Yudit Namer,
Anne Stöcker,
Amani Ashour,
Janine Dieckmann,
Philipp Schmidt,
Carmen Zurbriggen
(eds.)
Intersectional Challenges to Cohesion?
On Marginalization in an Inclusive Society

Forschungsinstitut Gesellschaftlicher Zusammenhalt

campus

Intersectional Challenges to Cohesion?

"Social Cohesion" Series

The Research Institute Social Cohesion (RISC) investigates social cohesion from a variety of disciplinary perspectives and methodological approaches, researching terms and concepts, sources and threats, consequences and effects, and historical, global, and regional contexts of cohesion. The RISC has been funded as a joint project by the Federal Ministry of Education and Research (BMBF) since June 2020 and comprises eleven sections throughout Germany. The RISC's members include the Technical University of Berlin, the universities of Bielefeld, Bremen, Frankfurt, Halle-Wittenberg, Hanover, Konstanz, and Leipzig, the Sociological Research Institute Göttingen, the Leibniz Institute for Media Research Hamburg, and the Institute for Democracy and Civil Society Jena.

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Volume 7

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Intersectional Challenges to Cohesion?

On Marginalization in an Inclusive Society

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Contents

Foreword by Justin J. W. Powell

As the title of this volume quixotically suggests, the relationship between diversity, social cohesion, and marginalization in contemporary societies is complex—and contested. On the one hand, embracing diversity within community is essential for social cohesion. The human rights norms that support the building of pathways towards a more inclusive society are now legally binding worldwide. 190 state parties have now ratified the UN Convention on the Rights of Persons with Disabilities, which establishes legitimacy for inclusion and facilitates the active reduction of barriers that disable. These general and specific goals of such human rights charters should be respected across political positions and perspectives. On the other hand, factors such as frequent social and political polarization, persistent educational, economic, and social inequalities, and myriad forms of discrimination challenge utopian visions of cohesion across the boundaries etched in individual identities and between social groups within stratified societies. Especially in our time of renewed ethnic conflicts and wars, which always produce vast trauma, impairment, and forced migration, the gaps between ideals, rhetoric, and lived realities extend, often to the breaking point.

Marginalization, discursive and physical, of vulnerable groups remains a significant obstacle to achieving fuller, expansive inclusion in any era. Types of discrimination—from ableism and ageism to homo-, trans- and xenophobia as well as that based on gender, race or ethnicity, socioeconomic status, or religious beliefs—result in barriers to (full) participation in society, unequal access to resources, services, and opportunities; to unequal treatment or even denial of rights; and frequent prejudice, hostility, and negative stereotypes. Often, such discriminations intersect and compound each other, resulting in complex experiences of marginalization for individuals or groups who may face multiple forms of discrimination simultaneously.

Reflecting these challenges in academic and social contexts, the editors rightly highlight the importance of understanding just how differently those in marginalized groups experience social cohesion—or the lack thereof. Collect-

ing a mosaic of perspectives, they show how this contributes to identifying the structures and the dynamics of building a more inclusive society. The arduous work of rooting out sources of discrimination, both explicit and implicit, and meaningfully displaying the humanity, solidarity, and specific bonds that bridge our differences, requires communication, commitment, and patience.

This book addresses these identified issues by providing a kaleidoscopic examination of social cohesion and marginalization drawn from diverse disciplinary perspectives. Incorporating theoretical and methodological discussions alongside empirical case studies, this plentiful volume sheds light on the indivisible complexities these social issues pose for understanding each other—and actively living together—now in an increasingly networked social (media) world. The editors have organized the chapters into sections that cover theoretical frameworks, specific contexts of marginalization, such as poverty, dis/ability, and migration, and collective action efforts aimed at addressing these intertwined issues. Leveraging their positionalities and experiences in a range of contexts, and helping the readers reflect on theirs, the contributors also help us cross the all too rigid boundaries between academia, policy, and practice, as they apply a range of theoretical frameworks, methods, and timeframes within their studies.

Emphasizing how key are communication and language(s), including sign; sharing identities and experiences of marginality; as well as inclusive educational and community-based (and emancipatory) research processes and results, these diverse contributions from different regions of the world show how each of us may facilitate inclusion by better understanding our own experiences of and complicity in exclusionary processes and that faced by others near and far. In reflecting on our own positionality and going beyond our comfort zones, we may find new common ground—and build more inclusive communities on that basis.

Justin J. W. Powell; March 03, 2024

Intersectional Challenges to Cohesion?
On Marginalization in an Inclusive Society

Yudit Namer, Anne Stöcker, Amani Ashour, Janine Dieckmann,
Philipp Schmidt, Carmen Zurbriggen

Abstract

Despite the acknowledged importance of diversity and intersectionality in foster-
ing inclusion and equity, challenges persist as diversity is sometimes juxtaposed
against social cohesion. Meanwhile, societal polarization and inequality exacer-
bate marginalization, hindering social inclusion and perpetuating discrimina-
tion. Various dimensions of marginalization contribute to unequal access to re-
sources and opportunities, further exacerbated during crises. Discrimination and
marginalization threaten social cohesion, fostering exclusion within ostensibly
inclusive societies. This edited volume underscores the need for inclusive theo-
ries of social cohesion that incorporate diverse perspectives and experiences of
marginalization, aiming to strengthen collaborations for a more inclusive soci-
ety.

Keywords: diversity; social cohesion; marginalization; intersectionality; inclusion

Embracing diversity is a foundational element of social cohesion in an inclusive society guided by a human rights framework. Rather than regarding (super-)diversity as a societal asset and intersectionality as a crucial concept for promoting inclusion and equity, however, diversity is sometimes pitted against social cohesion. At the same time, social cohesion is increasingly challenged by polarization and social inequality. These developments, in turn, reproduce and reinforce discrimination and social marginalization and reduce social inclusion. While contemporary societies claim to be inclusive, they generate and preserve many forms of marginalization.

This is evident in the inequality of access to resources and opportunities (e.g., health and education), but also with respect to the inequality of aspects of representation and participation that characterize the current moment. Marginalization can result from the stigmatization of a singular characteristic, but is also driven by interwoven and mutually reinforcing processes that involve multiple dimensions of stigmatization. This can be expressed in the aforementioned terms of super-diversity (Vertovec 2007, 2023) or intersectionality (Crenshaw 1989, 1994, 2017). Life situations arise from manifold circumstances over the life course, which may result in a person being ascribed certain characteristics or labels and regarded as belonging in social sub-groups or categories that are associated with different stigmatized characteristics. Age, geographic origin, nationality, culture, religion, gender identities, sexual orientations, disabilities, precarity due to (mental) health status, living conditions, and socioeconomic status are some of the many determining factors. In general, various forms of discrimination that are intertwined with these social categorizations result in different levels of access to and provisioning of resources—a process exacerbated by crises.

Inequalities and (negative) consequences can accumulate. Many of the aforementioned characteristics intersect and culminate in layers of discrimination. Discrimination intertwined with marginalization can be linked to various ideologies of essential inequality, such as sexism, racism, and ableism. Discrimination and marginalization pose an inherent threat to social cohesion. Inevitably, their consequences are forms of exclusion within a supposedly inclusive and equal society.

Nevertheless, more often than not it is precisely in these experiences of marginalization that new possibilities of utopian societies are imagined and different approaches for social transformation are mapped out. Here as well, questions and debates about social solidarity and cohesion are at the center of discussions about the question of how we (whoever we are) as (an international) society want to live and who *we* want to be. Possibilities, challenges, and pitfalls of allyship and solidarity across various differences, sensitivities, and communities

are crucial to consider along the path towards a more just world for all. Reflecting on experiences with both positive and negative potentials for practice and theory enrich debates not only for practitioners and activists, but also for researchers and academics.

Why this book? As researchers from diverse backgrounds who started working together within the Research Institute Social Cohesion (Forschungsinstitut Gesellschaftlicher Zusammenhalt), we identified a need to reflect on the theory of social cohesion, while taking different experiences of marginalization into account. Rather than offering discussions of democratic questions grounded solely in political science and sociology, we opted to offer a broad disciplinary consideration of social cohesion and marginalization, ranging from social psychology to linguistics. While edited volumes and monographs on similar topics exist, some are situated in a single national context and/or target specific social fields like migration or economics. This volume attends to many intersecting markers of diversity in various areas of society and life. Furthermore, this interdisciplinary volume covers diverse processes of marginalization.

This book features marginalized perspectives on social cohesion and its challenges. It aims to advance an inclusive theory of social cohesion by synthesizing conceptual work, practical experiences, and reflexive positionalities. It also seeks to contribute to debates about how super-diverse/intersectional collaborations for an inclusive society can be strengthened, encouraged, and built to last. Analyzing the stumbling blocks of previous collaborative attempts at building inclusive societies allows us to learn from past experiences. Our innovative approach here is to focus specifically on the neglected relationship of social cohesion and diversity. In so doing, the volume incorporates lived experiences of marginalization, is diverse in theoretical and epistemic viewpoints, and allows for engagement by different audiences.

How did we achieve these aims? We invited theoretical as well as empirical approaches, general and specific discussions. Relatedly, we did not follow uniform definitions, and welcomed a multitude of definitions of intersectionality and social cohesion. One of our goals with this book is to facilitate the transfer of knowledge from communities into academia, and vice-versa. Therefore, we encouraged contributions from practice partners and groups involved in collective action against marginalization to contribute their perspectives and to increase academic understandings of lived experience. By explicitly incorporating the perspective of marginalized groups, the book not only ensures the transfer and anchoring of research questions in the lived realities of those affected; it also ensures that the affective component of cohesion is taken into account. Contributions are written for a broad audience of academics, professionals from various disciplines, policymakers, activists, and marginalized groups themselves. Con-

tributions are therefore both short and long, and the volume features one conversation between colleagues. Our hope is that academics and students will use this book in the classroom. Many of the chapters are suitable as introductory and advanced course readings. Moreover, some could be used by collectives in their advocacy and collective action.

The chapters are organized into several sections. The first section gives a theoretical introduction to central concepts of the book (social cohesion, marginalization, intersectionality) in relation to each other. In the first chapter, Aydın Bayad, Elif Sandal-Önal, Meral Gezici Yalçın and Ekrem Düzen provide a refreshing account of the conceptual choices surrounding social cohesion in the existing literature, situated between scientific empiricism and political idealism. Focusing on European societies, the authors adopt the minority perspective and argue against the assumption that diversity is inherently incompatible with social cohesion, emphasizing the importance of considering the *social dimension* that encompasses diverse perspectives in society. They critique current operational definitions for neglecting this aspect and discuss potential pitfalls in understanding social cohesion in relation to individuals, communities, and society. Next, Amani Ashour and Janet-Lynn Holz introduce a novel theoretical take on intersectionality, building on Hark's concept of cohabitation as a potential foundation for social cohesion through democracy and universal care. They introduce the concept of *intersectional proximities* to explore cohabitation, solidarity, and allyship. The chosen examples from Human Animal Studies and of Israeli solidarity with Palestinians demonstrate how the proximity between groups differently positioned in structures of discrimination influences their mutual experiences of and responses to discrimination. This section is enhanced by empirical inquiry into discrimination as experienced intersectionally. In the following chapter, Sophia Aalders, Steffen Beigang, Miriam Zineb Meksem, Lara Kronenbitter and Janne Schleifer examine the frequency of discrimination in everyday situations based on various sociodemographic characteristics and investigate how these experiences change when multiple marginalization factors intersect. They also explore the strategies individuals employ to avoid discrimination and assess the impact of discrimination on social cohesion, particularly when discrimination is rooted in multiple forms of marginalization. On the basis of two population surveys in Saxony and the rest of Germany, the authors conclude that discrimination and coping strategies impede social participation, posing a potential threat to social cohesion.

Case studies form the next section. These focus on specific aspects of the discourse (e.g., different forms and areas of marginalization). In this section, specific contexts of marginalization such as welfare eligibility, disability, or migration illustrate the diversity of marginalizing processes and intersecting

of marginalization experiences (such as deafness and migration). This section demonstrates how diverse life situations impact social cohesion. Philipp Schmidt highlights the often overlooked association between mental disorders and various forms of marginalization, including social, economic, and political exclusions, both at an individual and societal level. Emphasizing the underreported role of mental disorders in the dynamics of marginalization, multiple disadvantages, and intersectionality, Schmidt's contribution underscores the importance of consistently considering mental health in research focused on these interconnected areas. Jennifer Eckhardt then explores the German concept of *Bedürftigkeit*[1], investigating its multifaceted nature as both a socio-statistical category, a societal classification, and a fundamental aspect of human existence. Drawing on a study focused on the non-request of social benefits, Eckhardt discusses the transformation brought about by activation policies, which have shifted the perception of citizens from passive recipients of social assistance to active individuals capable of overcoming *Bedürftigkeit* through personal efforts—if they possess sufficient motivation. This analysis highlights the evolving role of *Bedürftigkeit* within the context of changing welfare paradigms, emphasizing the transition under activation policies from the figure of the welfare state citizen to the figure of the empowered and self-reliant active citizen.

Moving on to communication-based marginalization, Anne Stöcker and Yudit Namer engage in conversation about the consequences for social cohesion of marginalization through everyday communication. They discuss marginalizing mechanisms and include for ideal, inclusive communication situations, illustrating possible and realistic ways to substantially reduce or eliminate marginalization through communication in order to enable a socially cohesive society. Considering communication from a different perspective, Julia Gspandl delves into the intersectionality of identities in Deaf migrants, discussing their roles as minority language users, migrants, and individuals perceived as disabled. Focusing on the integration of Deaf migrants who can sign and have engaged with the Austrian Deaf community, the study, conducted through semi-structured interviews by a Deaf signer of Austrian Sign Language, explores the past and present social experiences of Deaf migrants in Graz, Austria. The findings reveal instances of discrimination by hearing individuals, but also highlight a strong sense of cohesion among Deaf peers, suggesting that many participants may identify more strongly with their shared deafhood than with their country of origin. Focusing on the context of medical education, Hans Vogt and Felicia Boma Lazaridou's chapter explores social cohesion and racism in German medical education and practice,

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1 Broadly defined as being *in need of* and formally *eligible to* welfare. Please see the chapter for the detailed discussion.

revealing how institutional racism at various levels influences exclusionary practices and semantics. Their analysis emphasizes the interplay of racialized patient treatment, the silence with respect to racism in medical education, and the everyday experiences of students and physicians, concluding that addressing these issues requires a holistic understanding of social cohesion in the context of racist social relations and the pursuit of transformative social change.

The final section is dedicated to collective action, both as topic and practice of research. Taking an intersectional approach, it traces the lived experiences of civil society and activist groups engaged in collective action, such as for climate justice or for just research. The section further discusses ideas for knowledge transfer and considers how research may learn from and co-generate diverse knowledges. Shirin Choudhary investigates the impact of climate change on the socio-economic position of women in Delhi, India, focusing on the intersection of gender with various forms of marginalization, such as caste, class, religion, informal work, and spatial marginalization in the city. This contribution reveals that women from marginalized backgrounds experience a lack of social cohesion, marked by diminished trust, sense of belonging, and participation in public life, and shows how such marginalization becomes exacerbated by institutional and systemic inequalities during climate-related crises. The chapter concludes by advocating for the inclusion of gender perspectives and women's voices in local climate action as a means to foster a more sustainable, climate-resilient, and socially cohesive Delhi.

