfield, MI	Family	2h 20 min
14	Pamela, 29	Nurse's Aide	Ypsilanti, MI	Job	2h 23 min
15	Arlene, 45	Self-employed	Ypsilanti, MI	Job	1h 42 min

Source: Self-elaboration.

Data Analysis: Critical Discourse Analysis

Critical Discourse Analysis (CDA) is a three-dimensional model that focuses on text, discursive practices, and social practices, and how these define individual and group descriptions, interpretations, and explanations about their experiences (Cui and Kelly 2013; Hassan and Talib 2013; Qiu 2013). In establishing a bridge between the Filipino immigrants' narratives and social practices, this piece uses the descriptions from Fairclough (1989) to examine the storied citizenship experiences of the Filipino immigrants, in terms of what Qiu (2013) perceives as their use of Systemic Functional Grammar (SFG) through linguistic devices and concepts. Here, we begin by identifying the components of this group's im/migrant/lived-citizenship featured most prominently in their conversations. In total, fifteen individuals were interviewed, this yielded eighty-four pages (11 point font, single spaced) of transcribed data that were rich in individual perspectives. All the interviews were analyzed to identify and report on the dominant themes, perspectives, and findings of this study. During the data coding and analysis process, the researchers realized that the narratives of the participants were consistent and showed very little variation from one participant to the next; therefore, the decision was made to focus the small stories used as exemplars in the piece to a limited number of participants. Given that the primary aim of this piece is the presentation of the participants' narratives, the researchers removed biases from the participant small stories chosen to be included as exemplars in this paper by taking a standardized approach, hence three interview transcriptions were selected using the length of the conversations (see: Table 1) (Silverman 2001) for this phase of the study.

The longest interview was Linda's. She is a 52-year-old attorney who was born in the U.S. to Filipino parents on H1B visas. When her parents' first H1B visas expired, they returned to the Philippines, where Linda lived with them from the age of 5 until the age of 15. The median interview is Andrea's. She is a 53-year-old former administrator in the Philippines, turned store clerk in the U.S. She was raised and educated to the Bachelor's degree level in the Philippines, and migrated in 2012 through the family reunification visa, when her husband filed for her and their children's permanent residency status. The shortest interview was with Amalia. She is a 52-year-old college graduate, living in the U.S. since 2000. Amalia worked in a government agency in the Philippines, and is currently a self-employed small business owner in the U.S.

All fifteen interview transcripts were stripped to represent only the responses the interviewees gave to the questions and themes presented to them. The next stage in the data analysis was to tally the number of times key words and phrases were used (Fairclough 1992) (see: Table 2), for the tallies for the three interviews used as exemplars in this piece. The words and phrases were derived from the dominant themes in the existing body of knowledge on im/migration and citizenship experiences, and related theories and questions pertaining to these were embedded in the interviews[2] (see: Appendix 1). For the second dimen-

sion of Fairclough's (1989; 1992) CDA model, the Filipino immigrants' discursive practices, in terms of theirs and the researchers' construction of "the relationship between the productive and interpretative discursive process" were established (Qiu 2013:1879). This was done using the narratives of these individuals, contextualized by how they internalize and reproduce (verbally and socially) hegemonic constructions around race and ethnicity, self-identifications/identities, and intra- extra-group social interactions. This required the extraction of small stories (Georgakopoulou 2006) and an examination of the main idea/s that were present and how these, within the context of the literature, offer an interpretation of the lived citizenship of this group of migrants.

The third and final dimension of Fairclough's model deals with social practices. Social practices, according to Qiu (2013) and Cui and Kelly (2013), are an explanatory configuration that allows one to examine the relationships between the discursive processes and the social processes as manifested through social practice. Here, we attempt to explain how the "discursive practices observed are a reflection of the participants' socio-cultural perspectives" (Qiu 2013:1881).

Methodological Limitations

The primary limitation faced in the collection of data for this study was identifying Filipino immigrants—mainly—in the Detroit metro area. The researchers contacted known Filipino immigrants in their personal and professional communities for recommendations about other individuals who might have been interested in participating in the study. This

process of snowball sampling yielded the names and contact information (telephone numbers and/or email addresses) for more than twenty persons who were initially contacted by the researchers. In addition, despite being contacted, no male Filipino immigrants consented to be interviewed, thus all the study participants are female.

A second limitation faced during the data collection process was positionality. Many of the individuals interviewed willingly volunteered information about their motivations for migrating, their professions, and educational and work experience in the Philippines, the recruitment process that brought them to the U.S., and their lived cultural identities and citizenship. However, they were less forthcoming with more personal information and perceptions about race, class, assimilation, and legal citizenship status. This limitation was more apparent when the non-Filipino researcher was the one conducting the interviews. This led the researchers to conclude that this researcher was perceived as an outsider, hence probing and redirecting was often used during these interviews to gain more nuanced responses.

The positionality limitation generated several interview answers/conversations that were vague, generic with sparse personal details. Hence, the positionality limitation influenced the researchers' decision to select exemplars based on the length of the interview to represent the narratives of the lived experiences/citizenship/s of the participants in the research finding and discussion sections, since there were no significant variations in the narratives of the individual participants.

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[2] Some of these words and phrases include: belong/ing-citizenship/s; home—America/the Philippines; migration policy/economic/visas; *other/ing* and race identification—white, people of color/blacks/brown; obligation/obligation to home/family; identity—I am; language—English/Tagalog/accent/s; cultural networks (Banks and McGee Banks 2004; Cui and Kelly 2013; Horverak et al. 2013; Qiu 2013).

Findings

Table 2: Count of Pros From Dominant Themes and Examples of Usage Context.

Words/Phrases	Linda 2h 50 min	Andrea 2h 10 min	Amalia 1h 10 min
Belong/ing	6	9	5
America/n in Reference to Citizenship/s	16	26	10
My identity—I am	57	30	4
I belong to the Philippines, but I belong to America, too, but most times I feel I am neither Filipino nor American. Deep inside we are still Filipinos. To me, it is only papers [legal-political citizenship] that changed, but we still speak the language [Tagalog] and our identities still revolve around our culture. (Amalia) I belong to neither. When I go to the Philippines, I can tell that I live in America because of my Tagalog, and here [in America] I feel like I belong to both sides because I am not white … in the real world, I am not white because people will ask me where am I from. My friends who are on a student visa or work visa we call ourselves legal alien because that is what is stamped in our passports, even though we view it as pre-citizenship, yes, at that time we are aspiring Americans. (Linda) For Andrea, 14 of the 30 times she used the term "I am" or referred to her identity it was a specific reference to citizenship status.			
Migration policy—Visas	21	2	0
There was a time when Filipinos were taxed whatever they earned here because they were still Filipino citizens, and that is what happened to my parents. They needed their American citizenship, or at least to become resident alien so that they could get out from under that because as a H1, you could go back to the Philippines, but you do not know if you could leave the country if you did not pay the taxes to the Filipino government. With the H1 visa, you were tax obligated to the Filipino government. (Linda)			
Philippines—As Home	52—32 (84)	21—6 (27)	11—11 (22)
I have a lot of art, and once a friend said, "You don't have any Filipino art here," so I went to my parents' house and I got a water buffalo wood carving … because I felt like I had to pay homage to my home, it indicates that I am Filipino because … (Linda) I do not want people to mistake that I am other things. (Andrea)			
Obligation/Send or Give Money/Help	38	13	7
My dad used to send a lot of money and give stuff away. He went home with boxes and boxes of stuff, too! This is the *posaloba* and the *balikbayan* culture, and even when he could not go home because he had overstayed his visa, he would send *balikbayan*-boxes [any cardboard container, for example, pampers boxes packed with stuff like Kellogg cereal and other food and personal items]. (Linda) Today, *balikbayan*-boxes are very good business, there are shipping company that provide you with containers that you pack with the stuff you are sending home, and they will collect these or you drop them off and they are shipped to the Philippines. (Amalia) Back home, they expect you to send them these things. They are looking for their little bounty! (Andrea)			
Other/ing—Race	4	6	1
White/Caucasian	17	0	0
Colored/Blacks/Brown	16	0	0
The ideal Filipino beauty will never be my skin color, they will be a little bit fairer, I am with affirmative action, but even then the graduation of your skin color, it is better to be brown than black, like café au lait, or dark chocolate, dark … back home, there are soaps and creams to keep your skin white or make it whiter. There, what is valued is the whiter your skin are, even though your features are mestizo. There, darker skin people (*Kayumanggi*) are considered lower class … beauty and complexion is also tied to your social class. (Linda) You shade yourself and you do not tan. When you go outside, you have our umbrella, or you do not go outside much. (Andrea)			
English/Tagalog/Accent/s	24/5/9	4/0/1	4/1/0
We look Asian so using the language is a way to signal to those around me that I am not Taiwanese or Chinese. (Andrea [and Linda]) If I am in public and I think someone is observing me or may want to start a conversation with me on account of an assumption they made about my heritage, where I am from, I will start talking to my daughter in Tagalog, even though I know she does not understand me [I married an American so my kids do not speak Tagalog, I did not teach her that language], but that gives me the opportunity to gauge their response to me. (Linda) If you have an accent, you are definitely at a disadvantage, even though if you are attuned, you can tell what someone is trying to say, but most people in the Midwest are not accent-sensitive so they will make negative comments. (Linda) American companies like us because we hardly ever have any accents [because of colonialism–education]. (Andrea [and Amalia])			
Cultural Networks	18	6	4
Interviewer: Did your family or a local Filipino community influenced where you chose to migrate to? Amalia: Ah, ok. His mom and sister live in Michigan. Practically, all his family members are in Michigan. I have a sister in Michigan, too. So, it was important that we stayed in Michigan. I really feel good and connected. Like I said, Filipinos are growing in number here and it is really a good thing for the sense of support that I, we feel from and for each other here**.**			

Source: Self-elaboration.

The Filipino immigrants' right to place begins with the visa process that takes them to America. Visa is the normative process of border enforcement by the U.S. For the im/migrant, it is tangible because without it they cannot enter the U.S., and it immediately signals how long they can stay, if they can work legally, and what category of aspiring American they fall into. Hence, the use of the term visa, or reference to it, is important in these conversations. Theorists on the notions of right to place focus on an individual's perceptive ownership and subsequent actions within a given place (Carmalt 2007). Within the context of this research, these immigrants' perceptive ownership begins within the neoliberal structures of border control, through the application, on to the issuance process of a visa (Ching Jen 2011).