Migration is the recurring theme in Ines Grau's contribution, which explores the impact of global migration and refugee movements on social diversity, emphasizing the potential for new forms of exclusion and social conflict. Focusing on German municipalities post-2015, the chapter discusses qualitative field research in Jena and Konstanz to analyze and critically reflect on local networks of refugee assistance. Considering the perspectives of refugees, Grau assesses the long-term dynamics of these networks and their potential for creating spaces of collective action and solidarity coalitions and highlights the precarious structural integrity of voluntary networks as practical expressions of solidarity within an unequal world. Finally, Tanja Gangarova considers research itself as a site of action. This chapter discusses Community-based Participatory Research (CBPR) as a research approach aimed at democratizing knowledge creation by increasing the involvement of historically marginalized communities, while acknowledging its susceptibility to perpetuating inequalities on the basis of existing power structures. Drawing from decolonization and participatory literature, the author reflects on CBPR's democratizing potential based on insights from research with communities affected by racial injustice in Germany. Gangarova suggests that a critical application of CBPR can address epistemic injustices within academic in-

stitutions and traditional research processes and advocates for the incorporation of decolonial learning into research methodology and practice to confront such issues.

Rounding off this anthology on intersectional challenges to social cohesion, Vivian Buchholz discusses how the research fields of intersectionality and social cohesion can mutually specify each other's terms and concepts. This chapter offers a conceptual lens for differentiating intersectional approaches by asking what it is that intersects. It further provides an overview of controversies in the current state of intersectionality research. After calling for greater awareness of the difference between identity and subjectivity, and community and society, the chapter argues that considering the intersectionality of ideologies might advance social cohesion research.

In conclusion, we hope this book will allow for nuanced discussions within different audiences about their own social positions and the social cohesiveness of their societies, and about how inclusivity is experienced by those with marginalized positions.

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Social Cohesion in Another Way: Calling Back Diversity and Minority Perspectives

Aydın Bayad, Elif Sandal-Önal, Meral Gezici Yalçın, N. Ekrem Düzen

Abstract

Despite the fact that it offers clarification, the available literature on social cohesion is crowded with conceptual confusion due to its position at the crossroads of scientific empiricism and political idealism. We intend to review empirically established components of social cohesion to scrutinize theoretical underpinnings of the concept in relation to diversity, focusing particularly on European societies where minorities struggle to have an influence in every facet of social and political life. Informed predominantly by social psychological accounts, we argue that the assumption of incompatibility between diversity and social cohesion is not well grounded, either theoretically or empirically. Rather, scientific efforts to maximize the coherence of operational definition of the concept exclude one crucial aspect of the phenomenon, namely *the social dimension* that corresponds to the multiplicity of perspectives in society. In our endeavor to critically review the operationalization of social cohesion, we highlight this social dimension of the concept and discuss pitfalls and dangers of available definitions relating to people, communities, and society in general.

Keywords: social cohesion; conceptualization; diversity; minority perspective; social psychology

"Under the current circumstances, it would be very risky to turn our backs on this concept [...] we must grasp it [...] critique it and push it to its fullest logical extent, show that it necessarily maintains strong links to the principles of equality and social justice." (Bernard 1999)

Social cohesion, a dressed-up notion akin to globalization, integration, or multiculturalism, has gained popularity on both sides of the Atlantic since the nineties. Originally a social psychological concept, it has drawn considerable scholarly attention, especially since the seventies, followed by a rise of extensive literature encompassing various disciplines and theoretical standpoints (Fonseca et al. 2018; Fredkin 2004; Hogg 1993). However, the term entered into the everyday vocabulary with a high-level conference organized by the OECD in 1996, where social investments were put forefront of the welfare states' agenda for economic restructuring. Therefore, the recent popularity of the term derives especially from social policy discussions and recommendations, as it is associated with neoliberalization (see Jansen 2010). Since then, a *political dimension* has been added to the term, eventually creating a bifurcation between macro- and micro-level conceptualization and analysis of social cohesion, which eventually grew into a *challenging puzzle* for researchers to solve (Chan et al. 2006; Fonseca et al. 2018; Friedkin 2004; Schiefer and van der Noll 2017).

Within this recently added *political dimension*, social cohesion represents an ideal state of affairs for democracies to pursue equality in the form of economic rights, social inclusion of disadvantaged groups, and protection of an open society with central tenets of multiculturality and diversity that are not always seen as compatible with cohesion. This line of argumentation assumes that socially cohesive institutions and societies would promote economic welfare (Berger-Schmitt 2002; Easterly et al. 2006) or else they would be at least a manifestation of the quality of life in a given society (Dragolov et al. 2013). Working on these assumptions, the commitment of political scientists and institutions to define and measure social cohesion as a macro-level phenomenon through observable characteristics arguably allows them to compare nation-states and societies (Jenson 2010). However, this has led to an inherent methodological nationalism in the literature (Wimmer and Glick Schiller 2002). On the other hand, the *social dimension* of the concept has a long history going back to small group research in psychology, whereby the *attraction* of a group constitutes the center of the analysis. Social psychologists have examined cohesiveness at the intersection of issues like conformity, solidarity, social integration, and belonging, and they have put forward theories like conversion theory (Moscovici 1980; Mugny 1982) and social identity theory (Tajfel and Turner 1979; Hogg 1993) in studying cohesion both as an intragroup phenomenon and as an intergroup phenomenon. Despite disagreements and disputes in the literature regarding the definition and measurement of the

concept (Hogg 1993), social psychologists generally assume a psychosocial *force* or *glue* that helps to bind members of a group, as well as distinguishable groups in society (Hewstone 2015; Zick and Rees 2020).

Notwithstanding the various sets of concepts developed by researchers throughout the last decades to reach a comprehensive understanding of the phenomenon, we believe that the tension between existing approaches (i.e., policy- versus psychology-driven) lay the ground for the puzzle of conceptualization, wherein the political dimension has gradually dominated the social dimension both in the theoretical development and the measurement of social cohesion.

1. Social Cohesion: A Norm or an Exception?

One of the early attempts to clarify this conceptual confusion was made by Berger- Schmitt (2002), who made the distinction between welfare distribution (i.e., *inequality*) and internal social coherence (i.e., *social capital*). Social capital encompasses common values, feelings of belonging, solidarity, and trust between people, as well as the institutions that constitute the internal coherence of a given society. Since this aspect risks creating a "strong cohesion within a community which itself is exclusive" (Berger-Schmitt 2002, 406), the welfare distribution aspect, which focuses on regional, populational, or class-based inequalities, creates a counterbalance. Based on a set of secondary data corresponding to this proposed conceptualization, Berger-Schmitt (2002) confidently concluded that social cohesion contributes to the quality of life both within and between European countries. Following the same rationale, but using a bigger dataset and variables, Dragolov et al. (2013) reconceptualized social cohesion by proposing that it is not only a part of the quality of life but a manifestation of it that would correlate with the material wealth of a given society. Dragolov et al. (2013) made a distinction between social (i.e., *relational)* and cognitive (i.e., *ideational)* dimensions of social cohesion, under which the authors cluster its indicators into three domains: social relation, connectedness, and focusing on the common good. In this way, the authors use both behavioral (e.g., civic participation) and perceptual indicators (e.g., respect for social rules and perception of fairness) as proxies for quality of life. Relying on this model, Dehley et al. (2018) concluded that social cohesion is the highest among wealthy societies both in Western and Eastern countries and correlates with life satisfaction. More specifically, Nordic countries like Denmark and Norway represent the most cohesive countries for the West, while postcolonial city-states like Hong Kong and Singapore represent the same for the East (see also Dehley and Dragolov 2016; Dobbernack 2014; Yevtukh and Kolesnichenko 2022).

Despite the efforts committed to arriving at a data-driven global consensus via the Social Cohesion Radar[1], this framework has been criticized from a theoretical point of view, since it "conflates the content with the causes of social cohesion" (Chan et al. 2006, 293). Seemingly, the inclusion of wealth or its proxies in the definition of social cohesion as a component leads to a problematic operationalization that is neither theoretically grounded nor empirically robust. In fact, despite measuring perception fairness, civic participation, and trust in the institution in their models, Dehley and colleagues (2018) were surprised to find out that more authoritarian regimes in Asia had higher levels of social cohesion. Thereby, for a better cross-cultural comparison, Jensen (2010) proposes to include not only *successes* such as wealth or its proxies but also the *gaps* such as poverty, unemployment, and income inequality, as well as institutional performance of a society in delivering social cohesion, such as the effectiveness of democracy, state, and market. Additionally, from a methodological point of view, the concept of social capital is problematic since it measures personal networks, which are mainly based on intragroup-level relation obtained from individual-level data (i.e., micro-level), while being used to infer country-level social cohesion (Chan et al. 2006; Fonseca et al. 2018; Jensen 2010; Putnam 2007; Letki 2008).

In light of these criticisms of the initial or, what we call, *maximalist* definition of social cohesion, Chan and colleagues (2006) proposed another operationalization that is more theoretically driven and methodologically advanced. Departing from Bernard's (2000) critique of social cohesion as a *quasi-concept*, Chan and colleagues (2006) carefully reviewed the literature and proposed a less abstract and value-laden concept for policy analysis and a more empirically testable operationalization for social scientists. Accordingly, social cohesion has to be investigated in an interpersonal realm, through a set of attitudes and norms which can be observed as behavioral manifestations rather than *characteristics* of nations or institutions, even though it involves state-citizenship relationships. In this new so-called *minimalist* framework, both explicit and implicit measures of quality of life are excluded, and instead of micro-level social networks (i.e., social capital), intergroup alliances and political participation are prioritized. However, this definition, too, relies on a distinction between psychology-driven versus policy-driven assumptions. For instance, Chan and colleagues (2006) cluster psychological variables such as trust and sense of belonging under the *subjective* component

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1 The explained framework pioneered by Regina Berger-Schmitt was further advanced by researchers like Klaus Boehnke, Jan Delhey and Georgi Dragolov. Funded by Bertelsmann Stiftung, their common efforts resulted in a large-scale data set combining eight established and international cross-sectional surveys. See https://www.socialcohesion.info/concepts/concept/bertelsmann-stiftung (last accessed on February 28, 2024).

of cohesion, despite the fact that these perceptions are not about a certain value or characteristic of society but are neutral terms, like citizens, public figures, and institutions. On the other hand, they cluster political variables such as civic and political participation in the *objective* component, even though those behaviors go beyond micro-level social networks (i.e., social capital) by focusing on membership, voluntarism, and alliances.

This new minimalist framework received considerable attention from scholars and inspired others to elaborate further on a testable structure and measurement for cohesion (e.g., Bollen and Hoyle 1990; Gijberts, van der Meer and Dagevos 2012). For instance, Dickes and colleagues (2010) examined the minimalist definition of social cohesion with a construct validation study based on European Value Survey items corresponding to indicators of social cohesion. Relying on a data set covering 33 countries, they showed that behavioral manifestations of cohesion—what they called the *substantial* character of relations—are distinguishable from attitudinal manifestations—what they called the *formal* character of relations—and this distinction allows for a better cross-cultural comparison. Similarly, Schaeffer (2014) focuses on trust-related sentiments to measure the *cognitive* component of cohesion, and on people's engagements in public and political life as the *behavioral* component of cohesion.

The minimalist framework of social cohesion represents a methodological advancement by excluding the economic realm from the operationalization, yet the conclusion derived from cross-cultural comparison does not differ considerably from the earlier maximalist conclusion. For instance, Dickes and colleagues' (2010) findings show that participants from Nordic countries like Sweden and Denmark perform better both in *substantial* and *formal* components of social cohesion, followed by their West European and South European counterparts, in that order. Meanwhile, participants from former Soviet countries like Ukraine and Russia show the lowest level of social cohesion in both components, followed by those from Eastern Europe. At first sight, this might be seen as a confirmation of social cohesion being a manifestation of the quality-of-life assumption. On the other hand, however, the combined results of these two frameworks (i.e., maximalist and minimalist) suggest that social cohesion is an exception rather than a global phenomenon of keeping people together. Or, to put it in Berger-Schmitt's (2002) terminology, a *non-exclusive* cohesion is so costly that only Nordic countries, characterized by small and relatively homogeneous populations, can afford it. One can also see the exceptionality of Nordic countries in terms of social transformation and the value changes accompanying their economic enhancement (Inglehart and Baker 2000). If this is true, Nordic countries' difficult-to-reach level of social cohesion will make sense only if western modernization is framed as the one-way-out or as the *universal*.

However, according to Green, Janmaat and Han (2009), universalistic perspectives are normative and exclusive regarding the multiplicity of cohesiveness in time and space. In a comprehensive critical review of the literature, they decode the universalistic perspective on social cohesion and argue that the social cohesion *regime* that Nordic countries represent constitutes only one version of cohesiveness, namely, the social democratic regime of social cohesion, which is based on a Marxist interpretation of social solidarity and necessitates a cross-class egalitarianism. Contrary to being universal, the emergence of this regime is closely connected to the peculiar socio-political history of Nordic countries that benefited from the absence of aristocratic lands, weak bourgeoisie, and relatively homogeneous culture. On the other hand, neither other European nor American societies can be considered within a social democratic regime of social cohesion since both regions have totally different social characteristics and ideological foundations (see Green and Janmaat 2011). Such a particularistic view was further developed and tested in comparison to universalistic assumptions in a bigger sample throughout three waves of the World Value Survey. Relying on a comprehensive definition and set of indicators consisting of behavioral, attitudinal, and institutional measures, Janmaat (2011) confirmed the universalistic assumption by showing a global pattern of association between social cohesion and socio-economic development. More importantly, however, he also showed that the dichotomy of policy- versus psychology-driven components in the literature covaries neither nationally nor globally except in Nordic countries. In other words, civic and political participation, assumed to be the behavioral manifestation of social cohesion, is not a function of interpersonal and/or intergroup trust in the majority of the world. According to, Janmaat (2011) the social-democratic regime of social cohesion represented by Nordic countries "cannot be adopted by other countries or only with great difficulty" (page 80).

From this brief review, it is clear that the mainstream frameworks for social cohesion treat it as a universalistic ideal that is not only incompatible with the real-life phenomenon but also exceptional and difficult to reach for many societies. More importantly, in the search for a universalistic concept, the available models are reductionist in the sense that the psychology-driven dimension of social cohesion is mostly related to the intragroup level of cohesiveness, disregarding the difference between various social groups of the same country. This is also evident from the methodological nationalism in these studies, which rely only on nation-state data. Following from this, we argue that focusing on intragroup rather than intergroup cohesion is problematic because this approach tends to view diversity as a hindrance to trust and solidarity within and between communities (Putnam 2007). In the next section, we will delve into this debate and argue

for the place of diversity and minority perspectives in cohesiveness from a social-psychological standpoint.

2. Social Cohesion and Diversity: A Challenge or Chance?

The relationship between cohesion and diversity came to the forefront of scholarly debates in the early noughties thanks to the 'constrict theory', more specifically, the concept of social capital postulated by Robert Putnam (Ariely 2013; van der Meer and Tolsma 2014). Accordingly, a high level of diversity in a neighborhood triggers social isolation and anomie, which is people's tendency to distance themselves from both in- and out-group members. In other words, they "hunker down—that is, to pull in like a turtle" (Putnam 2007, 147). Although empirical data provided to confirm the constrict theory was from the USA, researchers from the UK, Canada, and Europe supported the claim of social capital as being equivalent to social cohesion and threatened by ethnocultural diversity (see Dehley and Newton 2004; Laurence 2011). Aside from the claims and empirical findings of this line of research, the timing of these claims requires special attention since this conceptual shift in the literature was accompanied by some political developments, as was the case with its popularization.

Jenson (2010) specifically draws attention to a revision made in the Council of Europe's 2004 strategy for Social Cohesion, which represents a milestone in the literature equating cohesion with the concept of social capital (see Hawes and Rocha 2011; Hero 2007). Around the same time, following civil disturbances in the UK (Hulse and Stone 2007) and Islamic fundamentalism in Germany (Hiscott 2005), *too much* diversity or *radical* cultural relativism, associated with ethnic cleavages or isolationism, was being seen as a threat to national unity and social cohesion. According to Reitz (2009), this generalized fear of diversity as being a threat to social cohesion is reiterated by many researchers from different disciplines. It found its echo even in Canada, such that multiculturalism started to be questioned, giving way to an era of "the retreat from multiculturalism" (page 7). Since then, however, many researchers have challenged the hunker-down assumption and provided compelling evidence against it, which is still growing (Ariely 2014; Kesler and Bloemraad 2010; Letki 2008; Savelkoul et al. 2011; Zetter et al. 2006).

One of the first reactions to the hunker-down assumption was to find confounding and contextual variables to explain the negative relationship between diversity and social capital. For instance, Letki (2008) found that it was not the quality of social networks, but their quantity that was at risk of decreasing due to diversity, albeit only in economically disadvantaged neighborhoods in the UK.

Similarly, this time with a cross-cultural dataset, Kesler and Bloemraad (2010) showed that income equality and multiculturalist policies eliminate the negative effect of diversity on social capital in democratic countries. In other words, national policies and institutional precautions positively influence micro-level personal networks. Moreover, with the help of intergroup contact mediation, diversity might even increase informal social meetings and solidarity among communities in Europe (Savelkoul et al. 2011). Further still, when researchers started to use alternative operationalization of social cohesion, rather than solely focus on social capital, the hunker-down claim was totally rejected (Ariely 2014). Taking conceptual confusion and measurement differences in the literature into account, van der Meer and Tolsma (2014) examined all 90 studies across the globe dealing with constrict theory, to compare their findings concerning different dimensions of social cohesion. Accordingly, the hunker-down effect of diversity has been supported only in USA-based datasets, it has mainly attitudinal—rather than behavioral—outcomes, and it is predominantly evident in micro-level interactions (i.e., intra-neighborhood). This means—and only under exceptional conditions—diversity might decrease trust and willingness to contact strangers in the neighborhood, but this "does not spill over to other forms of social cohesion" (van der Meer and Tolsma 2014, 471). All these studies successfully show that ethnocultural diversity has a very restricted and small negative effect, if any, on social capital, corresponding only to one aspect of social cohesion.

More importantly, the empirical evidence reminds us how exclusive and fragile normative definitions of social cohesion can be. Thus, one might ask whether we need social capital or intra-neighborhood cohesion to achieve a cohesive society. So far, we have learned that the socioeconomic development of a society is associated with both cognitive and behavioral components of cohesion, no matter how they are measured (Dehley et al. 2018; Dickes et al. 2010; Janmaat 2011). We have also gathered enough evidence of the *exceptionality* of Nordic countries in managing to bring together those cognitive and behavioral aspects, namely, trust and participation. From the most maximalist to the most minimalist frameworks, this is the case for different operationalizations and definitions. Another critical observation here is that although cognitive and behavioral components of social cohesion correlate with socioeconomic development globally, they are not always correlated with each other (see Janmaat 2011). If the actual social cohesion corresponds to a difficult-to-reach ideal for the rest of the world, what can we conclude about non-Nordic countries? Are they less cohesive? Are they more divided? To put it differently, what is the opposite of being a cohesive society?

According to Zapata-Barrero (2021), a *threatening hypothesis* is hiding behind most of the available answers to these questions. The revival of the social cohesion concept both in political and academic milieus has correlated with the in-

creased need for *resilience* to uncertain and challenging socioeconomic develop-
ments where nation-state's capacity to intervene was limited due to neoliberal-
ization (Jenson 2010). In addition, the initial political concerns and expectations
behind the concept lead to a structural problem, namely, that cohesiveness gets
discussed under an assumption of *homogeneity* engineered to an exclusively na-
tional scale of cohesion-building (Zapata-Barrero 2021). For instance, through-
out the literature, the variables representing a psychological component of social
cohesion, such as generalized trust or feelings of belonging, are instrumental-
ized to satisfy the *threat of heterogeneity* according to which the condition for a per-
son/group's inclusion in society does not violate the unity of the *nation* (see Dob-
bernack 2014). Lægaard (2010) defines this as the *standard view* of social cohesion
and argues that this moralizes social cohesion to prioritize citizenship and re-
strict naturalization of immigrants and participation of denizens in the political
realm. Another crucial feature of this standard view is its methodological nation-
alism: the majority of the studies use nation-states or citizens as the analytical
unit, despite the fact that social cohesion is mostly formulated either on a meso-
level (e.g., neighborhood) or macro-level (e.g., society), where citizenship or na-
tionality is not always relevant for social encounter. Methodological nationalism
appears in disguise within migration studies, which take for granted the bound-
aries of nation-states, and constrain the measure and analysis of social dynam-
ics within and cross nation-state borders. This treats the interrelated predictors
of social cohesion (e.g., trust or belonging) as being delimited by both the politi-
cal and the imagined boundaries of the nation-state, ignoring both transnational
influences and the idiosyncratic dynamics of minorities. These two *foundations*
–the threatening hypothesis and methodological nationalism– hidden beneath
the standard conceptualization of social cohesion restrict the concept to a nation-
state level of harmony that excludes contemporary heterogeneities produced by
the globalization of people, cultures, and values.

It is clear from the standard viewpoint of cohesion that the opposite of cohe-
siveness is a threatening polarization that drives people apart (Dobbernack 2014).
For instance, a survey from Germany has been frequently cited in the literature to
refer to such fear of polarization, because it reported a strong agreement from
respondents with the statement, *society is becoming increasingly fragmented*. Yet, the
authors of the original study report another aspect of this representative survey:
"[those] who rejected diversity also saw the cohesion of society as under threat"
(Zick and Rees 2020, 138). Therefore, by drawing on scholars who relate cohesion
with conflict, we argue that the problem with the standard view of cohesion is
two-fold; (1) the fear of diversity is more dangerous than diversity per se, and (2)
social cohesion cannot be reduced to psychology-driven variables.

To expound on our argument, we propose to go deeper into the theoretical grounds of the concept. In his famous critique, which has inspired many researchers to conceptualize social cohesion better, Paul Bernard (1999) established a *dialectic* philosophical ground built upon three pillars of democracy: Liberty, Freedom, and Solidarity. A cohesive social order necessitates all three of these pillars to sustain their dynamic and conflictual relationship. Inevitably, diversity in its broadest sense, including but not limited to cultural, generational, sexual, or regional characteristics, is an unavoidable contemporary reality that acts as fuel for the dynamism of this democratic dialectic. According to Bernard (1999), the highlighting or prioritization of the pillar of solidarity to manage diversity through a common symbol like national identity "can compromise the undertaking [of social cohesion] as easily as contribute to it" (page 14). This applies to the current standard view of social cohesion. Instead of a false conception of solidarity enforced through national identity, common values, or generalized trust, aimed at keeping lay people accountable and responsible, societies need more institutions with the ability to manage social conflicts, in order to keep democratic space dynamic and dialectic. As it differs from group cohesion, *social* cohesion is about the conflict over identities, values, and resources (Zick and Rees 2020). Therefore, the standard view of social cohesion departing from a fear from contemporary reality, namely diversity or fragmentation, can be seen as an appeal to hunker-down, that is, restricting access to democracy and wealth only those shared same norms (for a further discussion see Lægaard 2010).

The other problem with the standard view of social cohesion is the methodological reductionism frequently exercised to reach an empirical and testable operationalization (Zick and Rees 2020). Undoubtedly, the endeavor is to find an accurate path to clarify our understanding with rigorous scientific standards, and to develop workable tools for further research and discussion. However, social cohesion is not solely determined by the behaviors and attitudes of individuals, even if this might seem a convincing way to compare societies under a universalistic operationalization (see Chan et al. 2006). Instead, many researchers show that formal and informal relationships, institutions, and discourses are also at play when it comes to the definition of social cohesion, and that these, in turn, influence individual attitudes and behaviors (Delhey et al. 2018; Janmaat 2011; Kesler and Bloemraad 2010; Zick and Rees 2020). We have already mentioned the overemphasis on the solidarity principle, which is mostly represented by psychology-driven sets of variables, namely *cognitive*, *substantial*, *subjective*, *ideational*, and *social capital*. Yet we believe another reductionism occurs when political scientists incorporate *psychological* variables into a broader constellation of multidimensional operationalizations; this is the case, especially, for feelings of belonging. For instance, most of the works reviewed here admit the danger of *strong* cohesiveness,

which implies a tendency towards homogeneity, or the dominance of a majority over others, and yet they nonetheless mostly use national identification as an overarching measure of belonging. At first sight, such simplification can be seen as justifiable due to the fact that most of the operationalization combines belonging with the policy-driven dimension of social cohesion, which is primarily represented by relatively progressive and inclusive variables, namely, *behavioral*, *formal*, *objective*, *relational* and *inequality*. However, we believe this formula of counterbalancing national identity measures with variables related to civic and political participation is not solving the problem of exclusion inherited from the concept of the nation or the dominant group identity. Consideration of the *social* in social cohesion concept as a nationally-framed, homogeneous entity will cause cohesion to fall into the trap of methodological nationalism, by assuming every actor to be a natural member of this national community, and thus closing down the social and psychological dynamics of social cohesion within the nation-state geographical boundaries.

One way of understanding social cohesion and the problems inherent in its various definitions requires reading the concept in reverse, especially in an era in which societies are becoming more diverse due to increased migration flows, along with intensified negative attitudes towards the *other* or the *minority*, the latter due to rising populism, the strengthening of right-wing ideologies, and their promises to create homogeneous nations. When we detach social cohesion from homogenization and see diversity as the *sine qua non* of this concept, we can understand that fragmentation is not the opposite of cohesion. Rather, socially inherited inequalities, and the related intractable conflicts between social groups, resulting from othering, fuel an atmosphere that is the exact opposite of cohesion, namely, polarization. According to Schaffer (2013), the problematic conceptualization of the indices in the available models of social cohesion involve disregarding the perspectives of diverse populations on certain dynamics. Besides, the acceptable level of dissent within a society turns out to be toxic for different milieus when characterized with affective polarization (Moore-Berg et al. 2020). Ideologically driven polarization between social groups over a set of values or beliefs decreases social cohesion since it involves a lack of trust and of willingness to cooperate (Chan 2022). Understanding social cohesion lies in challenging polarization while considering the perspectives of disadvantaged minorities, who are mostly the targets of the toxic outcomes of polarization.

3. Diversity of Cohesions: The Potential of Minority Perspectives

At this point, it might be beneficial to revisit works in psychology on group cohesiveness to be able to call for an alternative to the standard view of social cohesion in the literature. In social psychology, the first appearance of the concept of *cohesiveness* goes back to the fifties, and it defines the force of *attraction* that holds a group together. Together with other traditional approaches to group formation, this basic idea of interpersonal attraction is that it determines liking, cooperation, success, etc., in small groups. This idea was eventually consolidated in the Social Cohesion Model in social psychology (Abrams and Hogg 1998; Hogg 1987). For many years, psychologists have focused on small groups like teams, friendships, and organizations to understand the psychological mechanisms that relate to outcomes of cohesiveness. Later, Evan and Jarvis (1986) suggested *identification* as the underlying mechanism of interpersonal attraction, and this has been widely accepted for assessing the magnitude of cohesiveness. However, it was the "Social Identity Theory" (SIT) that allowed psychologists to study big groups in terms of nationality or ethnicity via the *social attraction* concept (Hogg 1993). According to this model, membership to a particular social group (i.e., identification) has a normative effect on one's positive attitudes and feelings (i.e., attraction) toward a prototypical group member. In this way, the social attraction of a social group leads to depersonalization, which results in the processing of perceptions, emotions, and behaviors predominantly at the intergroup level. For instance, national identity is a function of intragroup attraction within a nation, and this has been shown to peak in contexts of intergroup hostility, such as international conflicts (Stein 1976). Therefore, in the tradition of psychology, cohesiveness has mostly been examined in relation to ethnocentrism, conformity, and intergroup conflict, in order to understand the *strong* or dangerous side of social cohesion (Hogg 1993).

Moreover, the contemporary understanding of social cohesion as an intergroup phenomenon is intrinsically influenced by power inequalities and hierarchies that are embedded in the socio-political context (Zick and Rees 2020). Therefore, an exclusionary national identity might be seen as precisely the source of dispute and conflict that hinders the very idea of social cohesion. During the last three decades, many psychologists adopting SIT have searched for a way to challenge this social attraction to a superordinate common identity, in favor of a more inclusive model than national and ethnic identities, when the rights and safety of minorities and immigrants are at stake (Gaertner et al. 1993; González and Brown 2003; Benet-Martínez and Harritos 2005). For example, according to the Common Ingroup Identity Model (Gaertner and Dovidio 2000), if a superordinate identity is made salient, the lower order identity (e.g., national or ethnic

category) will be psychologically suppressed and former outgroup members will become part of the ingroup (Gaertner, Mann, Murrell and Dovidio 1989; Gaertner et al. 1993). Following this line of reasoning, Vollhardt and colleagues (2009) suggest fostering a superordinate identity representing the minimum ground for peaceful coexistence, as the means for achieving social cohesion in societies enveloping diverse populations, including minorities, migrants, and otherwise dominated, marginalized or silenced groups. Unfortunately, this idea of a super-ordinate identity that goes beyond the dominant group identity or nation, and potentially facilitates and promotes social cohesion, remains mostly a theoretical argument. Besides, as a top-down solution, its success would predominantly depend on political context or public support (Simon and Klandermans 2001).

On the other hand, a great deal of psychological research on conformity shows that there is another possibility to accomplish social change in a bottom-up manner, namely, minority influence (Moscovici 1976; Mugny 1982). According to this perspective, against the conformity of majorities who mostly use *normative* channels such as reward, punishment, sanctions and surveillance, minorities have the capacity to re-create conformity via *informational* influence, that is, to provide an alternative and resolutely *truthful* version of reality. Thus, instead of relying on the standard view of social cohesion, which goes hand in hand with quality of life, economic wealth and national belonging, producing a *quasi-harmony*, we need alternative visions and realities from various strata of society—including but not limited to marginalized groups. And it is from their intersections that we need to be able to hold on to conflict within the democratic dialectic, to keep social cohesion dynamic, and to keep society just. We believe this is what we are currently lacking when it comes to social cohesion literature. Despite the immense volume of social cohesion literature as a source of dispute on the diversity-cohesion nexus the perspectives of the minorities who constitute the diversity within a given society are, to our knowledge, largely absent from the discussion (for some exceptions, see Cheong et al. 2007; Medda-Windschier 2017). We believe that taking minority perspectives into consideration when theorizing social cohesion, as well as in relevant policy-making practices, would make two crucial changes possible. First, it will emancipate the concept from the restricted frameworks of homogenized and exclusionary national identification, and enable inclusive categories to be constituted through multivocal, plural processes. Secondly, keeping the inter-group approaches alive in social cohesion debates would enable us to define the opposite dynamic of social cohesion and nourish the debates about its theoretical and methodological aspects. Chan (2022) mentions affective polarization as the contrasting dynamic to social cohesion and argues that the lack of trust and willingness to cooperate are the key drivers of hostility toward others, which makes bridging, bonding, participation, and belonging the essences of social cohesion.