One significant finding in this study is the notion that an individual—by adapting an identity assigned to them through a legal process—has made their visas tangible. Their visas then become a point of contestation—because it is a primary determinant of how much they identify with perceptive ownership as they move through the im/migration process (Ching Jen 2011). For example, the holder of a temporary visa (B1/2 or even J2), which does not allow the holder to work full time, own property, or even remain within the issuer's borders for more than a limited amount of time, is less likely to feel any obligations to the issuing country, even after remaining in this country for extended periods of time. Whereas a visa that signals a path to long-term stay or citizenship elicits more desires to invest in and become attached to the issuer's system (Giuliani 2003; Pottie-Sherman 2013). This was clearly evident from all the interviews conducted

with this group, and is simply stated in the quote that shows how individual immigrants identified themselves, or the number of times an immigrant felt the need to reaffirm his/her identity through statements such as the exemplars represented in Table 2. So, for them, place/space are ready constructs, both normatively and physically, and how much access they are allowed to have within and to this place prompts their attachments and space ownership (Carmalt 2007). This is notwithstanding the tensions exuded when individuals are unable to juxtapose their legal-political citizenship with their cultural citizenship and cultural adequacy because they are unable to view their membership within these categories as mutually exclusive (Ching Jen 2011).

With Filipino im/migrants, unlike with many other immigrants to the U.S. from the global-south, prior to the Philippines passing the Tax Reform Act of 1997, there were non-voluntary obligations to their country of origin. An example is presented in Table 2 under the migration policy—visa category. Here, the speakers talk about their mobility and how, in the past, this could have impeded their ability to return home and possibly travel out of the Philippines if they did not adhere to the legal obligations to pay taxes on their U.S. earnings, which they thought they were obligated to report to the Filipino government. This was a conditionality of the talent transfer facilitated by the government. In 2004, the Philippines Ministry of Finance attempted to repeal the tax-exempted status of the OFW, as an attempt to increase government revenue (Republic of the Philippines Professional Regulation Commission 2014), this measure failed.

Table 2 also provides examples typical of all the study participants when reference to the term "home country" is made. In this instance, it was represented as a place of obligation, somewhere they needed to travel to, give to, pay homage to, and a place that is attached to their identities. This finding contravenes traditional notions of home, which see it as a physical and social structure of convenience, and points to the socially constructed nature of these immigrants' identity, connectedness, and attachments (Owusu 1998; Giuliani 2003), as well as the neo-coloniality and social-geography that compel them to rearticulate the concept of home. This ties back to the colonial mentality (David and Okazaki 2006) and dependency (Rodney 1981; Wallerstein 2004) of this *balikbayan* society and how obligated these individuals feel, given the number of times these three interviewees used as exemplars stated that they felt obligated to the Philippines (see: Table 2).

One may argue that this colonial mentality and sense of identity carry over from their country specific socialization/social-geography (Owusu 1998). Note the number of times the three exemplars make reference to race, on the basis of racialized minorities in Table 2; this is typical of all the participants in this study. Here, the im/migrants carry with them cultural practices that are rooted in their country-specific colonial past. Many of these cultural practices surround race and color, and are also reinforced by the racialized nature of the U.S. (Lieberson 1963; Owusu 1998). Similar to other visible minorities who migrant to the U.S., the Filipinos in this study are more inclined to align themselves with whiteness (Ching Jen 2011).

Discussion

The Tensions of Citizenship: Small Story 1

My parents were recruited as healthcare professionals in the 1950s. They had a 5-year H1B visa … I was born here, and then, when I turned age 18 or 21, I filed the papers for them to become American citizens. My other 6 siblings who were not born in the U.S. had to come under their own visas. My two sisters and my youngest brother came under my parents'. Now, for me, using the word "home" in reference to the Philippines … It is my subconscious because I think I am more American than Filipino … I am divided, I am like a Caelian, and so it is situational. At one point, I did not feel I was American, and that is common to Filipinos who immigrated here as adults, like my parents. (Linda)

I still want to be a Filipino citizen, but our friends advise that my benefits will be limited if I stay a permanent resident. But, if there is a dual citizenship, I will go for it. My Filipino citizenship is now getting fuzzier. I feel like my being a Filipino is halved now that I am a permanent resident. (Andrea)

I feel like I am pulled in two directions. Deep in my heart I am still a Filipino. (Amalia)

When I become a U.S. citizen, I think I would feel like a full-fledged American and my being a Filipino would cease! I don't know really. It is confusing. Well, if I pledge to the flag of the U.S. during oath taking, isn't it a form of denouncing your being a Filipino? Your status as a Filipino diminishes since you will follow the rules and regulations in the U.S., but not all of us follow the rules. (Andrea)

Many Filipino im/migrants come here on visas, and when they go out of status, some of them go underground, but then they cannot get a job, they have to work under the table. For example, our housekeeper came from the Philippines. But, when my parents overstayed their visas, she becomes a deportable alien. She went underground, and then in 1980-something, Reagan did the amnesty, she met the requirements for citizenship. But, a lot of those who went underground had no documentation to show how long they had been here, and so they did not want to come forward. Our housekeeper, she ended up moving from place to place, so we did not know her address so we could not direct the FBI/INS to her when they came to our house to find her because they were going to deport her. But, she did not want to go home, her family there would be destitute because the money she was sending, they needed it. If the government deports her, she would not be able to come back. I do not even think she thought about citizenship, she just wanted to be able to send money home and she liked it here, she actually put a lot of her nieces through school while being illegal here in America [TNT or Tago Ng Tago]. I do not know of any undocumented Filipinos, there is an ocean between the Philippines and America, we cannot take a little boat to cross it, we all come here on papers, documents. (Linda)

"In the neoliberal knowledge economy, citizenship is an instrument of competitive advantage, with the targeting of talented migrants as paramount" (Brown and Tannock 2009 as cited in Pottie-Sherman 2013:558). A government uses its immigration policies to regulate more than just who is operating within which sets of circumstances or who is allowed to cross its geographic and political borders.

Using the criteria for admittance, stay, and exit, the immigration policies present newcomers with an ideological view of citizenry, setting the standards against which the im/migrant must/should be accepted as a citizen. As the im/migrants measure themselves against these idealized standards, they effectively become *othered* (Pottie-Sherman 2013). How an im/migrant measures up to the idea in this *othering* process later operates to legitimize or delegitimize their legal-political citizenship, as well as foreshadows their lived citizenship/s. Pottie-Sherman (2013:561) supports this point by noting that, "entry into the nation by no means guarantees full citizenship, and external exclusions often operate in tandem with internal ones."

Therefore, according to Smith (1997), national boundaries are socially constructed, except in the context of this research, where the social construction goes beyond the criterion for admittance and stay within a country. Small story 1, through recounting the specific narratives of the three interviewees included, represented the perspective of all study participants. They all freely talked about the visa process to enter the U.S. and their citizenship identities, but were more reluctant to talk about issues of undocumented Filipinos. As demonstrated by the speakers in small story 1, the longitudinal impact these admittance and stay criterion have in concert with existing value systems and cultural products moves the speakers' perceived citizenships outside the realm of political status to that of how they act-as-citizens/lived existence (Ching Jen 2011). Herbert (2009) added that this exclusionary approach to immigration is colonialist in nature because it assumes that the immigrant will be

temporary, taking more from the country than they are likely to contribute.

As small story 1 suggests, even when one measures up favorably against the ideal and meets the criteria for legal citizenship, there is still the reluctance to self-identify as American. This is even apparent in speaker (Linda) who was actually born in the U.S., but by virtue of the fact that she was raised by non-American parents and spent a long portion of her formative years in the Philippines, she sometimes struggles with citizenship belonging that is measured against a structural border enforcement policy. For Pottie-Sherman (2013:559), these critical narratives represent the juxtaposition of the "huddled masses" and the exclusionary policies aimed at keeping the "undesirables" out. The speakers in this small story are neither members of the huddles masses nor the undesirable, yet they are unable to see a distinction between their cultural citizenship and their legal status because their narratives are nuanced by the visa construct.

Sleeter and Delgado Bernal (2004) note that Critical Race Theory (CRT) examines and uses shared and individual experiences of race, class, gender, immigration status, language, and sexuality in education. As small story 1 evolved, CRT demonstrates the role of lived social indicators in the narrative rule breakers (aspiring Americans) in this Filipino im/migrants discourse. Here, an aspiring American is identified (Brazil—pseudonym), and an exploratory framework for her actions that qualifies her as an undesirable within U.S. immigration policy is immediately presented. In the process of portraying their narratives and actions, the speak-

er then justifies Brazil's role in the undesirable action (economic reasoning) and negates herself of wrongdoing ("did not know her address"), while simultaneously exonerating Brazil by pointing to the fact that she subsequently removed herself from the undesirable category by qualifying for legal citizenship. The speaker succinctly spoke and acted within the context of the dominant social structures, while giving a nod to her within-group dynamics, this was common among all the study participants. Hence, for Francia (2010), the characteristic/s that are ascribed the label of within-group cultural trait/s, connected to verbiage exemplars such as "no undocumented Filipinos," effectively removing their group from dominant negative rhetoric related to immigration in the U.S. today. In fact, the statement—*There are no, or I do not know of any undocumented Filipinos*—was a common rhetoric among the study participants.