Without considering minorities, these concepts would be arrived at in vain in societies.

4. Concluding Remarks

Research on social cohesion is still facing a number of theoretical shortcomings in its efforts to arrive at a comprehensive understanding of the concept. When we take into account the difficulty of approaching the subject matter with a suitable methodology, it becomes clearer still that it is the choice of category used to characterize social cohesion, rather than the scale or level at which it is applied, that creates most problems. In concrete terms, by choice of category, we are referring to the fact that taking either only the political or only the psychological dimension of cohesiveness as the point of departure usually ends up excluding the other aspect, at best, and confounding our understanding of both aspects, at worst. However, as reductionist as it might seem, we argue that neither category provides a full potential to examine or understand social cohesion.

Moreover, there seems to be no straightforward conjecture that could be generated simply by suggesting an amalgamation of both categories. This is because such a merge would not sufficiently take into consideration elements missing from both political and psychological approaches. In other words, approaches foregrounding the political dimension of social cohesion may have defined a working model of social cohesion that is only applicable to societies where measured variables already indicate a relatively homogeneous lifeworld of the population, thanks to the social and economic achievements historically shared and experienced at a national level, as is the case with the Nordic exception. Approaches highlighting the psychological dimension, meanwhile, may have merely sought unity, rather than cohesion, around a set of emotionally laden values that are supposed to hold the society together, such as social capital.

In light of this, we propose to take the minority perspective into account, in order to make sense of both approaches and what is still lacking from a possible combination of them. This would enable researchers to arrive at a comprehensive definition and, for that matter, measurement of social cohesion. Indeed, minority perspectives are necessary for explaining social cohesion not only retrospectively but also prospectively, especially given the fact that transnationalism is the defining feature of our era and minorities compose a significant percentage of total populations within national or regional borders, starting from the so-called developed countries, and at an accelerated rate. Neither the distribution of wealth (i.e., political dimension) nor societal values (i.e., psychological dimension) are in favor of minorities in any given country. How minority perspectives could be

incorporated into studies of social cohesion presents a challenge. Still, it is a valuable effort to contextualize social cohesion through the lenses of diverse groups and communities for each regional, cultural, or national context. Because if social cohesion is in any sense related to peaceful coexistence and solidarity, being present for the other regardless of entitlement, then it should be reflected in the research agenda.

Acknowledgment

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(Unchosen) Cohabitation and More-Than-Human Intersectional Proximities[1]

Amani Ashour, Janet-Lynn Holz

Abstract

In Germany and many other (Western) societies, social cohesion has come to be seen as brittle or in decline. According to El-Mafaalani (2021), this is partly due to gains in social equality that have resulted in grievances among some parts of society, these can be exploited by anti-democratic leaders, contributing to the global phenomenon of democratic backsliding (Carothers and Press 2022). In this context, Hark (2021) has proposed the notion of cohabitation to ponder how both democracy and universal care may potentially pose a new basis for social cohesion. In this article, we argue that intersectionality is important, and our proposed concept of intersectional proximities uniquely instrumental for thinking about cohabitation, but also solidarity and allyship. We introduce a variety of examples taken from Human Animal Studies as well as the Israeli solidarity with Palestinians, that show how proximity between groups or individuals, who are differently positioned in structures of discrimination influences how each other is affected by those structures – sometimes by transferring certain aspects, images and discrimination – and experiences these effects.

Keywords: intersectionality, mutual constitution, intersectional proximities, cohabitation, Sabine Hark

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1 This article was written before the 7ᵗʰ of October 2023. The content did not change since then and the article is not intended to be a contribution to the discussion of the happenings of the 7ᵗʰ of October 2023 and beyond. The authors are differently involved and positioned in the discussion of Israel-Palestine.

In Germany as well as many (Western) societies, social cohesion has come to be seen as brittle or in decline. According to El-Mafaalani (2021)[2], this is not in spite of the general trend of increasing social equality but *because* of it, since along with, for instance, racism the former basis of the "old" ("toxic") social cohesion, one where even those oppressed subordinated themselves to the oppressive social conditions, collapses as well. According to the "integration paradox" (El-Mafaalani 2020 [2018]) there is a connection between growing equality and backlashes to it: the more members of a given minority are seen to be moving outside of their prescribed social 'place,' the more, that is, they are indeed well integrated and self-confidently participating in society, the more backlash they will receive and the more social conflicts around their integration will intensify. These grievances can then be exploited by anti-democratic leaders, further fueling the growing global phenomenon of democratic backsliding (Carothers and Press 2022).

While this perceived threat to social cohesion may not be new nor justified, it should be taken seriously. Inclusive societies, El-Mafaalani points out, tend to be weak in terms of social cohesion: "The development of new forms of social cohesion that could fill these gaps is a huge challenge." (2020 [2018], 271) In *The Care Manifesto*, The Care Collective maps out a "politics of interdependence" based on the recognition that "our survival and our thriving are everywhere and always contingent on others." (2020, 30) With the aim of building a "caring world" (ibid., 94), care is dissociated from its limitation to intimate relationships and instead defined as "our individual and common ability to provide the political, social, material, and emotional conditions that allow the vast majority of people and living creatures on this planet to thrive – along with the planet itself." (ibid., 6) This understanding of care has the potential to become universal by sharing "care's multiple joys and burdens" across "the whole of society" (ibid., 19), while also making sure that it is extended to all "others, proximate and distant" (ibid., 28), whether human or not (ibid., 40).[3] According to Sabine Hark (2021), it is precisely this sort of universal care that is needed to "repair" the world (ibid., 221). Hark therefore proposes universal care as a new basis for a truly inclusive social cohesion. In their theory of cohabitation, care should encompass all living and even future beings on this planet which explicitly also includes—and this is the crux of the idea of cohabitation as well as democracy—all those others with whom we did not choose to share our world, most distinctly represented in those we perceive to be our enemies.

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2 All translations from German-language sources are by the authors.
3 For a further elaboration of care ethics and theory, see Tronto (1993).

In our contribution to this volume, we want to address the question whether and how intersectionality may help us better understand the idea of cohabitation. Since Crenshaw (1989; 1991) coined the term intersectionality in the 1980s, this concept (and its metaphor of the crossroads) has become commonplace in the social sciences and activist contexts internationally. Despite its ubiquitous nature, however, key concepts and empirical implementations remain a topic of controversial debate up to this day. One strand of discussion is concerned with the question of how the different structures of discrimination and corresponding liberation struggles are connected and interact with one another. In this vein, we want to elaborate and illustrate Jorba and Rodó-Zárate's (2019) idea of the "properties framework" in intersectional theory.

We first introduce the idea of cohabitation, focusing for brevity on Hark's reading. We then trace the history of intersectional theory and show how intersectionality as a concept can help to theorize connections between different struggles for a more egalitarian and livable future. We argue that the properties framework outlined by Jorba and Rodó-Zárate (2019) is useful in thinking about how different structures of discrimination make up a whole. Furthermore, we agree with McKinzie and Richards' (2019) proposal for a "context-driven intersectionality," while understanding proximity as a special form of context in intersectional analysis. We explicitly elaborate how, in a shared world, even those not targeted by a given structure of discrimination can still experience its effects by proximity, and why, for this reason, liberation struggles must be thought together. In a third step, we will therefore illustrate what we come to call intersectional proximities, with examples derived mainly from Human-Animal Studies, but also from the Israeli solidarity for Palestinians[4]. Lastly, we conclude with a discussion of how intersectional analysis is indispensable (and the context of proximity uniquely helpful) for thinking about cohabitation.

1. Cohabitation: The *Unchosen* and the Project of World-Sharing

In the epilogue to *Eichmann in Jerusalem*, Hannah Arendt closes by arguing for, and finally even directly addressing Eichmann with, a fictional ruling, explaining why, in her eyes, his death penalty is justified. Trying to decide, as the Nazis did, who is allowed to live on earth by genocide, and thus forcefully enacting their unwillingness to share the world with Jews, constituted, in Arendt's words, a "new crime,

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4 The examples are by no means exhaustive and could be extended to include examples from other fields of discrimination. As they stand, they reflect the past, current, and future research interests of the first author.

the crime against humanity [...] an attack upon human diversity as such [...] perpetrated upon the body of the Jewish people" (2022 [1963], 267–268). Arendt's fictional judge thus concludes:

"And just as you [Eichmann] supported and carried out a policy of not wanting to share the earth with the Jewish people and the people of a number of other nations – as though you and your superiors had any right to determine who should and who should not inhabit the world – we find that no one, that is, no member of the human race, can be expected to want to share the earth with you. That is the reason, and the only reason, you must hang." (ibid., 278)

This argument about the world being diverse, a diversity into which everyone is born equally unchosen, culminates in the figure of the *Unchosen* and the condition of having no right to choose with whom to share the world. In their re-reading of Arendt, all three assumptions have been picked up by Judith Butler (2014 [2012]; 2018 [2015]), and through them by Sabine Hark (2021), and turned into the pivotal point around which their ethic, respectively ethos, of cohabitation is built.[5] Hark writes: "I don't understand the Unchosen [...] as a clear-cut social group or category. They are also not the new revolutionary subject, the new name of the excluded multitude, the many and wretched of this earth, who once more are to be fixed at the margin of the human." (ibid., 133) Rather, being unchosen is a circumstance we all have in common, which is also why there can be nobody who has a right to choose. The burden of this role, however, has been given solely to history's diverse "others" (ibid.). What we therefore must do, according to the idea of cohabitation, is learn to share the world with *all* others, even those we would not choose if we had a choice (ibid., 185).

But this choice, which we are not supposed to have, is sociologically speaking a choice we make every day. Hark therefore qualifies the choice as legitimate in private but not in the public domain. Not being able to choose, thus, "does not mean we are not allowed to choose whom we share our lives with. Who takes a seat at my private table is not a question of public deliberation." (ibid., 188) What Hark is vehemently arguing against are those "enemies of democracy" whose explicit goal is "to make world smaller, to destroy world" (ibid., 62) by trying, through threats and acts of violence[6] and by drawing a distinction between those deemed chosen

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5 Whereas Butler seeks an argument for the equal grievability of all life which should have the same chance to flourish, while more specifically also trying to rehabilitate a Jewish critique of Israeli politics vis-à-vis the Palestinians, Hark's motif for elaborating the idea of cohabitation largely responds to the international autocratic and anti-democratic shift. For our purposes in this article, we mainly focus on Hark's ethos of cohabitation. A more detailed discussion of cohabitation in Arendt's and Butler's respective work can be found in the essays of Thürmer-Rohr (2019).

6 Hark does not limit this world-destroying violence to genocide, but also includes all forms that "constitute an attack on the indivisible right 'to be at home in the world'" (2021, 62), which explicitly also encompasses epistemic, i.e. silencing, forms of violence.

and unchosen, to establish a societal homogeneity that can only ever be realized by violent means. Hark thereby pores over one of the most difficult questions of democracy, which is made ever more urgent given the international autocratic and anti-democratic shift: how to treat—yes, even how to share the world with—those enemies, who might even want to destroy the world that allows oneself to breathe.[7] In the terms of social division and polarization, this problem also concerns social cohesion. The ultimate goal Hark envisions in their ethos of cohabitation is a world designed to ensure the flourishing of *all* life, while adhering to two fundamental principles: "Our associations must not be built on the suffering of others and they have to be designed in a way that allows everybody without exception to live a life free from coercion and violence in the company of others." (ibid., 186) While Hark's *Community of the Unchosen* does not offer a blueprint for this inclusive world, it does argue for universal care to take a central role in the process of world-healing and world-building. In the next section, we briefly trace the history of intersectionality, before introducing the properties framework by Jorba and Rodó-Zárate (2019) in order to lay the theoretical foundation from which a variety of examples of intersectional proximities can be elaborated.

2. A Short History of Intersectional Theory

The concept of intersectionality has its origin in the Black Women Movement and illustrates the effects of the intersection of different forms of discrimination such as racism and sexism. It aims to make visible interweaving experiences caused by structures of oppression (or privilege) and emphasizes the connectedness between liberation struggles (Crenshaw 1989; McKinzie and Richards 2019).

The concept of intersectionality is used as a theoretical approach and as a political issue (Crenshaw 1989, 166 f.). Crenshaw uses intersecting streets to illustrate her concept of intersectionality: While each of the roads symbolizes a different form of oppression, e.g. racism or sexism, the traffic—that is to say the intersectional discrimination—can hit from different directions at the same time. Therefore, it is difficult or near impossible to single out which form of oppression caused the discrimination (ibid.,149). On the basis of three court cases about the discrimination of Black women at their workplace, Crenshaw illustrates how the

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7 The question of sharing the world with those who are my enemies is surely most difficult in relationships of ongoing and recent oppression, violence, and harm suffered. In this article we are not able to elaborate more on this special (asymmetric) case, but we do believe that the fundamental idea of cohabitation still holds: to have to come to terms with the fact that the world, not necessarily one's own private life, is and will continue to be shared by others who have an equal right to a livable life.

court fails to consider the concern of the plaintiffs in an adequate way. This outcome is due to a separate understanding of racism and sexism by the court. In the image of the crossroads, they fail to consider the intersection: "Because the intersectional experience is greater than the sum of racism and sexism, any analysis that does not take intersectionality into account cannot sufficiently address the particular manner in which Black women are subordinated" (ibid.,140). This example shows further that neither (white) feminist theories nor antiracist politics on their own adequately address the experiences of Black women. The concept of intersectionality is therefore a renunciation of additive models of discrimination.

Crenshaw was not the first who emphasized these interweaving dynamics. About 100 years earlier, the abolitionist and women's rights activist Sojourner Truth delivered her famous speech *Ain't I a Woman?*[8] at the Women's Rights Convention in Ohio in 1851. In this speech, Truth rejects the essentialist assumption of women's supposed weakness in contrast to the alleged strength of men (Truth 2020; cf. Crenshaw 1989). Highlighting her experiences under slavery, she distances herself from the myths of femininity, and in a broader sense from the allegation that women incapable of the responsibility demanded by political activity. Like the court cases presented by Crenshaw to illustrate intersectionality, Sojourner Truth's speech indicates that feminist or antiracist struggles fall short insofar as they fail to address the specific experiences of Black women. Another important understanding of intersectional perspectives before the actual coining of the term was introduced by the Combahee River Collective in the 1970s, a Black lesbian women activist group. The Combahee River Collective described a perspective on the systems of oppression that constituted their daily experiences as interlocking, their interactions manifested, amongst others, in specific forms of homophobia, sexism and racism (Combahee River Collective 1977).

In German anti-discrimination discourse, many terms and sometimes ideas are imported from the United States, while early steps towards intersectional understandings of oppression and liberation struggles in Germany itself tend to be forgotten. Apart from these prominent milestones in the American history of intersectionality, Mayrl (2020) thus offers a German perspective, pointing out that, while distinct from intersectionality, there are a few examples from Germany for a theory of interdependence that would highlight the interconnectedness of social categories and their effects on individuals. With this aim, Mayrl outlines a brief history of the political ambitions of feminist activism, depicting the struggles of Jewish, Black, and migrant women in Germany. One significant feminist

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8 Sojourner Truth was not able to read or write. The written version of the speech in circulation today is based on a textualization a few years later, written by the abolitionist and women's rights activist Frances Gage.

group, the *Schabbeskreis* of the 1980s serves as an important example. This group analyzed the links between antisemitism and myths of motherhood in the post-Nazi period. However, the collective came to be seen almost singularly in terms of its stance towards the Israeli politics and came to a standstill (ibid., 60). In addition to this, Traußneck (2023, 106) proposes that some political groups in Germany can be retrospectively described as intersectional.[9] According to Traußneck, the Schabbeskreis is one such example of a feminist political group in Germany that broadly discussed the question of difference and which can therefore be seen as an early German example of intersectionality (ibid., 113, 105).

We now turn to the properties framework put forward by Jorba and Rodó-Zárate (2019). The properties framework is useful in laying a theoretical basis grounded in intersectional analysis for the understanding of how everybody is indeed inhabiting the same structures of discrimination and privilege that make up the world.

2.1 The Properties Framework and Context-Driven Intersectionality

According to Jorba and Rodó-Zárate (2019), the concept of mutual constitution[10] denotes a paradigm of intersectionality which describes its intersecting categories as constitutive of one another. There are many definitions and critiques (cf. Ken and Helmuth 2021) of mutual constitution, which leads to an inconsistent application of the concept. In addition, Jorba and Rodó-Zárate highlight that some of the versions of mutual constitution reify their related elements (2019, 176). This makes the processes of mutual constitution invisible and appear as if the structure were stable instead of dynamic. The authors criticize that categories are often treated as physical objects and not as properties of objects. For example, studies focusing on *race* tend to render invisible the experience of the complete individual, who is never only defined by *race*. To address such shortcomings, Jorba and Rodó-Zárate (2019) developed the properties framework. It aims to avoid objectification of social categories through its simultaneous application to the individual and structural dimensions. In the individual dimension, it analyzes experiences of discrimination as emergent phenomena, which are constituted by all individual properties of a given person. For example, the age and gender of a 20 year-old woman are properties which, as a whole, constitute her experiences in society. And while the emergent phenomenon to be explained—her experi-

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9 See Traußneck (2023) for a discussion of intersectionality as traveling theory in Germany.

10 For a deeper investigation into different understandings of the mutual constitution paradigm, see Jorba and Rodó-Zárate (2019).

ence of discrimination—is constituted by those properties, they themselves do not constitute one another. That is, the age of the women is not related to her gender, as each property can change independent of the other (Rodó-Zárate and Jorba 2022, 30). Moreover, one effect of a certain property can mitigate effects of another property, while the effects themselves are affected by the social context. All properties taken together constitute the social position of an individual. The social position leads to the effects level, which can be endowed with value. For example, failing to fulfill a given norm—for example not being cisgender—can be stigmatized. These values are socially and historically constructed and may differ between cultures and countries, respectively. Furthermore, "a combination of some specific positions has (and receives) concrete effects in a society." (2022, 33) This emphasizes intersectional power relations. On the structural level, properties can be understood as the "adjectives" of a system. For example, one of the properties of the whole system of power is being patriarchal: "The shift in conceptualization proposed here presents a framework that considers systems as 'adjectives' and not as 'nouns.' That is, the whole system of power is patriarchal, capitalist, and racist – these three properties are its features." (Jorba and Rodó-Zárate 2019,189) At the same time, it is possible to analyze the specific characteristics of, for example, patriarchy, without blurring and confusing it with capitalism. Both can be analytically distinguished and thus keep their ontological specificities, while highlighting how they affect the constitution of the system of power as a whole (ibid.,187–189). Additionally, according to McKinzie and Richards' (2019) proposal for a context-driven intersectionality, these power relations need to be analyzed in their geographic-historical specificity (ibid., 5–6). By highlighting the elements of an intersectional analysis as not static "[t]he emphasis on context draws attention to the fact that intersectional projects have unique racialized, classed, and gendered spaces, places, histories, and geographies." (ibid., 10) In other words, social categories and their definitions are influenced by the social, political, cultural, and historical context (ibid., 5–6). The relation between the properties and the experiences as well as the world system of power as a whole can be described as emergent. The categories alone cannot predict experiences of discrimination or privilege. Categories may relate to one another, or not: "Categories relate to each other through their effects on emergent experiences in multiple ways" (Jorba und Rodó-Zárate 2019, 191). This plural approach enables grappling with diverse relations among categories and their contextualization. In sum, the properties framework operates without reifying its elements and thereby avoids an additive model of discrimination. For, "although Crenshaw herself was explicit in saying that the crossroad metaphor was about discriminations (effects), many authors have taken it to be about identities (positions)." (Rodó-Zárate and Jorba 2022, 28)

In the following section we add the issue of proximity to the idea of a context-driven intersectionality (McKinzie and Richards 2019). To do so, we draw on examples found in existing literature in order to illustrate how proximity is relevant to intersectional theory. Because the ethos of cohabitation proposed by Hark (2021) explicitly encompasses nonhuman others who have not yet been prominently included in intersectional theory, most of our examples address proximities of human and other animals. Even so, our last example will leave the field of Human-Animal Studies to better illustrate one aspect central to the idea of cohabitation: sharing the world, even with our "enemies."

3. Intersectional Proximities

Considering proximity can entail a broad array of phenomena: proximity to someone or something can happen unwillingly but can also be more or less willingly chosen. The term can be used to describe a literal physical or emotional closeness, the sharing of spatial or social space, but proximity can also occur in discourse, when some things or persons get, to use Sara Ahmed's (2014, 90–92) expression, "stuck" together. Sometimes, but not always, this sticking together can happen as a reaction to proximities that are chosen. In this section, we first consider different examples of intersectional proximities, and then come back to an actual definition of the term as we propose it. We have tried to narrate the following examples in a way that builds as best as possible onto the previous ones, so that the additional aspects each example introduces into the discussion can be seen in their continuation but also differences from the previous ones. Finally, we discuss the possible analytic contributions of proximity to intersectional and cohabitation theory in the conclusion.

Broadly speaking, discrimination and proximity are most often linked through what is commonly termed the contact hypothesis (cf. Stürmer 2008). Here, the general idea is that repeated contact to members of other social groups, enabled by spatial proximity, will reduce discrimination. Even though some critics pointed out that this hypothesis only holds under certain circumstances (e.g., El-Mafaalani 2021, 46–47), we focus here on other observations leading towards different perspectives altogether.[11] One such observation can be found in Fahim Amir's (2021 [2018]) *Schwein und Zeit*, a book rife with examples of *intersectional proximities* we return to later. Amir argues that spatial proximity does not nec-

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11 The following thoughts on intersectional proximities share some similarities with Goffman's briefly introduced concept of the "courtesy stigma" (1986 [1963], 30–31).

essarily lead to social proximity, and indeed that spatial distance—the freedom of not having to witness constant violence or discrimination—can at times even enable a paradox sensitization:

"The spatial separation between country and city, production and consumption in capitalist modernity also substantially contributed to a de-brutalization of the human-animal relation. As slaughterhouses gradually disappeared from cities, people grew up without the soundtrack of cries of fear. The same process, therefore, which lead to an immense quantitative increase and qualitative intensification of animal use, also brought about its sharpest critics. These often did not stop at criticizing 'excesses' particularly deserving of condemnation, but began to fundamentally rethink the human-animal relation." (ibid., 31)

All the while, the situation inside the slaughterhouses themselves, naturally, was very different. In *Animal Rights/Human Rights*, David Nibert (2002) explores the entanglements between human and nonhuman oppression and liberation. Nibert illustrates how upholding the oppression of diverse animals is only possible when the oppression of different groups of devalued humans is also upheld. Industrial slaughterhouses, he argues, have some of the worst working conditions only the most vulnerable workers are 'willing' to accept: poor hygiene, frequent and grievous occupational accidents at low wages, and long working hours, coupled with the constant stress of dying animals who often times defy their prescribed roles.[12] For the purpose of our argument in this article, we can keep in mind: keeping slaughterhouses operational necessitates the discrimination not only of animals but also humans forced one way or another to work under oppressive conditions—conditions that are, not least of all, made oppressive because they are *proximate to* oppression. Diametrically opposed to the contact hypotheses, then, proximity can, in the worst case, lead to more, not less discrimination.

This observation also holds true for the following example of intersectional proximity, which illustrates how a (discursively generated) proximity of different groups directly influences their respective treatment. More specifically, we argue that the ill treatment of some can, through proximity, be transferred onto others and thereby reveal how indeed everybody is situated in a world in which analytically separable forms of discrimination are, as Jorba and Rodó-Zárate put it, "adjectives" of a whole rather than separate (2019, 189). In an article about the *English Sparrow War*, Fine and Christoforides (1991) analyze the effects of applying human metaphors to the treatment of nonhuman animals, specifically the so-called English sparrow in the late nineteenth century United States.[13] By identifying the

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12 In Germany, the poor working conditions of migrant laborers in the "meat" industry were 'rediscovered' in a series of scandals at the outset of the Covid-19 pandemic, see Birke (2021).

13 Usually, this kind of inquiry is only directed the other way round, that is, how applying nonhuman animal metaphors to humans encourages their treatment as less than human, i.e. devoid of any rights.

birds as "immoral immigrants" not unlike their human counterparts, a process the authors name "metaphorical linkage", the "traits – filthiness, sexual immorality, dishonesty, laziness, mob violence, impudence, noisiness – that were said to characterize immigrants were also alleged to describe their avian cousins." (ibid., 384) The human immigrants, in turn, were portrayed as "'subhuman' – physically, morally, and in intelligence" (ibid., 382) – via animal metaphors, while the nativist logic of the era bore down on sparrow and human other alike. The verbal and physical attacks on human immigrants were accompanied by (institutionally-backed) calls for violence against and even for the extinction of the birds, while their shelter and protection were prohibited. Their social positions in this sense moved closer to one another: Fine and Christoforides contend that "[t]he social position of these birds is isomorphic with that [of] the more despised immigrant population, and their claims for sympathy – for their involuntary importation and the labor that was their lot – are similar as well." (ibid., 386) This example shows how the discrimination and stereotypes of dissimilar groups can be transferred onto one another by generating discursive proximity through sticking them together via, in Fine and Christoforides' terms, the "master problem" (ibid., 389), or, in the words of Ahmed, the "sticky sign" (2014, 91–92) of the despised "immigrant".

In *The Cultural Politics of Emotion* Ahmed coins her term "sticky sign" and explains how signs become sticky through repetition using the example of a racial slur:

> "The sign is a 'sticky sign' as an effect of a history of articulation, which allows the sign to accumulate value. The stickiness of the sign is also about the relation or contact between signs. The [racial slur] becomes an insult through its association with other words, other forms of derision. However, such words do not have to be used once the sign becomes sticky. To use a sticky sign is to evoke other words, which have become intrinsic to the sign through past forms of association. The [racial slur] might then stick to other words that are not spoken: immigrant, outsider, dirty, and so on." (ibid., 92)

As the above and the following examples show, sticky signs can also be used to stick different (human and nonhuman) people together, and by doing so attribute real or imagined characteristics of one onto the other. In the above example the human and avian "foreigners" stuck together were brought into proximity *only through* the process of shared and transferred stigmatization, which linked each one, more or less separately, to the abstract intermediary of "the immigrant." In the following example, in contrast, the groups stuck together are already close to each other insofar as they are inhabiting shared living spaces. This association can have positive effects, if the (sticky) sign acquires a positive connotation by its

proximity to already valued others.[14] Amir (2021 [2018], 18–19) shows, for example, that this is the case for the horse, who by being placed in proximate relation to nobles becomes symbolic for nobility itself. Not surprisingly, then, the first animal protection law of the Western world was to protect horses from "plebeian violence." (ibid., 19) Similarly, the living together of swine and human others in preindustrial cities was predominantly evaluated from a perspective saturated with class resentments from above.[15] The rapid growth of New York at the time brought "hitherto spatially segregated and socially distant city districts abruptly into direct proximity." (ibid., 54) Especially the new swinish neighbors, who in 1820 numbered roughly one fifth of the human population in New York, were challenging "[t]he morals, eyes and noses of cultivated circles." (ibid., 55) Referring to the work of Catherine McNeurin on the topic, Amir asserts that the nobility's agitation against their four-legged neighbors was just as well directed at "recalcitrant districts with their Irish, Afro-American, migrant inhabitants – among them 'untoward' women [...] This especially showed in the many caricatures and smear poems, letters to the editors and comment sections in newspapers; here the pigs and their owners became objects of ridicule with interchangeable characteristics." (ibid., 57) Nonetheless, both not only got stuck to and with each other because they were close, but also because of what their closeness was interpreted to effectuate (ibid., 66). On the basis that it must be impossible for them to support their hogs via legal means, the ruling classes assumed that swine corrupted their working-class owners to commit crimes. More than that, the possibility that these swine enabled workers and single women to a subsistence without wage labor was suspect to them, and the proximity of these swine to their working-class owners a sign not only of the absence of civilized life—and hygiene—but of the swinish nature of the workers themselves. The latter, in turn, embraced this equation and chose to organize themselves as and in solidarity with multiple swinish personae (ibid., 66–68).

Our final example illustrates how actively choosing the presence of explicitly unchosen others to some can appear as not choosing them. In this way, the example touches on central questions and difficulties of allyship. Concerning the ethos of cohabitation, this example is of special importance, as it addresses the pivotal issue of (not) sharing the world even with those perceived as enemies. In *A Queer Way Out*, Hila Amit (2018) analyzes the motivation and process of queer Is-

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14 In her later work, Ahmed qualifies her argument of stickiness to a certain extent: "The nature of affective accumulation might depend on the kind of value being given to signs. For example, positive affective value can make signs appear lighter or buoyant, whereas negative affective value can make signs seem heavy. Stickiness, I suggest, relates specifically to negative affective value, which is in turn how bodies associated with such signs also become stuck." (2012, 212–213)

15 For this example, we are referring to Amir (2021 [2018], 53–73).

raeli activists leaving Israel. What sets her study apart from other Israeli studies about emigration from Israel is that Amit does not frame the decision as purely economic. Instead, she is interested in political reasons for the departure, which other, mostly Israeli, studies overlook.[16] One chapter (ibid., 67–99) focuses on the feelings of unbelonging queer left-wing activists have vis-à-vis Israeli society, a feeling that does not stem from their sexuality (alone), but "the queer[17] ways they position themselves in relation to the nation." (ibid., 68) This positioning some-times involves choosing to stand "side by side with Palestinians" (ibid.), who are "the most salient Other in Israel" (ibid.), therefore earning left-wing Israelis[18] the designation of "Other from within" (ibid., 68). They become someone who is seen as "identify[ing] with the enemy" (ibid., 70), who by being thus identified with their proximity to Palestinians, are "considered a threat to the security of the state, just like the Arabs [a generalized Israeli term for Palestinians] themselves." (ibid., 69) Just like them, they become unwanted, decidedly unchosen, and are encour-aged to leave (ibid., 70). Still, for some it was the failure of the state to protect them against anti-queer violence and to safeguard their safety, "even while protesting against forms of oppression the state had created" (ibid., 93) that ultimately led to feelings of abandonment and of being forsaken, which, according to Amit, "shows that they had *some* sense of belonging." (emphasis in original; ibid.)

Looking at all the examples given above, we now try to define exactly what we mean by intersectional proximities: *intersectional proximities* are real or imagined, chosen or unchosen instances of closeness that highlight the mutually constitu-tive quality of oppression and liberation by involving groups or individuals who are differently affected by the way in which inequality is organized, but whose sheer proximity influences how each other is affected – sometimes by transfer-ring certain aspects, images and discrimination – and experiences these effects.

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16 Interestingly, these are not missing in (German) studies on the Israeli migration to Germany, see for example Kranz (2015) or Remennick (2019).

17 Queer here simultaneously refers to sexuality and related topics such as family-building, as well as a political practice of being and doing (cf. Sullivan 2003; Förster 2017).