Language, Social Identification, and Talent Transfer: Small Story 2

I had an interview and I was asked what weaknesses I had and if there is anything I would improve. I told the interviewers that I need to improve my English, my accent. The interviewers all told me that I should not worry because I can communicate in English. One of them asked why Filipinos could speak English. I said, because it is our medium of instruction in the Philippines. We use English in schools, businesses, and everything else alongside our own dialect. I made sure the interviewers understood that I want to improve my diction, intonation. What is the other term? Oh, pronunciation, too. The interviewers were all laughing. (Andrea)

I feel we have a better advantage over others because of our ability to speak and write in English. (Amalia)

When we first moved here, it was assimilate, assimilate … so we did not respect a lot of our culture. We did not speak Tagalog at home and so, eventually, we lost it. I speak English, but I did have an accent so some of my pronunciations were totally out so it was hard to understand me. Once I went to a store and I did not say hAngers … I said hOngers and she did not know what this thing is and I had the hardest time trying to get her to understand me. So, my goal became figuring out how to speak like an American. (Linda)

Siempre [of course], you have to adjust, I told my brother that he needs to send his children to take nursing or health related education and send them to America. (Andrea)

Many of us come because of the opportunities in America, part of it is economic, and another part of it is the language and culture because we feel more connected to the American culture. (Amalia)

If economic was the only factor, we could have gone to another Asian country. (Linda)

There is no problem with the language itself, the accent is there, but we blend well and our education system is similar to America's. Today, they are recruiting nurses CPAs, teachers, and cruise ship workers, as well. I was talking to one of my classmates, he is a doctor. He said his wife is going to nursing school because they are planning to apply to im/migrate. He knows he cannot get in as a doctor, but nurses are in high demand, so he is taking the nursing boards, as

well, with the hope that he will come here. So in the Philippines, you have the possibility of being exported elsewhere because of the education and the skills that you have. (Linda)

I also think some employers take advantage of Filipinos because they know they are relying on this visa. I have a friend who worked for company that does a lot of embroidery, she was sponsored because of her special skills, and sometimes she felt like her employer was holding it over her. Once you have your sponsor, there is nothing keeping you from going to some other company. Yes, you have a contract, but after that ends, they cannot make you stay, but sometimes you feel indebted, obligated because these people sponsored you. To ensure your loyalty to them, some employers, sponsors will try to keep your passport. This happens in many other countries, where we are working, too, and you may find that you cannot go home. (Linda)

And it does not even have to be an American who does this to you, it can be your own countrymen, the ones with the attitude that they paid their dues, so you have to, too. (Andrea)

My friend is not unique, I hear a lot of those stories from people I know. (Linda)

One would argue that the cultural apathy exhibited in the narratives above is a re/articulation of neo-colonial patterns of dominance and control that are embedded in long-standing feelings of inferiority of one's own cultural value (Banks and McGee Banks 2004). Counter arguments from Raza, Beaujot, and Woldemicael (2013) point to a correlation

between higher human capitals among im/migrants who speak English at home, suggesting that there is a synergy among economic, cultural, and social capital. Therefore, among all the participants in this study, it was apparent that their im/migrant goal-seeking behavior is paradoxically divisive as it separates them from their ethnic-culture, while concurrently increasing their potential human capital values. Added to this is the fact that higher status jobs often correlate with higher incomes, so within the *balikbayan*/OFW, categorizing two things are important—first, the dimension of one's aggregated ability to contribute financially to one's home country's economy, and second, one's visa status determines which of the groups you belong to. Berry (1980) and Raza, Beaujot, and Woldemicael (2013) reference this as a bidirectional individualist acculturation strategy that allows the im/migrants to engage in multiple approaches to cultural assimilation that facilitate their economic integration. This is tempered, however, by the fact that these writers have found strong correlations between visible minority statuses and earning disadvantages.

Combining the forgoing with the discourse on language assimilation strategies that emerged in small story 2 (that typifies all the participants in this study) and the notions of social capital as possessing a transferable value tied to resources, institutional, and social networks, as well as shared identities (Bourdieu and Wacquant 1992; Nakhaie and Kazemipur 2013) offers a useful micro-level explanatory framework. Nakhaie and Kazemipur's (2013:420) micro-level explanatory framework on social capital suggests that participation in a social

network that consists of both formal and informal groupings can positively impact "productivity, economic prosperity, job acquisition, social mobility, health, and happiness" among im/migrants, as it re/affirms their individual and group identities. One of the chief constraints on individual expression is language (Seiler 2013), so, for Ching Jen (2011:180), the assimilationist assumption that "acquisition of the dominant language customs and cultural values is the key process through which immigrants become Americans" is problematic. This is because English language use is a source of educational discrepancy among immigrants as it attempts to normalize American identity to the detriment of their transnational immigrant identity. All the study participants, like the exemplars in small story 2, normalize English as a part of their own identities, which is connected to their colonialist history, while at the same time, they attach real value to it, as it gives them the competitive edge in the global competition for talent. Therefore, the speakers effectively create their own critical narratives around English language use by mostly embracing its role in the dominant, not competing ideologies.

The above highlights the importance of education and specific training and skills in the migration of Filipinos; this was particularly true among the nurses who participated in the study. The health services, particularly nursing, were singled out because of the transferability of this qualification between some countries. Here, nurses who were interviewed were all recruited for their positions here in the U.S., and all their training, credentials, and licenses transferred, so they were not required to do any retraining once they arrived in the U.S.

The Situated Learning Theory posited by Jacobson (1996) (also see: Van Kleef and Werquin 2013) argues that influences of history, biology, and culture socially construct the process of learning thereby impacting cross-cultural transition and adaption. They note that a new culture takes an individual into unfamiliar meaning systems, so their ability to make meaningful decisions may be impaired. This is an important argument because, in the context of Critical Theory, the immigrant is able to transfer his/her skills and training to new socio-cultural settings more seamlessly. Correspondingly, the speakers in small story 2 suggest that despite the cultural differences, the educational context of training professionals in the Philippines is modeled off some aspects of the American educational system. Thus, this degree of similarity in educational context and the "deliberate, mindful abstraction of skill/knowledge" (Van Kleef and Werquin 2013:658), coupled with the im/migrants' willingness to immerse him/herself into the new socially constructed dynamic, allows the Filipino im/migrants a more seamless transition; this was the case among all the employed participants in this study, irrespective of their occupational category. The only obstacle becomes licensing in the U.S. It is at this juncture that the narratives of the im/migrants diverge from Jacobson (1996). All the study participants, like the speakers, note that as Filipinos, they are socialized to seek employment abroad. They also expect the socio-cultural settings to be different. As a result, they are more willing to re/negotiate their identities (professional/work and social) to fit the new settings. This, according to Van Kleef and Werquin (2013:656), would fall within the realm of "legitimate peripheral participation" because these im/migrants are actually engaged in

a reciprocal process of adapting to and changing the characteristics of their new communities. Hence, incremental normalization occurs.

Balikbayan Society and Transnationalism: Small Story 3

They are called foreign workers, overseas foreign Filipino workers [OFW], and they work all over the world now. They are so important that at the airport there is a special line for them at immigration. The Filipino economy would probably collapse without OFW … our big product there is the export of labor. There are millions of dollars that go to the Filipino economy from OFW. (Linda)

I do not know if the Filipino government tracts what we earn … I don't think they have a way of knowing how much comes into the country. When the person picks up remittance money, it is probably not taxed, but this is good for the Philippines because the recipients of the remittances spend the money there in the country. (Andrea)

I think Filipinos are taxed based on their earning overseas, the government is vigilant during the first five years to make sure the OFW pay their taxes because there is a rule. You have to provide the Filipino government with proof of your overseas income. They facilitate the visa and travel process, so the taxes are a requirement, plus, we send home *balikbayan* boxes. (Amalia)

So, when I go to the airport and I see people with these boxes, I know they are Filipino and they are *balikbayans*, although many back home would prefer

the dollars instead because with the currency fluctuation, they think they can get more with the cash, which is now USD 1 equals 42 pesos. But, then you have to figure out what you can get for that in the Philippines because it sounds great, but maybe a soda is 3 pesos. (Linda)

When we were still living there, there were guys who broke into our house because they thought we have lots of money, my husband was an OFW for four years. People tend to think you have lots of money if someone in your family is working abroad. (Andrea)

I also get the feeling that because we are in America, they think money grows on trees, you know, they think we work hard, but we get paid so well, why can't we share the wealth. In the past, when we go home, they would be grateful for what we bought. Now, they ask for Levis jeans, Estee Lauder. So if you bought them something from a dollar store, they are not going to be happy and think you are cheap. (Linda)

They expect us to take something for them. (Amalia)

Balikbayan culture does that. (Linda)

Every time we go on a trip, we have *pasalubong* [gift to individual], it's a remembrance and you bring it for everyone. So, like this past Christmas, I was the "Santa Claus," we had to send help to our families and disaster victims. (Andrea)

I helped by sending money for building their houses and provide for basic needs. That is what I want to do, and also they expect us to help out. (Amalia)

Small story 3 represents a complex mixture of sub-themes that emerged among the study participants. The first is that the speakers in this small story use the terms *balikbayan* and OFW interchangeably; this was a common practice among all the interviewees. They do not acknowledge the distinctions that the Filipino government policies ascribe to these two groups of migrants. The im/migrant's assertion that the Filipino perceived connection to the U.S. goes beyond the need to meet economic expectations is crucial. According to Van Kleef and Werquin (2013:657), "the connections that link communities may be intentional or circumstantial," they reflect normative and physical boundaries that construct the intersectionality of the im/migrants' identities and all the social components that allow them to "reify shared understandings of practice." This corresponds with Cui and Kelly's (2013) notion of the essentialization of ethnic culture over structural constraints/systems as an explanation for individual social behaviors. This is not withstanding the findings of researchers such as Nakhaie and Kazemipur (2013), which note that contact with ethnic-social networks, in many cases, does not yield positive employment and earning outcomes for many migrants (see: Sanders, Nee, and Sernau [2002] studying Asian immigrants in Los Angeles; Warman [2007] studying gender differential among immigrants; Beaman [2011] studying refugees in the U.S.; Nakhaie and Kazemipur [2013] reporting on black im/migrants). Notice how these studies, while supporting small story 3, also correspond with the last discourse that emerged from small story 2, which points to the consequences of inequality that are likely when im/migrants interact with some of the

social and economic institutions and agents in the host country. Additionally, the neoliberal policy context allows for dollar devaluations and more liberalized socio-political systems, and the appeal to engage in talent transfer multiplies. This is because the purchasing-power-differentials between the U.S. dollar and the Filipino peso give the OFW the expectation that their labor/skills will be worth more if they migrate. The communal norm in this emerging discourse on *balikbayan* society is one of dependency rooted in the individual and collective goal-seeking behavior of the im/migrants (Raza, Beaujot, and Woldemicael 2013).

Im/Migrant Identity, Equal Citizenship, and Forever Foreigners Narratives: Small Story 4

When I lived in the Philippines, I was special because I was American and my hair was light [brown, not black], so they called me *Kana 'yan*, which is the shortened form of American. Here, when people ask me where I am from, I would go, are you curious about my heritage or are you asking me where I live? I do not come right out and say I am Filipino because are you questioning me about what I look like or are you questioning me about my speech patterns? It is not that I am uncomfortable, but I just think I want to focus on the fact that my parents are Filipino because a part of their question is related to my skin color. So, I sometimes say I graduated from Greenville HS Pennsylvania and both my parents are Filipino, and that answers their question if it is about where your parents are from and not where I was born and raised. So, for me, when asked that question, it conjures up race, ethnicity, education, belonging, and it ties into identity, and this is not necessari-

ly just for you, me, but for other Filipino immigrants, too. (Linda)

I am reconstructing my identity of sorts. Maybe I just need to nurture my American identity and I need to work out or learn more about America. I am still new here so I need to find out the culture, what I am here, how I would function effectively, and sort of live my life as an American, while deep inside I am an established Filipino ... I think. (Andrea)

I think that even though we are American, there is always the subtle discrimination, and you will never be as good ... yes, we are like second class citizens because of our skin color and speech patterns. (Linda)

We tend to adapt our citizenship to suite the situations we are in ... it's easier. (Amalia)

For example, when my birth certificate said White, I was not disappointed, I feel like I would have been disappointed if it had said Black because of segregation back then. But, when I first saw my birth certificate, I said to my mom, we are clearly brown, and I felt bad, and this was in New York, and back then, you could only be black or white. Why can't they make a category for brown, we are not white. There are categories for South Asian or Pacific Islanders, I could check the Hispanic aspect because of our heritage, but I couldn't because I do not have the commonality of language. (Linda)

I am Asian as opposed to Pacific Islander. (Andrea)

One time, we were at a social occasion and my husband intimated that I was from the Philippines, and

they assumed that because I am Filipino I married to become an American citizen, to me, that is very pejorative. So, I said no, we met in college. It is irritating to me when such assumptions are made … I am torn about that because my family is lucky that they were here, I am lucky that I was born here. In the Philippines, you are Filipino by heritage, in America, you are American because you were born here. (Linda)

The storied citizenship experiences of this group of immigrants are not assumed to be transparent, but are the sources of multiple layers of meanings embedded in Gramsci (1971) hegemonic intellectual and moral discourse. In small story 4, the speakers' "knowledge is not neutral but is highly related to the social, economic, and political contexts in which it is created … it is rooted in and shaped by specific interests and social arrangements" (Banks and McGee Bank 2004:230). The speakers in this small story, like several of the other study participants, contextualize the power relations that play key roles in their lived citizenships. These power relations juxtapose notions of forever foreigners and visible minorities with the im/migrants positionalities. In concert, these factors force them to decide if they will align themselves with racialized minorities similar to them in appearance, or will they attempt to "pass."

Jo (2004:36) reports that among "many non-white immigrants, legal citizenship status does not make a difference in their daily lives … they feel alienated and are treated as foreigner or other by fellow citizens despite their status." This prompts Jo's (2004:36) questioning of what then makes one a "true citizens of the U.S." This leads to what Van Kleef and Werquin (2013) see as the complex

process of social interaction inseparable from the construction of knowledge and individual identity. Hence, it is the im/migrants' attempts to access new social settings that prompt their re/negotiation of their identities (Jacobson 1996). Critical Theory puts forward the notion of antideology, which, according to Hall (1997), is a set of ideas that construct how a group perceives reality and the world. The im/migrants in this piece are operating within the realm of CT's antideology, but instead of re/affirming their identities outside of the dominant socio-political structures, they have adapted practices that suggest they are moving more towards dominant norms. Essentially, Filipino im/migration has been construed as a process resulting from a form of internalized oppression among Filipinos and Filipino Americans before and after migrating to America (David and Okazaki 2006; Wiley 2012). The extent to which colonial mentality represents a general explanation of Filipino im/migration deserves closer scrutiny as research in this topic is still sparse and existing studies are limited in their methodological approaches, generalizability, and representations (David and Okazaki 2006).

According to Cui and Kelly (2013), the us/them division results in a forever foreigner identity of racialized minorities. This represents the lived truth of the speaker in small story 2, who talked about the disadvantage she saw in the use of a foreign accent. However, as mentioned earlier, the bidirectional assimilation strategy of many im/migrants may serve to counter, to some degree, this effect. In fact, in the forever foreigner narrative above, some of the speakers attempted to mediate this by re/negotiating not only their identities, but also how they

assert their lived experiences within the context of assumptions made about them. Assumptions that they perceive to be steeped in negative stereotypes about im/migrants.

Cui and Kelly (2013) pose the question, are all citizens equal regardless of race, ethnicity, and country of origin? In answer to this question, these writers suggest that there needs to be an exploration of the ideological and hegemonic function in constructing social identities and social relations in order to raise people's consciousness of race and ethnicity. This point is significant within the context of Filipino immigrants because it immediately compels an explanatory distinction between inter and intra group dynamics. Outside of their group, like other Asian immigrants in the U.S., the speakers in this piece are more inclined to identify with white/ness, a direct outcome of hegemonic influences in im/migrant self-identification (Ching Jen 2011).

The question then is why does this group of Filipino im/migrants reject the notion of *colored* in racial and ethnic classifications and gravitate away from established minority grouping *colored folks*, even when they are not first generation immigrants? Here, the imperatives of CRT challenge "conceptual models of U.S. citizenship in the context of intersecting dimensions of differences and present citizenship as a set of social and cultural memberships and exclusions beyond just political rights and legal status" (Ching Jen 2011:159). Henceforward, the articulation of identities is a product of social-geographies and socio-political circumstances. Subsumed in this is the notion that among this group of Filipino migrants, they think their citizenship is more legitimate than

other immigrant groups because of their ideological existence that translates into lived citizenship (Kang 2002). An exemplar comes from speaker (Linda) who expressed her feelings about being labeled White on a U.S. birth certificate, while connecting this to assumptions made about how she arrived at her U.S. citizenship once her ethnicity is identified. Her response suggests that she rejects being *othered*, thus consciously and deliberately narrates her citizenship so as to legitimize her legal status while still identifying her heritage.

Conclusion

Not all the critical discourses that emerged from the interviews with this group of Filipino im/migrants were included in this piece. Critical Discourse Analysis, along with Critical Theory, Dependency, and Neo-Coloniality, were apt analytical lens for the narratives that emerged from the interviews. Fairclough (1992:9) notes, "the link between socio-cultural practice and text is mediated by discursive practice." Hence, the analysis of the lived citizenship experiences of Filipino immigrants in the U.S. is embedded in the institutional frameworks that influence social relations. This points to the need to give more voice to their nuanced lived citizenship perspectives.

In concluding, we are compelled to focus on only two of the discourses that emerged—because of what a friend said to us. A Filipino friend read the first draft of this paper, when she was done reading, she said, "Racialized minorities? Don't you think that term is a little too strong to describe Filipino im/migrants? Forever foreigners, I have never heard us

being referred to as forever foreigners." These comments are instructive to say the least. Critical Discourse Analysis points to the use of discourse/narratives to re/produce social constructs. The Filipino im/migrants' narratives about race and skin color indicate that they do not identify with other minority immigrant groups of color because they are able to mask their accents and are able to pass as non-im/migrant citizens. Drawing parallels with notions of possessed territory (Cui and Kelly 2013), the legal political citizenship/status acquired/obtained/earned by many Filipino migrants and international migrants in general imparts a simplistic, un-layered perspective on the experiences of migrants in the U.S. This perspective delegitimizes how, for an immigrant, citizenship is multidimensional and ultimately embed-

ded in their citizenship acts/lived experiences. For many immigrants, all these perspectives are legitimate, right, and are indicative of their veracity, hence calling into question notions of equal citizenship. We, like Cui and Kelly (2013:158), pose the questions, "are we equal citizens regardless of race, ethnicity, and country of origin," and how do our answers to these questions influence our thoughts, feelings, and actions? If that is the case, does this not then make their citizenship flexible—a form of hybridizes of their lived experience/existence? And if so, are all first generation immigrants forever foreigners within the context of institutionalized metanarratives (see: Banks and McGee Banks 2004)? And if the concept of forever foreigners is applied, what then is these Filipino im/migrants right to place?

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Appendix 1. Filipino Immigrants Lived Citizenships. Interview Questions

Please read the statement below. If at any point during this interview you become uncomfortable with the line of questioning, we will stop.

The theoretical focus of this research is notions of citizenship. Here, citizenship is multidimensional and include the legal, political/nation-state, social, cultural, educational, economic, connectivities, global, and transnational component of a migrant's lived experiences. This research is not about whether or not you are legal, illegal, or have or have non-sworn in as a citizens of the U.S. The focus is on your perceptions, feelings, and acts of citizenship that define your existence as an immigrant in the United States. To maintain the integrity of your experiences/voice, I will attempt to tell your story as verbatim as possible. You will not be identified in any way in the published work. If you wish, I will send you a complimentary copy of the final document.

Open-Ended Questions/Themes for Interview With Filipino Immigrants

Motivations to migrate and recruitment

- Why did you migrate?
- To what extent do you think you had a choice about migrating to the U.S.?
- Describe the social and economic condition in the Philippines that may have influenced your decision to migrate.
- Why did you choose the U.S. and the current city you live in? Describe the extent to which friends, family, or a local Filipino community/organization influence where you chose to migrate to.

- If you had a choice, would you have chosen to migrate to another country/city (elaborate)?
- What role does language play in your decision to migrate and some of your migration experiences? Tell us stories about some of the examples of your experiences.

Transnational networks and the concept of home and the right to place

- How do you remain connected to your Filipino culture (language, foods, stores, restaurants, religion, networks, local communities, etc.)?
- How do connections to these networks make you feel?
- When the term "home" comes to mind, what is the first thing you think of? Why? How does this influence how you feel about living in the U.S.?
- Describe some of the experiences you have had that made you feel uncomfortable around Americans who are not immigrants. Why do you think this situation/s made you feel uncomfortable?
- To what extent do you feel like you belong to or do not belong here in the U.S.? How do you handle these feelings? How does it influence how you feel about your home country?
- Do you return to the Philippines for any reason? Elaborate and give examples. How does this make you feel?
- How do you give back to your relatives and friends who still live in the Philippines? How does this make you feel? Does it make you feel like you want to give more and why? Did the need to support your friends and family back home influence your decision to migrate? What role do you think the government of the Philippines played in your migration? If the government facilitated your migration through their policies, does that make you want to give back to your country?
- Would you assist family members and friends to come to the U.S.? Why? What are some of the advise you give to individuals in the Philippines about the migration process?

Identity

- As an immigrant, what does citizenship mean to you?
- How does living and working in the U.S. make you feel about your Filipino citizenship?
- Describe how you have had to reconstruct your identity: (a) since you migrated? (b) as you earn more and improve your social and economic status? (c) relative to the social setting you find yourselves in?
- To what extent do you feel like your identity and actions are dependent on where you are and whom you are interacting with? Give some examples.