18 The distinction of political left- vs. right-wing activists in Israel-Palestine largely rests on the stance towards the Israeli-Palestinian conflict, with the left identifying themselves with the wish for a peaceful and/or just resolution. For a detailed study on the motifs and ethics of the Israeli radical left, see Wright (2018).

4. Conclusion: Intersectional Proximities, Intersectionality and Cohabitation

Intersectionality as a tool of analysis can be used to describe and understand the heterogeneity of social groups and their liberation struggles by avoiding a one-dimensional framing. As a political project, however, it is common to include a normative perspective into intersectionality (e.g., Masquelier 2022). Understanding intersectionality in this way, all oppressions are mutually constitutive and must be tackled simultaneously, as it is not possible to achieve the liberation from several mutually constitutive oppressions in a one-dimensional way. Rodó-Zárate and Jorba's properties framework adds the idea that rather than individual positions or identities, the individual experience of discrimination as well as the whole of the world's system of inequality are to be thought of as intersectionally emergent phenomena. We argue that adding intersectional proximities to the analysis of oppression helps illustrate how experiences of discrimination and analytically separable social structures of oppression indeed potentially affect everyone, if *only* through proximity. In our view, incorporating intersectional proximities into intersectional analysis might therefore prove to be a powerful tool in connecting the (individual) experience of discrimination with its all-encompassing structural character.

The concept of intersectional proximities illustrates how nobody is located outside of any given social structure of discrimination, whether or not they themselves are directly targeted by it. Furthermore, they show that the different structures of discrimination that make up the shared world not only "interact" or "intersect" in individuals, but as illustrated in the examples of proximity above, also *across* (groups of) individuals. The analytic gain of intersectional proximities therefore focuses on structural discrimination by transcending the dimension of the individual, while nevertheless contributing to the understanding of individual experiences of discrimination. When it comes to the idea of cohabitation, intersectionality and intersectional proximities offer unique and important insights as well. While intersectionality is useful for thinking about the world as a shared project, considering intersectional proximities in particular is helpful for illustrating this world-sharing, for analyzing processes of differentiation between chosen and unchosen ones and, as we have argued, the consolidation and defense of this differentiation by declaring and treating the diminished status of being not chosen as transferable through proximity. This possibility of transfer, as Erving Goffman argued, can dissuade contact and encounters across differences: "the tendency for a stigma to spread from the stigmatized individual to his close connections provides a reason why such relations tend either to be avoided or to be terminated, where existing." (1986 [1963], 30) In this way, thinking about

intersectional proximities greatly contributes to the analysis of world-sharing and of possibilities for and hurdles to solidarities and allyship.

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Mental Disorders in the Context of Marginalization Dynamics

Philipp Schmidt

Abstract

Mental disorders are associated with multiple and frequently occurring marginalization dynamics. At an individual level, people with mental disorders repeatedly experience social, economic, and political exclusions. At a societal level, marginalization dynamics pose a threat to social and societal cohesion. This contribution discusses the important but relatively underreported role of mental disorders with respect to dynamics of marginalization, multiple disadvantage, and intersectionality, and the relevance of considering mental disorders constantly in these research areas.

Keywords: mental disorders; exclusion; social cohesion; multiple disadvantage; intersectionality

This contribution aims to shed light on the relationship between mental disorders and marginalization, stigmatization, and cohesion dynamics, with a particular focus on the relevance of mental disorders in research about social cohesion and intersectionality. The contribution is based on previous studies examining mental disorders and various marginalization dynamics, both within and outside of intersectionality research. First, the associations between mental disorders and various stigmatization and marginalization dynamics are presented, with emphasis on the social conditions and experiences of individuals with mental disorders that increase the risk of further marginalization. Second, the risk of multiple disadvantage in the context of mental disorders is presented and discussed in relation to research on intersectionality. Here, the central question is what relevance or role mental disorders assume in the context of multiple disadvantage and intersectionality. No conclusive or unambiguous answer is intended with respect to the question of whether mental disorders should be considered a separate form of disadvantage or discrimination within intersectionality research. This would exceed the scope of this contribution and, at the same time, would not adequately account for the complexity of the concept of intersectionality. Rather, addressing the question of the relevance of mental disorders in the context of multiple disadvantage and intersectionality serves to provide an introductory consideration of mental disorders within the context of intersectionality—entirely in the sense of a brief spotlight. Finally, the question of supportive factors for reducing marginalization dynamics and promoting constructive cohesion experiences is raised and potential implementations are presented.

1. The Stigma of Mental Disorder as a Cause of Marginalization Processes

Although attitudes toward people with mental disorders have improved in recent years (Schomerus et al. 2023), people with mental disorders are still highly stigmatized[1] (e.g., Alonso et al. 2008; Kaushik et al. 2016; Rössler 2016), resulting in reduced life opportunities and restrictions on independent functioning beyond the impairments associated with the mental disorders themselves (e.g., Heflinger and Hinshaw 2010). In other words, people with mental disorders often expe-

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[1] Due to the limited scope of this contribution, a comprehensive conceptualization including the derivation of specific dimensions of stigmatization will be omitted. Instead, general and relevant associations between stigmatization—understood as an exemplary, but at the same time central factor in marginalization dynamics—and mental disorders are outlined.

rience marginalization due to stigma, which can lead to avoidance tendencies in situations of anticipated stigmatization, which can intensify and extend both the mental disorder and subjective experiences of marginalization. Further, people with mental disorders and their relatives are less likely to seek help and support services than mentally healthy people because they fear being stigmatized (Burgić Radmanović and Burgić 2017). Subjective fears of stigmatization can also affect attendance at work or school. In addition to the influence of such psychological factors of affected people[2] on exclusion processes, further research findings have demonstrated that certain characteristics across mental disorders tend to increase experiences of stigmatization such as social rejection (Feldman and Crandall 2007). These include (1) assumed personal responsibility for the illness, (2) dangerousness of the illness, and (3) rarity of the illness. These outcomes are in line with previous research findings suggesting that people with schizophrenia, alcoholism, and other drug addictions were generally judged to be more unpredictable and dangerous than people with major depression, panic attacks, dementia, or eating disorders (Crisp et al. 2000). Thus, mental disorders such as schizophrenia, alcoholism, and other drug addictions were more likely to be associated with perceptions of danger and rarity. Alcoholism and other drug addictions were furthermore seen as self-inflicted and thus viewed in terms of personal responsibility for the illness. The question as to which factors in turn affect "the 'big three' dimensions of mental illness stigma" (Feldman and Crandall 2007, 148), such as norms and values transmitted through socialization or education within a society, has not yet been investigated.

At this point, it is already evident that the stigma of mental illness is very complex, multidimensional and heterogeneous. For future research, differentiation between different components of stigma and between the different types of mental disorders seems necessary. In this regard, the inherent psychosocial difficulties of different mental disorders[3] should be taken into particular account, as these may influence the intensity, duration, and extent of any marginalization experiences. Knowledge of the essential aspects of stigmatization dynamics is important with resepct to understanding the often successive course of social, economic and political exclusion experienced by people with mental disorders.

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2 These can be distinguished by cognitive level: "the others don't take me seriously anyway" (fear of stigmatization); affective level: fear, shame; and behavioral level: avoidance of school or work.

3 For example, a person diagnosed with social anxiety disorder is afraid of situations in which he or she is observed by other people and therefore tends to engage in avoidance behavior vis-à-vis such anticipated situations. A person diagnosed with isolated Tourette's syndrome will not exhibit avoidant behavior, because of the isolated mental disorder itself.

2. Associations between Mental Disorders and Social, Economic, and Political Exclusion

Mental disorders are closely associated with three domains of marginalization, namely, (1) social, (2) economic, and (3) political exclusion. By focusing on the phenomenon of cohesion in this volume, the relevance of exclusion is increased once again. Zick and Rees (2020) clarify this in their definition of cohesion:

"The identity that groups circumscribe as a 'we' has a central function here, because it simultaneously circumscribes who the 'others' are. In our understanding, cohesion can therefore not be defined without describing who is not held together with or who is excluded. On the behavioral level, societal or social cohesion on the inside also goes hand in hand with conflict, exclusion and demarcation on the outside. The emphasis on the cohesion of a society as well as in groups can thereby be accompanied by exclusion and exclusion of groups, especially minorities." (130 f.)

This social psychological approach highlights marginalization and stigmatization dynamics, especially with respect to how exclusion can be understood as a destructive form of cohesion. Research has shown that individuals with mental disorders are more likely to experience social, economic, and political exclusion than the general population (Lund et al. 2011), wherein marginalization experiences in these three domains often overlap and interact. Accordingly, individuals with a mental illness may experience a lack of social support, difficulty in accessing education or employment opportunities, and reduced participation in community activities (e.g., Thornicroft et al. 2016).

Social exclusion is one of the most significant domains of marginalization faced by people with mental disorders. A substantial aspect of the social exclusion of people with mental disorders relates to the vicious circle of marginalization. For example, mental disorders can further exacerbate social exclusion by impairing a person's social abilities. Social exclusion, in turn, can lead to the onset or worsening of mental disorders by limiting access to resources and limiting opportunities for recovery (Killaspy et al. 2011). Several studies have found associations between mental disorders and social exclusion. For example, Richter and Hoffmann (2019) found that people with severe mental disorders—in terms of a dysfunctional combination of diagnosis, severity, duration, and treatment of mental disorder(s) (Parabiaghi et al. 2006; Ruggeri et al. 2000; Schinnar et al. 1990)—were more socially excluded than people without pathological mental health problems. This was often associated with intense experiences of loneliness among people with mental disorders. This finding is consistent with further findings that social exclusion was associated with poorer mental health (see, e.g., Brandt et al. 2022; Christiansen et al. 2021; Coyle and Dugan 2012). Specifically, individuals who felt socially excluded reported higher levels of anxiety, depression, and stress.

Economic exclusion refers to the process of excluding individuals or groups from economic opportunities and resources. People with mental disorders are often subject to economic exclusion, leading to a reduced quality of life and increased poverty (Mörchen et al. 2002). Economic exclusion can manifest in various ways, such as reduced employment opportunities, reduced access to education and training, and limited access to financial resources. Previous studies have already shown that people with mental disorders are less likely to be employed than those without mental disorders (see, e.g., Social Exclusion Unit 2004). Reduced employment opportunities can lead to economic exclusion and increased poverty, which can further exacerbate mental health problems. Poverty and its associated economic exclusion, in turn, reduce access to social contacts, which in turn increases the likelihood of the social exclusion experiences among people with mental disorders. Limited access to education and training or related qualifications is another form of economic exclusion faced by individuals with mental disorders (Bowman et al. 2017). Education and training are essential for acquiring skills and knowledge that can lead to better employment opportunities and economic independence. For example, findings by Alaie et al. (2022) not only show that depression in adolescence was associated with marginalization in adulthood, but also suggest an increased risk of later labor market marginalization among depressed adolescents, particularly those with persistent depressive disorders. For adolescents with major depression, entry into tertiary education mitigated the association with later experiences of marginalization. Accordingly, the lack of access to education and training can lead to reduced opportunities for social mobility, leading to a further deterioration of mental health.

Political exclusion can occur when individuals with mental disorders are not adequately represented in decision-making processes that affect their lives, such as policies related to mental healthcare services, housing, and employment. The lack of representation and participation can lead to policies that do not address the needs of individuals with mental disorders and further marginalize them from society, which can further exacerbate mental health problems (Friedli and Parsonage 2007).

In sum, the marginalization of persons with mental disorders involve complex, mutually reinforcing interactions between social, economic, and political factors. The phenomenon of self-stigmatization takes on a special role in this context. It has been shown that people with mental disorders who internalize stereotypes about their illness have lower self-esteem and notions of self-efficacy, which in turn can increase the risk for depression and hopelessness (Link and Phelan 2001; Rüsch et al. 2014). Several studies suggested that self-stigma in itself increases the likelihood of social, economic, and political exclusion. Accordingly, self-stigma worsened chances for recovery (Boyd et al. 2016; DeViva et al. 2016),

inhibited independent living (Harding 2017; Kranke et al. 2017), and impaired service utilization (Corrigan et al. 2014). People with mental disorders often perceive exclusion in multiple contexts and domains of marginalization. As discussed, disadvantages relate both to the mental disorders themselves (and often associated intrapersonal conflicts) and to the associated exclusions. Furthermore, mental disorders often occur with various other stigmas, which in turn result in further and intensed experiences of marginalization, as discussed below.

3. Mental Disorders: Multiple Disadvantage and Intersectionality

It is important to consider the impact of mental disorders in the context of multiple disadvantage and intersectionality. Intersectionality refers to the idea that individuals may experience multiple forms of disadvantage or discrimination simultaneously, based on the interwoveness of multiple inequality ideologies such as racism, sexism, ableism, or the societal stigmatization of ethnicity. For example, a person with a mental disorder who also belongs to a marginalized ethnic group may experience more severe forms of stigma than someone who only experiences one category of marginalization (i.e., if there is exclusively a mental disorder or the person belongs exclusively to a marginalized ethnic group). In addition to the findings described earlier on marginalization dynamics within and across domains of social, economic, and political exclusion, according to which unemployment, poverty, and loneliness/social isolation are significantly related to mental disorders (see section 2), other studies have examined mental disorders as one of several simultaneously occurring stigma (e.g., Denise 2014).

At this point, however, it should be highlighted that the subjective suffering or subjectively experienced impairment of people with mental disorders in our society is already more pronounced in the presence of one isolated mental disorder than in people without mental disorders (Alonso et al. 2018). Further, people who show at least three co-occurring mental disorders are nearly five times more likely to experience severe discriminations or disadvantages than people without mental disorders. Earlier results by Druss et al. (2009) already indicated that one's general experience of discrimination or disadvantage was rated to be significantly higher by people with mental disorders than by people with chronic medical disorders. Furthermore, severe experiences of discrimination or disadvantage were reported by a significantly higher proportion of people with mental disorders than by people with chronic medical disorders. While chronic medical disorders were most likely to be associated with experiences of discrimination or disadvantage in the contexts of work and home life, mental disorders were most likely to be associated with problems in the contexts of social and intimate relationships. Co-

morbidity between chronic medical and mental disorders led to a significant increase in reported experiences of discrimination or disadvantage. Not surprisingly, the empirical research has shown that additional coexisting stigmas or categories of marginalization increase and intensify the experience of disadvantage among people with mental disorders.

While the question of whether mental disorders should be considered a separate form of disadvantage or discrimination within intersectionality research remains inconclusive (see, e.g., Fagrell Trygg et al. 2019; Keith and Brown 2018), studies have illustrated the relevance of mental disorders with respect to intersectionality. It has been demonstrated that people disadvantaged by marginalization processes were more likely to report mental health problems than non-disadvantaged people. For example, in a review of the broad literature on intersectionality and depression, Patil et al. (2017) conclude that females are significantly more likely than males to experience depressive symptoms. Moreover, ethnic minority affiliation further increased the likelihood of occurrence of depressive symptomatology in female individuals compared to male individuals belonging to an ethnic minority. A recent study using a large, nationally representative sample has largely confirmed these findings (Evans and Erickson 2019). Here, higher depression scores were found for females, ethnic minorities, or members of a lower socioeconomic class compared to people who had a male or white group affiliation. The results of another study, Vu et al. (2019), were in line with both Patil et al. (2017) and Evans and Erickson (2019), while also concluding that experiences of discrimination related to both ethnic and sexual minority affiliations were associated with both more significant depression symptoms and increased substance use among women. Even when sexual orientation was examined separately, white sexual minority women were found to be at increased risk for depressive symptoms and substance dependence when compared with white heterosexual women. Further, results indicated a higher level of depressive symptoms among white sexual minority men compared with white hetereosexual men.