Concerns about enforcement, detention, and deportation

- Do you know of anyone who had to return to the Philippines because his or her visa expired? Have you kept in contact with them? What is their story and how are they coping now? Do you feel obligated to assist them?
- Have you at any point been concerned about deportation (related to people you know or just Filipinos in general [illegal immigrants])? Elaborate on your reasons.
- Describe how you think you would cope if you had to return to the Philippines to live and work. What would be the reason/s you would have to return?

Thomas-Brown, Karen and Annalie L. Campos. 2016. "A Qualitative Analysis of the Lived Experiences of a Small Group of Filipino Immigrants." *Qualitative Sociology Review* 12(1):114-141. Retrieved Month, Year (http://www.qualitativesociologyreview.org/ENG/archive_eng.php).

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"This Struggle Bound Us." An Analysis of the Emotional Dimension of Protest Based on the Study of Four Grassroots Resistances in Spain and Mexico

Abstract   The aim of the paper is to present the results of our research regarding the role of emotions in local struggles. Focusing on the analysis from below, we have paid special attention to the emotions felt by ordinary people.

Our research shows that emotions are useful in order to understand struggles because they are present in every phase and every aspect of protest. We have seen that emotions play an important role in the day-to-day practices of the groups we have studied and that they interact with cognition in determining an individual's behavior. Emotions not only motivate individuals but they might change their beliefs, too. In conclusion, we have seen that emotions play an important role in the protest. They not only influence the emergence and maintenance, but also affect some outcomes of the protest at the micro-level, like empowerment.

Our research is based on in-depth interviews and narrative analysis of the biographical material, and the analysis gives special attention to the different labels we have assigned to different emotions, feelings, and moods that play an important role in the protest. We will present some results based on the analysis of four specific case studies: the insurgency of Oaxaca, Mexico (in 2006) and three resistances against dams in Spain and Mexico.

Keywords   Emotions; Grassroots Resistances; From Below; Transformation of Consciousness and Behavior; Empowerment

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Any person who has ever taken part in a collective action knows the emotional intensity that characterizes this experience. We are dealing here then with the injustice "that rips you apart" (E.Co.8)[1]—the wrath, outrage, and the indignation that lead to action, but also the impotence, frustration, and fear one can experience in the face of the impossibility to defeat injustice, as stated by someone who fought to save their people from the waters of a dam: "a mix of impotence and a lot of wrath, impotence and wrath, wrath and the wish to fight against something so unfair and, for me, inconceivable" (E.Ri.1).

But, these experiences are also characterized by joy, sympathy, and fraternity generated by the people who share the experience of struggle, as this Mexican woman says:

> … these are the words of a companion who is dead now: "This struggle bound us." And it is true. We, the women of the collective group, didn't know each other before and that struggle has bound us, and now we want to spread this relationship. (E.Oa.9)

As Goodwin, Jasper, and Polletta (2000:78) wrote: "It is hard to think of activities and relationships that are more overtly emotional than those associated with political protest and resistance," but for decades emotions have been excluded, kept away, and ignored by all the political analysts, driven by

a positivist view of the world that associated emotions with irrationality. In fact, "we have equivocally considered for a long time that thoughts and emotions were different things that could be separated" (Esquivel 2005:24 [trans. from Spanish—AP, TG]), but in the past fifteen to twenty years, "scholars from a wide range of disciplines have challenged the thought/feeling dichotomy and the equation of emotionality with irrationality, arguing instead that feeling and thinking are inseparably intertwined, each necessary to the other" (Gould 2004:162). Thanks to the work of authors who integrate emotions to the study of protest it has been proven that emotions, among other things, "help explain not simply the origin and spread of social movements but also their continuation or decline" (Jasper 1998:416-417). Emotions are "a key feature of society" (Flam and King 2005:3), they have significant effects on movements (Gould 2004), and besides the relational, cognitive, and emotional consequences of protest, they affect the movements themselves (Jasper 1997; della Porta 2008) and are related to the transforming capacity of protest. To conclude our starting point is, as Flam (2005:37) wrote, that "social movements produce a variety of emotions and feelings rules which have various, sometimes counter-intuitive, structural and action consequences," which must be studied in-depth.

Therefore, based on an empirical research where we have studied different experiences of struggles in Spain and Mexico, in this paper, we want to contribute to the comprehension of the role of emotions in the change produced by the participation in collective action. Our objective is not only to provide evidence of emotional intensity these

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[1] In this research, all the interviews are done under the condition of anonymity. For this reason, we will put only a label after each testimony: E.Co (Coín, Spain), E.Oa (Oaxaca, Mexico), E.Ri (Riaño, Spain), E.Sg (San Gaspar, Mexico). In the table at the end of the paper (see: Appendix), we describe gender, place, and time to each quoted interview.

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experiences have, showing the importance of incorporating this dimension to the analysis, but also to prove that emotions can motivate, as well discourage, and generate new outcomes out of the experience of struggle, giving a new meaning to the experience of protest.

The analysis that we present does not suggest incorporating emotions to the study of protest only, but also invert the look to those who participate in these experiences in order to understand their deepest and least visible dynamics, which macro-structural literature cannot perceive. We start by presenting what inverting the look from below consists of, then we present the emotions that play a key role in the analysis of these experiences, and the cognitive-emotional processes that people go through while living them. Lastly, we elucidate additional matters that are essential to comprehend conflict, such as collective, reciprocal, and shared emotions, and emotional energy. The purpose of this paper is to present the results of our research regarding protest and resistance, centered on the experiences of subjects involved in them, since focusing on the verbalized experience rather than the discourse surrounding particular phenomena allows including the processes that motivate people in struggle to change their way to see the world, hence allowing to see the cultural output of the protest.

Methodology

The methodological tools employed in our research have been a qualitative analysis of information collected through in-depth semi-structured interviews

to participants in the struggle against the dam in Riaño and then the recovery of the Valle (León, Spain, 1986-1987 and 2007-now), the struggle in defense of Río Grande—Grande river (Coín, Malaga, Spain, 2006-2007), the popular insurgency in Oaxaca (Mexico, 2006), and the struggle against the dam of San Nicolas (San Gaspar, Jalisco, Mexico, 2004-2005). The three cases of resistances against dams have been analyzed by Poma (2013), while the insurgency of Oaxaca is the subject of the ongoing research by Gravante (forthcoming).

Although in this paper we have quoted only a few extracts, Poma's research is based on fifty interviews, the large majority of them individual; while the first exploratory fieldwork carried out by Gravante in 2010 is based on nine in-depth interviews. Both researches started with an exploratory fieldwork to collect data about the cases studied and then to carry out some interviews in order to verify the initial hypothesis of these pieces of research and improve the questionnaires.

Every interview was audio-recorded digitally and then transcribed. Regarding the duration, they lasted between 45 minutes and two hours. That depended on the availability of the interviewees and the context in which the interview was carried out (home, work, public space, etc.). After the interviews, we wrote down some notes in our notebook, and for this comparative research we have compared our findings and shared the texts of the respective interviews.

The in-depth interviews were carried out applying the "episodic interview" technique (Flick 2000; 2006). As the author suggests, the researcher needs

to guide the interviewee in order to orient him/her to the topical domains, incentivizing people's narrative. Through storytelling, the interviewees recollect events and memories, and emotions emerge (Atkinson 1998; Poggio 2004).

In order to analyze the emotional dimension of protest, we employed empathy as a tool in order to feel what the subjects have felt, going inside the emotional processes which have been identified as most important in protest. For instance, as we will see next, indignation is a moral emotion which plays an important role in mobilizing people; so when an interviewee affirmed that something outraged him/her during the protest, we invited him/her to tell us what had happened by telling us his/her story. By recalling the event and the emotions related with it, people, to a large extent, re-experienced the same emotions, and shared them with us. Finally, it is important to highlight that working with narrative means not only to focus on the words that people use, but also on body language and other non-verbal communication, such as tears, sighs, silences, trembling.

The use of qualitative research methodology, which also included participant observations,[2] is support-

ed by the fact that "qualitative research has a more holistic vision and provides further importance to social interaction processes" (della Porta 2010:13 [trans. from Italian—AP, TG]). It is also necessary to evidence that said look requires an idiographic approach that considers subjects not as variables but as a whole inserted within its ecological, social, and historical context (Sanz Hernández 2000:53).

Working with ordinary people without a previously structured discourse, and focusing our attention on the subjective dimension of protest, we have given special attention to the emotive dimension with a narrative approach as we were more interested in the manner in which people described their world or their experiences rather than their factual reality. Due to the narrations, where both the vision and interpretation of the world of subjects emerge, we are able to comprehend the reality beyond the particular experience since, as written by Jedlowski, "every case reflects elements of the world where one is immersed" (2000:203 [trans. from Italian—AP, TG]).

In conclusion, we also believe, in tune with our analytical proposal that aims to achieve a subjective understanding of conflict, it is necessary to "reclaim the qualitative methods, given that what is expressed through them is the voice, even the gaze, the feel, the subjectivity of the subjects of the investigation" (Regalado 2012:172 [trans. from Spanish—AP, TG]).

All issues considered and based on the results of our empirical investigation will be addressed in the following section on the study of emotions as an

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[2] The participant observation in our research allowed us to become familiar with the groups/collectives/communities involved. Gravante spent several months in Oaxaca (in 2010 and 2013), while Poma, who carried out the comparative study, visited the villages involved in her research several times between 2009 and 2013. Her interviews were carried out from May 2010 to May 2011. Being a participant observer did not mean, in our case, to participate in the protest, but in the everyday life of the people interviewed—because emotions and attachments are visible in the daily routines of people. For instance, a walk along the river or the neighbourhood could enrich what people told us about place attachment; as well, collective events allowed us to observe the bonds created during the protest.

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explicative factor of protest, since it is impossible to understand the subjects and their experiences without considering their feelings. We have also decided to enrich this analysis with testimonies taken from the interviews with the participants, regarding their struggle experiences that have been studied by certain authors in recent years because, as stated by Romero Frizzi and Dalton, "the human accounts are the more eloquent" (2012:12 [trans. from Spanish—AP, TG]).

Inverting the Look Towards the Subjects and From Below

Analyzing the implicit emotional dimension in the experiences of struggle takes us to invert our look towards what Jasper (1997) defined as the cultural dimension of struggle, which encompasses cognitive beliefs, emotional responses, and moral evaluations. To do so, it is necessary to recover the importance of subjectivity and break the macro-structural vision of movements that legitimizes formal organizations, leaders, and activists as actors and recognizes structural changes only as outcomes. In fact, approaches such as political opportunities "ignored actors' choices, desires, and points of view: potential participants were taken for granted as already formed, just waiting for opportunities to act" (Jasper 2010:966). These perspectives in the study of social movements have constituted a barrier for the comprehension of collective action, so now "what is needed is a look towards the inside, capable of capturing all the underlying and invisible processes, and that can only be achieved through a long process of involvement in movements, not only with their leaders" (Zibechi 2008 [trans. from Spanish—AP, TG]).

Due to these reasons, to deeply understand the experiences of protest, it is necessary to set apart the structured discourse and the activists and leaders' points of view to focus on the individual and collective experience of people participating in order to be able to see "the millions and millions of refusals and other-doings, the millions and millions of cracks that constitute the material base of possible radical change" (Holloway 2010:12).

Making the experience of participants the center of analysis allows studying protest as a venue for experimentation where people redefine their way to see the world, making struggle an emancipating experience. To focus on the experience allows us to "comprehend social interaction from the viewpoint of its leading figures" (Jasper 2012:36 [trans. from Spanish—AP, TG]) because, among other things, experience cannot be delegated (Pleyers 2009:144).

Centering the analysis on participants and their experiences suggests inverting the look towards everyday life since "it is the daily experience of people that shapes their grievances, establishes the measure of their demands, and points out the targets of their anger" (Piven and Cloward 1977:20-21). To look at these experiences from below also means to "understand that it is what collective and individual subjects do day in day out, every day, that is intensely political" (Regalado 1990:176).

It is looking at everyday life that one can observe the "infrapolitics," or in other words, "a wide variety of low-profile forms of resistance that dare not speak in their own name" (Scott 1990:19), which is characterized by "informal leadership and non-elites, of conversation and oral discourse, and of surreptitious resistance" (Scott 1990:200). This concept is essential for the comprehension of apparently casual events of protest or insurrection, for it unveils the existence of a "hidden transcript" of the subordinate, which, on special occasions, emerges and becomes public. This "hidden transcript" "represents a critique of power spoken behind the back of the dominant" (Scott 1990:xii), "[it] is a social product and hence a result of power relations among subordinates … It exists only to the extent it is practiced, articulated, enacted, and disseminated within these offstage social sites" (Scott 1990:119), and it emerges in the social and marginal spaces when there are more people who share it. And that is where its transcendence lies, in experiences such as environmental conflicts, where this discourse becomes public and stimulates the protest. Although it is true that formal and organized movements can grant arguments to those affected, it is the hidden discourse that forms the substratum that fuels them.

The goal of our analytical proposal is to invert our look, directing it from below and towards the subjects in order to "see resistances beyond the subjects who appear in public space" (Martín 2011:8 [trans. from Spanish—AP, TG]). This way, we discern all those who, confronting reality on a daily basis, search for solutions and create alternatives that are ultimately political, as they turn into "cracks"[3] which undermines the stability of the dominant system.

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[3] Metaphor used in Holloway (2010).

Emotions in Protest

One of the difficulties in analyzing the emotional dimension of protest is determining what emotions we are interested in analyzing are since, as Goleman (1995:289) writes, "there are hundreds of emotions and many more different combinations, variations, mutations, and nuances in each of them." Among all the categories to be found in the literature, Goodwin, Jasper, and Polletta (2004), Jasper (1998; 2006; 2011) have been the ones who have mostly striven to theorize and propose a categorization of potentially relevant emotions in protest. From the proposal of this author we will distinguish the emotions according to their cognitive processing, being aware of the fact that emotions act in matrices, that is to say, in the same event, diverse emotions can occur and produce different responses, depending on a subject or a context, as it is, for example, with fear against repression, which sometimes induces people to hide or, in other cases, take the streets.

Therefore, we can identify emotions that are immediate reactions to the physical and social environment, which are notable for being quick—as they occur and end swiftly, for example, changes in the body or facial expressions—such as wrath, fear, joy, surprise, upset, and sadness. These emotions can have diverse effects on mobilization in order to motivate people to get involved in struggle since, despite being quick in expression, their intensity can be high, as it can be read in the following testimony:

I felt this madness … but this madness to take them and throw them away from where they came. (E.Sg.10)

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As we will see next, these emotions play a key role in the moral shock, though they do not influence more elaborate processes due to their swiftness since "other forms of anger and fear, more abiding than these sudden reflexes, are more central to politics" (Jasper 2006:162). Although these emotions represent only the first reaction to an event or information, one of the problems Jasper (2011:287) evidences is that "most authors adopt reflex emotions as the paradigm for all emotions," making it a strong limit to the analysis moving in this direction.

Moods, for instance, differ from the above emotions, as the former last longer and are not targeted to an object. As Jasper (2006:164) states, "moods may also affect our propensity to feel and exhibit other emotions, as in the case of a depressed person inclined to sadness or irritation, [and] filter our intentions and actions, strengthening or dissolving them, changing their tone or seriousness." Some moods, such as optimism or hope, play in favor of political action; others, such as desperation, fatalism, resignation, and cynicism, act against it, as we can read from this testimony of a man from Riaño:

> … now you see it, I don't know … with resignation because that's what you have … you won't change it. (E.Ri.3)

Moods are important to understand experiences of struggle because they influence the perception of reality and therefore the responses of the subjects, but also a change in moods can result from the experience of struggle, being successful in making, for example, someone an optimist, who was not before.

Other emotions that are fundamental in experiences of struggle are affective ties that can be the attachment or aversion to someone or something, or also the fact of not being related to an object or person but to a vision of the world. As they take much longer to build, they are very solid and difficult to change, making it necessary to have a moral shock for a change; this is why a change or threat to affection may have considerable consequences and lead to a deep change, as confirmed by the following account of a woman who took part in the Oaxacan movement:

> … the most important thing is unity, and we have it. For example me, I didn't know my neighbors well, and in the barricades, I met them better … That's how we created a community and other sorts of relationship, and I think that's the best ever, the ways to relate to each other and be together. (E.Oa.7)

Among the ties that are significant in the study of protest, in addition to the relations between people, we can find the place attachment that triggers many emotions, as seen in this testimony that evidences the pain produced by the threat of the loss of one's land:

> … when this movement against the dam starts, the first thing you feel is a lot of sadness because it's a piece of land where you live, and you learn to love it. (E.Sg.7)

Analyzing the role of place attachment in these experiences helps us to explain the intensity with which the affected people respond to the threat, defending their territory and their way of life with wholeheart-

edness, regardless of the magnitude of the physical loss—because the emotional tie turns the threatened territory into something inestimable for them.

Finally, we can find the defined moral emotions, which "require considerable cognitive processing" (Jasper 2006:165). These constitute "the largest group of emotions [that] arise out of complex cognitive understandings and moral awareness, reflecting our comprehension of the world around us and sometimes of our place in it" (Goodwin, Jasper, and Polletta 2004:422), for instance, shame, pride, compassion, outrage, indignation, and complex forms of upset, fear, and wrath that have to have been processed cognitively.

Within these moral emotions, outrage is one of the key emotions in the study of collective action because it is considered

> a powerful motivation for protest … It plays a significant role in the delegitimation of the polity and the engendering of collective action whenever state conduct is perceived as arbitrary … [And] because it provides "targets," it often leads people to confront state authority under revolutionary situations based on the perception of social injustice(s). (Reed 2004:667)

In our cases of study, for instance, outrage was produced due to the behavior of politicians who deceive, lie, and do not respect people, as this Mexican woman asserts:

> … the way politicians do … as trying to fool you … and I think this was the reason that rumbled us the most … when trying to fool us. (E.Sg.6)

As read from this testimony, outrage influences motivation for action, but, as the next section will show, it also plays an important role in cognitive processes, such as the creation of threat, the identification of those guilty or the *injustice frame*, all of which may have "altered their assessments of the costs and benefits of participation in protest" (Jasper 1997:203).

Another current figure is indignation—a feeling that is closely tied to the perception of an unfair situation. This emotion "involves a set of concepts, beliefs, and social expectations … [and] is provoked by the belief that some moral norm has been deliberately broken and that harm and suffering are being inflicted upon undeserving people" (Cadena-Roa 2005:81). In our cases of study, we can find various testimonies that show the emergence of this feeling of indignation, as can be captured in this Spanish woman's words:

> … if you start to dig a little, you'll start to get indignant … with everything that is happening now, people feel indignant. (E.Co.10b)

Indignation "is an emotion that results from empathy with the one who suffers and evaluation of the reasons why he suffers" (Cadena-Roa 2005:81), and this takes us back to the importance of collective emotions, to which we will dedicate our last section in this paper. As well, as Jasper (2011:292) has written, "indignation at one's own government can be especially moving, as it involves a sense of betrayal," that is manifested, for example, when the party in office does not fulfill their electoral promises, as it was in the case of Riaño:

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… the people up here deceived,[4] the people down there deceived, and who benefited from this? The party that left office this year … the Workers' Party[5] … that I can't tell whether it is for workers or not. (E.Ri.3)

Considered as feelings of approval or disapproval based on intuition and moral principles, moral emotions are related to the feeling of justice and injustice, of good and bad; they are cultural and social, influence motivation, and are so fundamental for change that, as we have mentioned, they have been considered, by authors like Jasper, Goodwin, and Polletta, the most important emotions in political processes.

As observed in this section of the paper, in experiences of protest, diverse emotions interact and influence the dynamics of collective action in various manners. From more instinctive emotional responses to emotions that imply a cognitive process, experiences of struggle are intensely emotional. But, how do emotions change protest? To answer this question in the next paragraph, we will discuss how emotions influence the cognitive-emotional processes through which we will analyze individual change, and its link with social change, considering that "existing studies on emotions suggest that micro-events have the capacity to affect, through time, bigger structures which will lead to the promotion of changes and the redefinition of the relations of power" (Enríquez Rosas 2008:206 [trans. from Spanish—AP, TG]).