It has also been shown that people with mental disorders experience greater discrimination or disadvantage in the contexts of social and intimate relationships than people with chronic somatic illnesses (Druss et al. 2009). Additional marginalization categories, such as additional mental disorders or physical stigma, in turn coincide with increases in subjectively experienced discrimination or disadvantage. Existing studies that examine intersectionality and mental disorders have shown that people who belong to or identify with multiple marginalization categories demonstrate increased mental disorder symptomatology.

Regardless of the question as to whether mental disorders constitute an isolated form of disadvantage within the intersectionality concept, it can be con-

cluded that mental problems or disorders contribute to the development, maintenance, and increase not only of further mental disorders, but also of further experiences of marginalization. The vicious circle of marginalization in the case of mental disorders and the phenomenon of self-stigmatization (Dubke and Corrigan 2021) are particularly relevant in this regard. While other marginalization categories or stigmas, such as belonging to an ethnic minority or having a physical disability, predominantly affect an extension and intensification of marginalization (with respect to social, economic, and political exclusion; see section 2)[4], the marginalization category or stigma of mental disorder additionally influences the maintenance, extension, and intensification of the existing mental disorder as well as the development of further mental disorders. Again, this raises questions about intersectionality for further research, including whether mental disorders are an independent form of marginalization and/or the consequences of experienced marginalization from different domains and contexts? Independent of a clear answer to the question supported by empirical research, the findings presented in this chapter suggest that mental disorders can be considered as an isolated aspect of marginalization, which means that mental disorders are stigmatized in ways that lead to marginalization dynamics. At the same time, mental disorders can also result from experienced discrimination and disadvantage. This highlights the relevance and complexity of mental disorders in the context of marginalization dynamics and expressions of destructive social cohesion.

4. Conclusion, Implications, and Future Directions

The presented findings highlight the negative impacts of marginalization dynamics within and across domains of social, economic, and political exclusion for people with mental disorders. These experiences can lead to further mental health problems such as chronic stress and anxiety disorders with associated avoidance behaviors, further exacerbating the already existing mental health distress. Therefore, it is crucial to recognize the (single) disadvantage, but also the multiple disadvantages faced by people with mental disorders, and to address prevention and intervention at the individual, structural, and systemic levels in order to effectively reduce marginalization dynamics and promote social cohesion.

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4 For example, a person with a physical disability does not get a job because of this stigma, which can affect economic resources. This, in turn, can inhibit cultural and social participation, reducing, for example, the likelihood of meeting people who can have a positive impact on a job search through existing social networks.

The theoretical implications of the existing studies relate in particular to the need to improve understanding of mental disorders and the associated marginalization dynamics across society. Preventative and intervening attempts should be made at individual, structural, and systemic levels to increase understanding of mental disorders among the general population and to increase interactions with persons with mental disorders. At the individual level, it is essential to understand the individual's distinct disorder and its related psychoeducational components (Dubke and Corrigan 2021). On a structural and systemic level, this understanding should be put to work to reduce marginalization dynamics.

Accordingly, practical implications can be formulated in terms of the need to develop and implement measures that promote social inclusion, equal opportunities, and social support for people with mental disorders. These include social support from family, friends, and mental health professionals, as well as access to high-quality mental health services. Other measures include creating inclusive communities (see Kern et al. 2020), fostering social support networks, promoting empathy, respect, and tolerance, and involving marginalized individuals in decision-making processes related to their own mental healthcare. However, findings suggest that structural and systemic interventions should not be implemented too rigidly (Oexle and Corrigan 2018). Instead, interventions to reduce disadvantage for people with mental disorders, in terms of contact-based interventions, should be flexible and targeted. In addition, addressing discriminatory policies and practices, promoting cultural competence in mental health care, and advocating for social policies that promote social cohesion and reduce marginalization may also have practical benefits for promoting constructive societal/social cohesion with respect to mental disorders.

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Discrimination as a Threat to Social Cohesion: An Intersectional Analysis of Discrimination and its Impact on Social Cohesion

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Abstract

This chapter quantitatively analyzes experiences of intersectional discrimination using data from the study "Discrimination Experienced?! Experiences of Discrimination in Saxony" and offers interpretations about how such experiences relate to social cohesion. Using selected everyday situations as examples, it compares the frequency of discrimination experiences based on different sociodemographic characteristics and examines how the frequency of certain experiences changes when different marginalization factors intersect. It also considers different behaviors affected persons adopt to avoid potential discrimination situations and asks how discrimination experiences based on multiple forms of marginalization affect social cohesion, which is conceptualized as a normative concept calling for equal participation of social actors. In conclusion, discrimination and strategies adopted to avoid discrimination limit social participation and thus pose a threat to social cohesion. The study is based on two population surveys, each with 2000 respondents in Saxony and in the rest of Germany, as well as on a non-representative survey with more than 1500 respondents.

Keywords: discrimination; intersectionality; social cohesion; responses to discrimination

Discrimination is a threat to social cohesion and to the promise of equal participation in society. People experience discrimination based on different characteristics in different situations. There are numerous studies on discrimination in Germany (Beigang et al. 2018; Kronenbitter et al. 2023; Federal Anti-Discrimination Agency 2021). However, the relationship between discrimination and social cohesion is rarely elaborated (Florez et al. 2020; Oxoby 2009). This article conceptualizes discrimination as contradictory to a normative concept of social cohesion based on solidarity and trust.

Testing the limits of quantitative surveys, we examine experiences of discrimination and their consequences from an intersectional perspective. In doing so, we also show the limitations of both population-representative surveys and of items that should be connected to broad segments of the population. Likewise, it becomes clear that qualitative analysis, while unable to quantify the phenomenon of intersectionality, can provide much stronger evidence. The data we draw on are provided by several surveys conducted for the study "Discrimination Experienced?! Discrimination Experiences in Saxony" (Kronenbitter et al. 2023). While the surveys are quantitative, they include many open questions that allow us to examine certain phenomena in a more qualitative way.

To this end, we first briefly present the current research on intersectional discrimination and social cohesion (1). We then present the data and our methodological approach (2). Finally, we analyze how often people report experiences of discrimination. Here, we ask whether the relationship between discrimination-prone sociodemographic characteristics and frequency of discrimination experience is additive or whether an interaction effect emerges, which would illustrate intersectionality (3.1). In addition, we contrast three selected everyday discrimination situations. We analyze the frequency of these situations based on sociodemographic characteristics and how the frequencies change in relation to gender and age (this limitation to two sociodemographic characteristics was necessary due to case numbers of intersecting analyses) (3.2). Subsequently, we analyze avoidance strategies employed by those who are (potentially) affected by discrimination in order to avoid further experiences of discrimination. This provides an indication of where social participation is restricted for people who are (potentially) affected by discrimination and where social cohesion is therefore endangered (3.2). Finally, we summarize (4) and discuss (5) the results.

1. State of Research

Discrimination encompasses behaviors by individuals, structures, and institutional actions that contribute to creating, maintaining, or reinforcing advantages

for some groups and their members over other groups and their members (Dovidio et al. 2010, 10; Scherr 2016, 5). Being subject to discrimination is thus a form of disadvantage and exclusion, which can occur in terms of material resources, political and social participation, and recognition and respect (Klose and Liebscher 2015, 23). There are many studies on discrimination in Germany, each with different approaches to analyzing discrimination. Many examine subjective experiences of discrimination (Beigang et al. 2018; Kronenbitter et al. 2023; Richter et al. 2021), while other studies employ methods such as testing, for example by varying the attributed country of origin on a housing application (Müller 2015). There are also several studies on attitudes toward diversity and discrimination (GESIS 2018; Sinus Sociovision 2008; Zick and Küpper 2021). While the studies show different frequencies of discrimination, their results make it clear that discrimination is a social reality in Germany. The consequences of discrimination pose a particular threat to social cohesion if they lead to a situation in which equal social participation is not possible.

Social cohesion is often regarded as an important asset that is necessary for a functioning community and welfare state (Quent et al. 2020; Deitelhoff et al. 2020). However, social cohesion is not seen merely as an empirically observable concept, but above all as a normative concept that presupposes solidarity and trust (Forst 2020). It is thus distinguished from destructive forms of cohesion characterized by exclusion (Pickel et al. 2020, 125–128; Deitelhoff et al. 2020, 18–19; Zick and Rees 2020). Such forms include, for example, racist, sexist, or ableist cohesion within the dominant society, which is maintained through exclusion and marginalization. While destructive forms of cohesion are empirically observable and challenged by recognition struggles of marginalized groups and their allies, a normative concept of social cohesion must view these recognition struggles as constructive and necessary. Social cohesion must first overcome these real-world inequalities and injustices to evolve into the normative concepts posited.

In this article, our argument is that if discrimination is a challenge to social cohesion, the threat of intersectional discrimination is particularly strong. Intersectional discrimination arises from the entanglement of dimensions of discrimination (Center for Intersectional Justice 2019; Marten and Walgenbach 2017; Erel et al. 2007; Winker and Degele 2010; Traußneck 2023). Crenshaw, who first conceptualized intersectionality (1989), argues that a new quality of discrimination emerges through the interaction of different social characteristics.

While intersectional discrimination can be demonstrated very clearly based on analyses of specific case constellations and through qualitative studies, statistical analysis of intersectionality is more difficult. As will be shown in the following, this is due, among other things (such as difficulties in operationalizing intersectionality in quantitative surveys), to the high case number required for

this purpose as well as the limited possibilities for differentiation in the use of quantitative items. Unsurprisingly, there is a recurring debate as to whether intersectionality can be researched quantitatively at all (Hancock 2007; Bauer et al. 2014). Accordingly, this paper also has limitations. These are discussed in both the analysis (4) and outlook section (6).

Discrimination also influences social cohesion via the strategies people employ in response to experiencing discrimination, whether immediately or as middle to long-term coping strategies. Reactions to discrimination and coping strategies are often studied at the individual level. Many of these studies are limited to one dimension of discrimination, for example, racial discrimination (Rausch et al. 2021; Lamont et al. 2016; Scherr and Breit 2020). Both the short-term reactions and the long-term consequences of discrimination can vary according to the social positioning of the individuals experiencing discrimination. For example, cis women more often choose avoidance strategies, such as avoiding certain places in the dark, than cis men (Kronenbitter et al. 2023, 314).

2. Data Basis and Methods

Our evaluations are based on three surveys conducted within the study "Discrimination Experienced?! Experiences of Discrimination in Saxony" (Kronenbitter et al. 2023) by the German Centre for Integration and Migration Research (DeZIM) on behalf of the Saxon State Ministry of Justice and for Democracy, European Affairs and Equality. These surveys record reported discrimination experiences along various sociodemographic characteristics including gender, religious affiliation, outward appearance, age, disability, sexual orientation, racialization, attributions of migrant origin, and socioeconomic status. The surveys asked about experiences of discrimination and responses to discrimination in the last two years. The overall study was accompanied by a participative process that included the expertise of various civil society organizations conducting anti-discrimination work in Saxony. Data collection took place in spring and summer 2021.

Here, we re-analyze three surveys from the study:

- The Saxon population survey, which includes well-founded statements about individual experiences of discrimination and attitudes in Saxony (n = 2.169; mean age = 51,96 years; sd=0.38). It is based on a sample from the commercial online access provider Respondi.
- The comparative population survey in the rest of Germany (all federal units excluding Saxony), which makes it possible to classify these experiences and

attitudes in relation to the national context (n = 2.165; mean age = 51.29 years; sd = 0.39). This is also a Respondi sample.
– The additional survey of people affected by discrimination in Saxony, which makes it possible to look at discrimination experiences and coping strategies of small social groups, such as trans or non-heterosexual people (n = 1.576; mean age = 40.47 years; sd = 0.37). This is a passive sampling, which was advertised via media, flyers, and associations of people who are affected by discrimination.

The numbers of participants included in the population surveys correspond to the respective proportions in the overall population according to gender, age, and education. The third survey was aimed specifically at people who have experienced discrimination. As a result, the proportions of some population groups particularly affected by discrimination are significantly higher than in the population surveys. Thus, only the survey of people affected by discrimination makes it possible to quantitatively record the experiences of groups particularly affected by marginalization. In addition, more detailed open data was recorded in the survey of people affected by discrimination. This enables qualitative analyses and the presentation of examples, in addition to the quantitative evaluations.

For the present analysis, the two population surveys are combined into one population survey. Since the two population surveys essentially correspond to the characteristics of the population in each case, no weighting is applied. This leads to a clear overrepresentation of the Saxon population in the total sample. However, the study "Discrimination Experienced?! Experiences of Discrimination in Saxony" has shown that there are very few differences between the Saxon population and the rest of the population in Germany.[1] The group comparisons presented are based throughout on logistic regression analyses, for which the dependent variables were dichotomized in each case (experience of discrimination: yes/no, situation experienced: yes/no, etc.). Various sociodemographic indicators were used as independent variables (gender: cis male/cis female, disability: yes/no, sexual orientation: heterosexual/homosexual/bisexual or multisexual/asexual spectrum, East German resident: yes/no, age in years, religion: other/Christian/none/Muslim; nationality: German/EU and Europe/other, origin of grandparents outside Germany: yes/no, obesity: yes/no, job-seeking: yes/no, self-assessment of social situation: more than enough/enough/too little to live on). An explicit inter-

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1 For example, in both surveys 55 percent of respondents experienced some kind of discrimination. In Saxony, slightly less cis women report experienced discrimination than in the rest of Germany (57 percent vs. 61 percent). For more details, see Kronenbitter et al. 2023.

action effect between age and gender was also included in the logistic regression model. We look at average marginal effects in the regression model.

The focus of the new analyses for this paper is on the intersectional experience of selected everyday discrimination situations. First, we look at how frequently discrimination and potentially discriminatory situations are experienced by persons reporting different sociodemographic characteristics and according to the intersection of age and gender. We selected this intersection because the quantitative results show that some effects are evident here and the case numbers are large enough to conduct an intersectional analysis. Due to the number of cases, the population survey can only differentiate between cis male and cis female. Relevant combinations of characteristics are analyzed to show multiple affectedness and to attempt a quantitative approach to intersectional discrimination.

3. Analysis

In a first step, we consider intersectionality by looking at experiences of discrimination. Here, we have two types of measurement methods at our disposal: first, direct questions about whether individuals have experienced discrimination in different areas of life, and second, specific everyday situation descriptions that may be discrimination but may also have other causes. In addition, we asked for detailed exact descriptions of these situations and other experiences of discrimination in open questions. In a next step, we evaluated these answers. Drawing on data about the consequences of experiences of discrimination, we then showed that the burdens of coping with discrimination are not evenly distributed within society.

3.1 Subjective Experiences of Discrimination

In research on discrimination in Germany, surveys often ask if people have experienced discrimination. In our survey, about half of the respondents report having experienced discrimination. Our results show that discrimination occurs in all areas of life, albeit with varying frequency. Discriminatory experiences are reported to have occurred particularly frequently in the workplace and in education. At the same time, there are differences according to sociodemographic characteristics, with certain groups reporting discrimination more frequently than others. When asked which characteristic they thought was responsible for the discrimination, respondents named age and outward appearance most frequently (45 percent and 48 percent; multiple answers were possible). However, the mere frequency of sub-

jective experiences cannot be directly equated with the actual experience of discrimination.