Emotions and Cognitive Processes

"We will never be the same we were before"—this is what many people having lived an experience of struggle say; but what does this have to do with emotions? According to Jasper (1998), change is related to the emotions in question—the more intense they are, the deeper the cognitive processes experienced will be. In addition, emotions are "provoked by beliefs" (Rodríguez 2008:150 [trans. from Spanish—AP, TG]), an example of this is indignation; however, they also influence change of values and beliefs (Kelly and Barsade 2001), and that is when they become an explanatory factor to analyze cultural change. As Goodwin, Jasper, and Polletta (2001:19) assert: "each cognitive shift is accompanied by emotional ones," and this influences the final learning of the experience of conflict, conscientiousness, and the transformation of participants into political subjects that claim rights far beyond the motivation that led them to take part in the conflict.

The role of emotions in cognitive processes, that is, the processes through which human beings interpret the world and give it a meaning, allows us to explain how emotions transform protest into a motor of cultural change.

The cognitive processes we have analyzed in our research are: the moral shock, the sense of threat and the identification of the guilty ones, the injustice frame, the transformation of both consciousness and behavior, and empowerment. We have selected these five processes because we believe they are the ones that best allow us to comprehend the evolution that struggling people experience, making them change

their ideas, beliefs, and values. Each of these concepts has been put forward by experts in social movements to understand various dimensions of protest, but we think that analyzed as a whole, and also integrating emotions, as suggested by Jasper, they will enable us to deeply comprehend cultural change generated after a conflict.

The moral shock is the emotional response to an item of information or an event that puts the security of people at risk, or in Jasper's (1998:409) words, it occurs "when an unexpected event or piece of information raises such a sense of outrage in a person that she becomes inclined towards political action whether or not she has acquaintances in the movement." This moral shock can be produced due to the arrival of an expropriation letter concerning the construction of a dam, or the news of the violation of a human or social right, or as a result of repression in a protest, as exemplified in the following testimony of a woman from Oaxaca, Mexico: "What made us react was the repression" (E.Oa.3).

The moral shock is produced as a result of many emotions, such as surprise, fear, wrath, the feeling of insecurity, disappointment, outrage, indignation, et cetera. These emotions accumulate and are nourished by the hidden discourse that lingers in society (Scott 1990); in fact, there will be even more fear of what a government can do if a feeling of previous mistrust exists. This process is very important because the participation and involvement of people depend on it; also, it has an effect on the intensity that characterize a struggle, as this testimony illustrates:

> The time comes when you hear and ask … and that's when you are doubtful and afraid and you join the

people, unwittingly, I mean, by the time you realize, you're already deeply involved in everything. (E.Sg.9)

However, the moral shock, even though it is, to a large extent, necessary for a person to get involved, is not sufficient for eliciting change since other mechanisms to be analyzed here take place. The first response after experiencing a moral shock is the creation of threat and the identification of the responsible ones, which in turn will trigger other emotions because "when humans can be blamed for causing a threat, outrage is a common response" (Jasper 1998:410).

The construction of threat is important since "some sense of threat can be found in the origins of most social movements" (Jasper 1997:125), and it is fundamental in experiences of resistance. In the struggles, we have analyzed, the construction of threat can be initiated due to the disappearance of a village under water, with all the losses imaginable in terms of social relations, economic support, identity, et cetera, but also the loss of civic or political liberties, or the spaces of a city, which is related to the loss of identity in a certain place or the loss of natural, social, and economic resources, for example, a river, as in the case of Malaga:

> When you think about a threat with these characteristics, thinking of the disappearance of a river as a means of life, the truth is that you think about it twice. (E.Co.11)

The construction of a threat is accompanied by a high emotional intensity that goes from sadness after a loss to fear and to the feeling of uncertainty. This construction of a threat is also related to the

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[4] "The people up here" refers to people living in the mountains, while "the people down there" are people living on the plains, who were officially the beneficiaries of the water of Riaño's reservoir.

[5] Spanish Socialist Workers' Party (PSOE).

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idea of security and quality of life, as well as dignity, which is one of the "emotional benefits" (Wood 2001) of protest, and the perception of risk, which also depends on culture and emotions because said risk is perceived when there is only even one and a remote possibility that the threat may destroy the community, the way of life (Jasper 1997:122), as this interviewee states:

> They are affecting the only fertile lands we have here in the area ... That's how they are exhausting the villages ... They are wearing us out because it is the only one we have, it is the only heritage for the family and many people depend on it. (E.Sg.7)

Once the threat is built, the next step is to individualize those being guilty, which is an indispensable process in order to target the wrath and rest of emotions towards an objective. Having been able to detect those being guilty or having believed that "motivated human actors carry some of the onus for bringing about harm and suffering" (Gamson 1992:32) opens the path to what Gamson (1992:6) defined as the "injustice frame," that is, "the moral indignation expressed in this form of political consciousness." Framing an experience one has gone through as an injustice and recognizing that one is being a victim of an injustice are both processes that influence the motivation for action and strengthen the reasons to continue being involved in the conflict, far beyond any material interests, cost-benefit evaluations, and discourses, as this Mexican woman points out:

> How can you allow an injustice to occur? ... I say, if there are people who want to fight for it, I just have to

join, and, of course, you have to defend it because it represents your dignity, as well. (E.Sg.6)

The processes described thus far let us understand how and why people get involved in a collective action and how far they are willing to go. Both emotional responses and cognitive processes foster each other and encourage participation, but they are also the cause for change that the main stakeholders experience. In order to analyze this change, we have resorted to two processes: the transformation of both consciousness and behavior, described by Piven and Cloward (1977), and empowerment. As written by Piven and Cloward (1977:3-4), "[t]he change in consciousness has at least three distinct aspects … The change in behavior is equally striking, and usually more easily recognized, at least when it takes the form of mass strikes or marches or riots."

The three aspects of change in consciousness these authors highlight help us define some dynamics we have been able to observe in our cases of study, which we will describe next. The first aspect— where this process takes place—is "the system," that is, when authorities lose legitimacy, as shown in the following testimony:

> This guy [tells me], "Since they are from the government, we are going to praise them." [To which I answer], "Why?" (E.Sg.5)

The loss of legitimacy is related to the loss of trust and respect towards the subjects who have been identified as guilty, but also to the loss of fear towards the authority. This loss of legitimacy occurs as a result of the deferred treatment towards those

protesting, but it is also a consequence of what is defined in popular terms as "adding insult to injury," in other words, not only are people deceived but they are being deceived constantly and cynically. The lack of clarity and transparency, the authoritarian attitude, and the lack of respect also take part in the loss of legitimacy, proving that this process is likewise the result of the emotions experienced. The second stage in this process is produced when "people who are ordinarily fatalistic, who believe that existing arrangements are inevitable begin to assert 'rights' that imply demands for change" (Piven and Cloward 1977:3). As we have seen in our cases of study, the loss of legitimacy in media mainstream or regarding the representatives of institutions leads to the pursuit of autonomy, that is, people look for means to overcome the barriers imposed by power. That change in behavior deals with distancing the practice of delegating as a means to meet their necessities, as can be seen in many alternative media arising from a conflict, and in tune with this Mexican interviewee's testimony:

> We are not going to leave it in the hands of a lawyer or a political group because this is a problem concerning us. (E.Sg.7)

Furthermore, Piven and Cloward (1977:4) mention the emergence of a "new sense of efficacy" produced in "people who ordinarily consider themselves helpless [but eventually] come to believe that they have some capacity to alter their lot." During our research, we have been able to prove that numerous people taking part in a struggle experience this transformation, and the following account shows this:

We thought we couldn't fight the government ... but we can, if people are united. (E.Sg.2)

This process is also influenced by emotions. In fact, in the cases where people are victorious, even if these victories are small, emotions such as joy and satisfaction nourish self-esteem and the consciousness that many things can change, while when failure to win occurs, emotions such as frustration and pain usually lead to resignation, though emotions like wrath or the feeling of injustice can overcome this mood and provide the energy necessary to retake the struggle, as it occurred in the case of Riaño:

> The rage was much greater than the impotence and everything else, even impotence gives you rage, it happened to me. (E.Ri.1)

The last aspect of this transformation of consciousness described by Piven and Cloward (1977) leads us once again to the concept of empowerment, indicating an individual and collective process of the acquisition of power, not as "power on someone," but as "power to," as a potentiality (Dallago 2006). Among the many definitions of empowerment that can be found in the existing literature, we adopt the one which considers it to be "a social-psychological state of confidence in one's ability to challenge existing relations of domination" (Drury and Reicher 2005:35), as regarded by the interviewees as a piece of learning:

> The movement gave us a really big lesson, [for instance], the fact that we can get many things just by being organized. (E.Oa.9)

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In our cases of study, empowerment, identified by Wood (2001) as an emotional benefit from the participation in a movement, is both personal (overcoming fear, higher self-esteem, etc.) and collective (capability of changing reality, of self-management, of defeating the government, etc.), demonstrating the idea of authors like Drury and Reicher (2005), Lake (1993), or Krauss (1989), who have considered empowerment as one of the outcomes of movements. According to this literature, focusing on internal and subjective dynamics of protest allows highlighting the transforming capability of these experiences that eventually are proven right in social, cultural, and political laboratories.

Finally, we conclude with a reminder of the fact that although it is the individual who experiences these processes and feels these emotions, protest is a social event that both unity and solidarity can strengthen, counterattacking emotions like fear or desperation, which can be discouraging. Collective emotions favor group solidarity and the identification of the movement. Therefore, it is as well important to analyze the emotions between the people that share this experience of struggle, to which we will dedicate the last section of this paper.

Emotional Energy and Collective Emotions

As we have stated, emotions interact with each other and work in matrices. For example, in face of a police charge, we can feel fear and indignation at the same time, and both emotions can activate a moral shock that can in turn influence our opinions about the government or the authorities. Similarly, the in-

teraction between affective ties and moral emotions can strengthen collective identity, as in the case of many environmental conflicts, where threat to territory to which we feel attached, invoking the feeling of injustice regarding what is happening, strengthens the feeling of belonging to that place and the identification with all those who share the same threat.

As for the interaction among all these sorts of emotions, we found the concept of "emotional energy,"[6] which is dispersed in the social interactions, and that can transform reflex emotions into moods, affective ties, and even into moral emotions (Jasper 2011:294). According to Collins (2012:2), "emotional energy takes the form of courage, feeling strength in the group, and belief that we will win in the end," or in words of a Mexican woman:

> … you feel this satisfaction when all these people respond, and all the people are united, that even if things occur, when I see all the people are motivated, eager to defend their rights, I think that is the greatest of satisfactions … seeing that others want to crush you … but the positive attitude of people makes them not give in nor quit. (E.Sg.6)

This energy emerging at collective moments and in rituals contributes to change as the fuel for collective action. Hence the importance of collective moments in protest, of music and dance that often

accompany these experiences, of public demonstrations, and small achievements since "each victory, even a small one, yields confidence, attention, and emotional energy, all of which are advantages for further action" (Jasper 2011:296).

The concept of emotional energy takes us back to the collective dimension of emotiveness, where emotions are strengthened, recreated, and are "contagious," all of which made us identify—in the experiences of struggle—collective emotions that are divided into shared and reciprocal emotions. The shared emotions are those that demonstrators share among them, and are, for instance, experienced during protest. They can be attributed to positive experiences, such as the joy after a small or great victory, or negative experiences like repression. These emotions allow enhancing "the affective and moral connections of those who are more identified with the movement" (Romanos 2011:100 [trans. from Spanish—AP, TG]), and help overcome, for example, fear, as this Mexican woman expressed:

> We went to some demonstrations, there were two buses, and it is really cool because first you feel this fear as you know what you are going to encounter … you're always nervous when you go [because] you don't know what is going to happen ... but as everybody goes, and that encourages you. (E.Sg.6)

Reciprocal emotions, on the other hand, are those felt one with another, "these ties of friendship between the members of a social movement … that encourage the participation of people in the movement" (della Porta 1998:223 [trans. from

Spanish—AP, TG]). Some of these reciprocal emotions are respect, trust, and gratitude that can be felt towards those mostly involved in the organization; and also hate, scorn, and pity towards the ones responsible. This strong emotional intensity strengthens the creation of an antagonist identity between "us" and "them." In addition, reciprocal emotions create new and strong ties between people, and in this sense, said emotions impact upon the unexpected results of protest, and that may give birth to new political and social projects, as stated in this testimony:

> I met these people through Río Grande[7] … through Río Grande there are many people who have realized there are many common interests … and now, for example, there are groups created to do it, in fact, they are doing it here, as is our case, for example. (E.Co.7)

Reciprocal emotions prove to be the foundations of collective identity that in turn can be defined as "an individual's cognitive, moral, and emotional connection with a broader community, category, practice, or institution" (Polletta and Jasper 2001).

In short, collective emotions become stronger with one another, influencing the process of giving a new meaning to the protest and favoring solidarity in the group, as well as the identification of the movement. These emotions also play an important role in the pleasure of the protest and in the creation of a culture of the movement, and this makes

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[6] Term employed by Collins (2001; 2012) and Jasper (2011), though the concept is not new in classic literature. Durkheim (1915), for example, addressed "collective effervescence" concerning the importance of singing and dancing as a means to share knowledge and increase the feeling of belonging to the group.

[7] Río Grande is the river threatened by the hydraulic infrastructure. In this case, the name of the river was used by the interviewee to make reference to the experience of the protest.

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them a key element to understand not only the motivation to action but also the dynamics that allow the movement or the group to continue and persist. James Jasper adds that while analyzing these emotions, the scale is essential, since emotional dynamics do not develop in the same fashion as in small or big groups, hence the importance to analyze local experiences of struggle from below and also focus on the micro-dimension of the protest, where these dynamics eventually emerge.

Regarding this collective dimension of emotions, it is worthwhile bearing in mind the importance of empathy, as the ability to feel what others are feeling, and the emotional contagion, that is, "the processes whereby the moods and emotions of one individual are transferred to nearby individuals" (Kelly and Barsade 2001:106). This contagion is important since it amplifies emotions and makes people feel them collectively, promoting participation and increasing, for instance, the feeling of efficacy, as this Spanish woman asserts:

… I think that every one of us was transmitting this emotion, the emotion to say, "Great, everyone in Coín has joined thanks to this," and this makes it even more contagious in fact. (E.Co.5)

As Collins (1990:42) suggests, "joy and enthusiasm are particularly strong when an assembled group is collectively experiencing this expectation or achievement of success. Further, the group itself by successful emotional contagion can generate its own enthusiasm." This emotional process explains why people decide to self-organize after the protest. The emotions related to positive experiences

lead people not to lose what they have reached during the protest, such as the new bonds. For this reason, they keep organizing in groups and collectives in order to develop new social and political projects, in which they recreate new spaces (symbolical, emotional, sometimes physical spaces). These people, as a consequence of the protest experienced, for the first time feel they can build their own spaces, and this is a crucial moment in their lives because this is the moment when these spaces become real and these people start empowering themselves.

In the analysis of the protest, empathy is important because, on the one hand, it nourishes indignation and solidarity among those who undergo similar experiences, while on the other hand, the lack of empathy, for example, from governments and politicians, separates citizens from some institutions that do not know, do not want, or cannot understand them, causing a process where we can observe how "the frustration of not having an impact or sometimes not being heard shows why protestors often adopt as targets the governmental procedures that have failed to protect or aid them" (Jasper 2011:291-292). Empathy produces a tie between people who do not know each other and that have not undergone the same experience; however, they recognize each other as they struggle side by side against that antagonist identity between the "us" and "them." Among the unexpected results of protest, empathy makes people participate in other experiences, being supportive to other collectivities or communities, but it also helps to overcome prejudices towards those struggling, as this interviewee points out:

If you see a gathering of people demonstrating, when you have never lived something like that, you usually think it's about people who do not have a reason for what they are doing, and what they're doing is ridiculous. (E.Sg.7)

Although there may be even more issues to analyze, we conclude this section, where we have presented the role of collective emotions in protest, being aware of the fact that an in-depth analysis would take longer. We have, nonetheless, shown here the elements for an analysis of the emotional dimension of protest, which, in our opinion, cannot be ignored in such study, and should only be carried out from below. In order to make an account of what we have presented here, our conclusions regarding this proposal are presented as follows.

Conclusions

The aim of this article was to provide evidence of the role of emotions in protest—at the micro-level—in order to contribute to the comprehension of the process of transformation of consciousness and behavior as experienced by participants.

Based on empirical work, what our analysis highlights is the relevance of incorporating the emotional dimension of struggles in order to deeply understand, on the one hand, why people protest, and on the other hand, how the experience of protest changes people who protest. Without inverting the look from below, that is, centering the analysis on the experience of ordinary people who protested, which includes the analysis of the emotional

dimension of their experiences, we would not be able to appreciate the effects that the protest produced on people.

Our analysis shows, for example, how the experience of protest helps people to overcome fear and prejudices and create new bonds. If people start to defend their territories because of anger, or even because of the grief they felt when they knew their villages could disappear under the water, during the protest, emotions and beliefs change, eventually altering them, as well. As we have seen, a victory can make someone more optimistic; getting to know people in a barricade can help them to recreate a community. During the protest, people recover solidarity, but at the same time, they change their feelings towards the State, which betrayed or violently repressed the protest.

In order to analyze the emotional dimension of protest, we decided to analyze the emotions that had been considered the most relevant in protest, distinguishing between emotions as automatic responses to events and their most complex variations. Next, we presented how moods can affect the dynamics of protest, favoring or discouraging it, and finally, we dealt with the moral emotions that provide arguments and legitimacy to protest.

Observing emotions in regard to some cognitive processes has allowed us to demonstrate how struggle changes people and how the emotional intensity characterizing these experiences is highly connected to change. Analyzing the moral shock, which produces a change in the way of seeing the world, we can understand how the protest becomes

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a breakage in the life of the subjects. Comprehending the threat perceived by the subjects allowed us to understand their response and participation in the protest. In fact, as we saw, a dam is not only a hydraulic infrastructure that changes a stream but it also is the end of a village, meaning the roots, the memories, the human relationships, and the privacy and identity of the villagers, among other features. And it is understandable that against a threat of this magnitude, people react as if they had nothing more important to be worth fighting for. Finally, the transformation of consciousness and behavior shows the processes through which people participating in the protest start to empower themselves.

To conclude, we have described how emotions generate what some authors have named "emotional energy." In fact, it can be asserted that protest, though seen as a tough experience, provides stakeholders with emotional benefits that explain why people get involved, though the costs apparently outweigh the benefits. Emotions associated with both negative and positive experiences act as a whole. However, emotions related to negative experiences allow us to understand, for instance, why people seek peace and quiet after their participation in a protest, as it was evidenced in the experiences of people who participated in the insurgency of Oaxaca.

We have also addressed the importance of ties between people and collective emotions. In fact, conflict is characterized for being a collective experience that creates ties which do not disappear when the experience ends, and that can motivate,

favor, or hamper participation; likewise, we have been able to observe how all these elements influence the empowerment of people. These ties have an effect on the interpretation of reality, trigger action, and are crucial motivations in political action, since it is from personal ties created during the experience of struggle that new political and social projects can arise, solidarity be recovered, and the mutual support and empowerment strengthened.

The analysis we have presented in this article, commencing with the consciousness of the emotional intensity these experiences have, shows how—by inverting the look towards the experience of the subjects—it is possible to appreciate the effects of protest on people. Therefore, not only do we join the authors who have highlighted the importance of emotions in protest in the last twenty years but we also try to contribute and offer an explanation regarding how emotions are important in protest—a research question which undoubtedly needs much more empirical work and theoretical development.

Acknowledgements

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Appendix

Table of the interviews.

LABEL	GENDER (M/F)	PLACE	DATE
E.Oa.3	M	Oaxaca, Mexico	Dec. 2010
E.Oa.7	M	Oaxaca, Mexico	Dec. 2010
E.Oa.9	F	Oaxaca, Mexico	Dec. 2010
E.Ri.1	M	Riaño, Spain	Aug. 2010
E.Ri.3	M	Riaño, Spain	Aug. 2010
E.Sg.2	M	San Gaspar, Mexico	Nov. 2010
E.Sg.5	F	San Gaspar, Mexico	Nov. 2010
E.Sg.6	F	San Gaspar, Mexico	Jan. 2011
E.Sg.7	M	San Gaspar, Mexico	Jan. 2011
E.Sg.9	F	San Gaspar, Mexico	Jan. 2011
E.Sg.10	F	San Gaspar, Mexico	Jan. 2011
E.Co.5	F	Coín, Spain	May 2010
E.Co.7	M	Coín, Spain	May 2010
E.Co.8	M	Coín, Spain	May 2011
E.Co.10b	M	Coín, Spain	May 2011
E.Co.11	M	Coín, Spain	May 2011

Source: Self-elaboration.

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