The relationship between subjective experience and actual experience of discrimination involves both overestimation and underestimation. Discrimination is overestimated, for example, when people from socially dominant groups complain about affirmative action and describe it as discrimination. Experiences such as unfriendly treatment perceived as discrimination or a rejected application may have other causes without the individuals being aware of it. More significant, however, is underestimation, including structural and mediated forms of discrimination, discrimination based on sociodemographic characteristics that are not legally protected, and other forms of discrimination often not recognized as such by respondents. Forms of discrimination that do not directly involve explicitly discriminatory justification can rarely be identified as discrimination by those affected by it.

Moreover, the proportion of people affected by discrimination says little about the quality and content of the discrimination. Thus, figures can only reveal who perceives discrimination more often or less often, but not how it differs qualitatively. This is a weakness for quantitative intersectional discrimination research, which is precisely concerned with how the intersection of discrimination-prone sociodemographic characteristics qualitatively produces new forms of discrimination.

Nevertheless, this data can at least shed light on the extent to which the risk of discrimination is higher for certain groups of people for whom multiple discrimination-prone sociodemographic characteristics intersect. The population survey shows that over half (55 percent) of the respondents have experienced discrimination in at least one area of life. There are no significant differences between cis women and cis men, but younger people, people with disabilities, and people who have at least one grandparent not born in Germany are significantly more likely to report having experienced discrimination than older people, people without disabilities, or people whose grandparents were both born in Germany (Fig. 1).

When the various effects are considered together, we find primarily additive effects and no interaction effects. That is, people who have multiple marginalized sociodemographic characteristics are more likely to experience discrimination. The coincidence of different forms of marginalization thus increases the likelihood of experiencing discrimination by the effects of the singular forms of marginalization, but there is no intersectional effect that significantly alters the pattern of singular effects. This means that for women with disabilities we find an effect on the probability of experiencing discrimination by both gender and disability, but no specific effect (interaction effect) of being female and disabled.
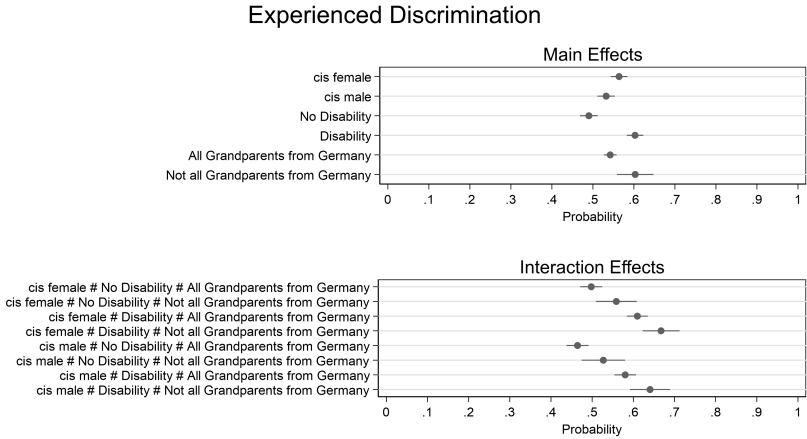
Experienced Discrimination

Figure 1: Probability to experience discrimination: Main effects of gender, disability, and grandparents (not) born in Germany and corresponding interaction effects.
Source: population survey

However, as our qualitative findings demonstrate, this does not at all mean that there is no intersectionality, but only that these effects are not detectable in the solely quantitative measure of whether a person has experienced discrimination or not. The open data clearly shows that people who are affected by multiple forms marginalization not only experience discrimination based on the individual forms of marginalization, but that these also repeatedly intersect to form independent forms of discrimination:

"I am a tall, curvy woman. Someone like me hardly appears positively (!) in media."

"As a German-Sri Lankan person of color and cis woman: not taken seriously, not listened to, not believed, lectured in everyday situations such as while shopping. Sometimes things are explained to me very clearly and several times, although it is very easy to understand, or I have not even asked. There is no possibility that I am considered to be German, too. At the same time, I am not recognized as Sri Lankan. I am stared at. I am ignored, picked last, sexualized, […] and so on."

3.2 Situation Descriptions

An innovative way of measuring disadvantageous experiences is through descriptions of everyday situations that are potentially discriminatory. These are used, for example, in the Daily Discriminations Scale (Williams 2022) or the Afro Cen-

sus (Aikins et al. 2021). In contrast to asking whether a person has experienced discrimination, awareness of discrimination or a common understanding of discrimination is less crucial here. However, the importance of the memory effect remains. People still need to remember situations in which something occurred. The more concretely a situation is presented, the higher the chance that people will remember having experienced it.

Below we present three everyday situations in which intersectionality could occur. As with experiences of discrimination, we are here only able to measure the frequency with which certain individuals face these experiences. This means that qualitative differences within experiences or specific descriptions of the intersectional entanglement of different discrimination characteristics remain initially invisible.

In many situations we examined, no significant intersectional relationships are found. This is partly due to the fact that the situations are formulated very broadly in order to be applicable to people with various discrimination-prone sociodemographic characteristics (for example, "I was treated worse in stores or restaurants than other people" or "I was insulted or ridiculed"). In general, it appears that as with the general question about experiences of discrimination, these experiences are reported less frequently by older respondents. Additionally, there are various individual connections between sociodemographic characteristics and the frequency with which situations are experienced (for a detailed explanation, see Kronenbitter et al. 2023). Since the situations are described very superficially, additive effects can be observed within the multiple regression model, but only rarely do interaction effects appear that could indicate intersectionality.

An example of a situation that we consider and in which an interaction between age and gender becomes visible is denied access to clubs, restaurants, and shops. Here, the data shows that cis men of a younger age experienced this situation significantly more often than cis women and older cis men (Fig. 2). For older respondents, there is no significant difference between cis men and cis women. Unlike in the most commonly studied forms of intersectionality, individuals belonging to a socially dominant group—cis men—experience this situation significantly more frequently.

At this point, we can refer again to the importance of the data basis for examining intersectionality. For example, we also asked about the situation "I was stared at." Staring can focus on deviations from societal norms, such as gender, body, and beauty norms, as well as, for example, on sexualization of bodies perceived as conforming to societal beauty ideals. Empirically, the basic pattern in the population survey is that with increasing age, it is less frequently reported to have experienced such a situation (Fig. 3). However, no difference is detectable between

I was denied access to clubs, restaurants or shops.
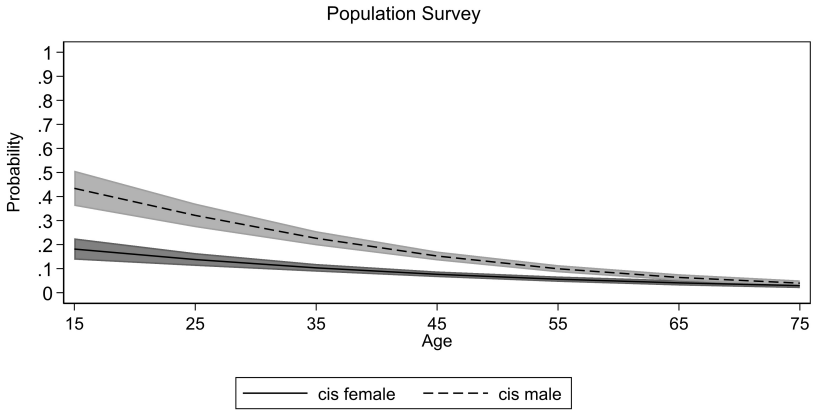
Figure 2: Probability of getting denied access to clubs, restaurants, or shops (by age and gender, including confidence intervals).
Source: population survey

cis men and cis women. Within the survey of people affected by discrimination, however, a significant difference is detectable between cis women and cis men in the age range between 25 and 50 years. The difference is even more pronounced for people who are non-binary, trans*, inter*, or genderfluid. They experience being stared at much more frequently. However, due to the small sample size of 114 people who experienced the situation and the sample being on average 10 years younger than cis respondents, the confidence interval is very wide, especially at higher ages.

Sexual harassment is the third situation we consider (Fig. 4). It becomes clear that cis women and younger people experience harassment significantly more often than older individuals and cis men.[2] In later life, the gap between cis men and cis women becomes significantly smaller but remains significant in the population surveys. However, the comparison in the survey of people affected by discrimination also shows something else. For individuals who are non-binary, trans*, inter* or genderfluid, the likelihood does not decrease with age. Although the confidence intervals are very large, there is still a significantly higher risk of sexual harassment throughout life. In this context, the sociodemographic characteris-

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2 In this article, we classify respondents in the population survey up to the age of 30 as "young," respondents aged 31 to 66 as "middle aged," and respondents aged 67 or older as "older people." These decisions were based on the retirement age in Germany and the fact that many people in their twenties are still in (higher) education.

I was stared at.

Figure 3: Probability of getting stared at (by age and gender, including confidence intervals).
Source: population survey and the survey of by discrimination affected persons

tics reported by respondents of the survey of people affected by discrimination as having been the basis for the sexual harassment are very informative for an understanding of intersectionality. Over 70 percent refer to gender, almost 50 percent to their outward appearance. Only about a third of the respondents also mention age. Therefore, intersectionality with age does not seem to be the focus with regard to how those affected by discrimination perceive the situation, even though it significantly influences the risk of experiencing such harassment.

Especially in the open descriptions of sexual harassment that we collected in the survey of people affected by discrimination, it becomes clear that other discrimination characteristics, such as body weight, sexual orientation, and racialization, interact intersectionally. Interestingly, we can only reconstruct this to a very limited extent in the quantitative data, which once again demonstrates the importance of qualitative methodological elements for investigating intersectionality:

"I am groped without my consent from behind at my waist and breasts. Following my verbal protest and pushing away, sentences were spoken like, 'I like thin people, don't worry. I just wanted to feel what it's like with fat people'."

"I was at the lake with my girlfriend, and we kissed. Two boys aged 13 came up and threatened us. "Are you gay or what?" "You're disgusting, I'll stab you." Despite the large age difference, I felt disgusting afterwards and was so angry that I didn't react well."

"People often ask you if you're better in bed than others. African-looking women are sexy."
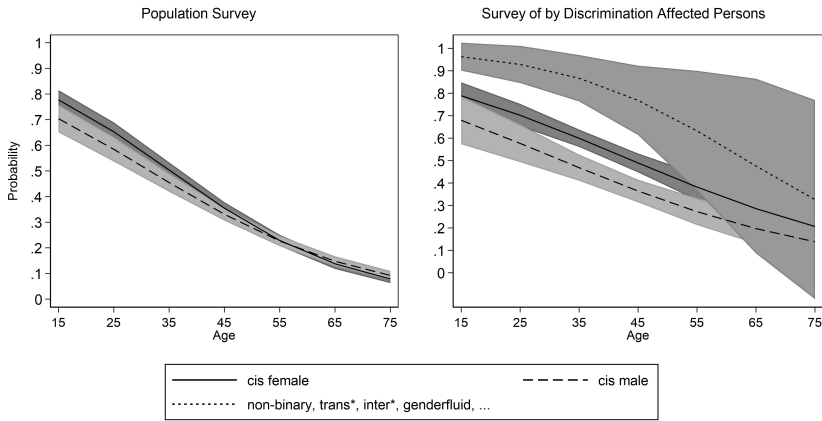
I have experienced sexual harassment.
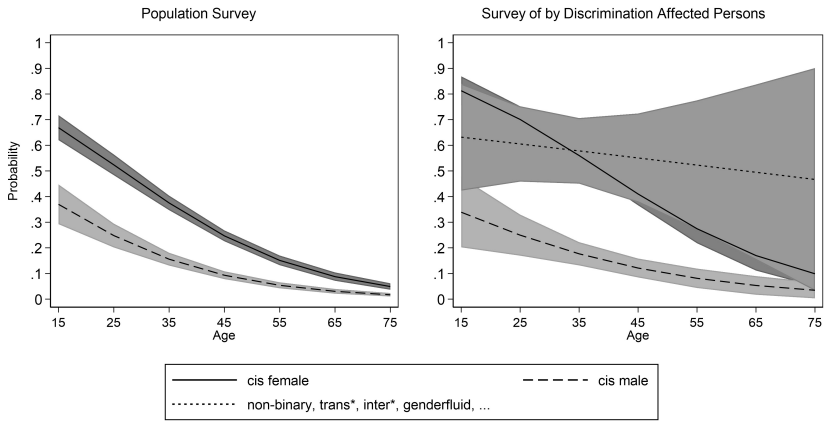
Figure 4: Probability of experiencing sexual harassment (by age and gender, including confidence intervals).
Source: population survey and survey of by discrimination affected persons

These quotations show examples of intersections between gender and three other dimensions: body weight, sexual orientation, and racialization. We can only show these qualitative examples to highlight these intersections because the numbers in our survey are too small for these intersecting analyses.

4. Strategies of Avoidance

After analyzing the varying frequencies of discrimination in different situations, we now evaluate to what extent entanglements of discrimination characteristics result in different consequences of discrimination. It has been shown that discrimination does not only impact the situation in which it takes place, but also has consequences beyond that (Pascoe and Smart Richman 2009). These consequences are material, but also affect physical and psychological well-being. Insofar as discrimination endangers social cohesion, the consequences also have a further impact. Not only do people who experience discrimination have fewer opportunities, but these disadvantages perpetuate inequalities through their psychological, physical, and material consequences, and they affect trust in the idea of a just society.

For this reason, we asked about the strategies individuals use to avoid discrimination. These strategies become self-limiting, as they prevent opportunities to do

certain things or to move freely insofar as doing so may decrease the likelihood of experiencing discrimination. These strategies of avoidance are both emotional, such as not telling anything personal about themselves and limiting social contacts, and physical, such as avoiding dark or lonely places or not going out alone at night.

Especially young cis women report negative emotional and/or health effects of experiences of discrimination (Fig. 5). These are also distributed differently by gender and age. For example, 62 percent of young cis women and 46 percent of cis men report feeling such negative effects at least some of the time. For both genders, negative effects decrease with age, with 18 percent of cis men over 66 years feeling at least some negative effects and 24 percent of cis women of the same age.
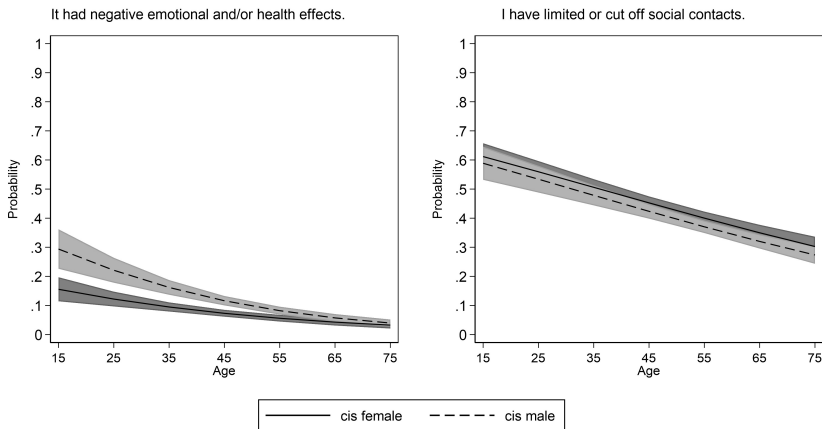
Population Survey

Figure 5: Probability of having negative emotional and/or health effects and cutting off social contacts as a consequence of discrimination (by age and gender, including confidence intervals).
Source: population survey

The strategy of limiting or breaking off social contacts or avoiding certain people is both emotionally and physically restrictive. The subjectively perceived need to do this is a direct expression of the lack of social cohesion and subsequently restricts social and political participation. Again, more cis women than cis men choose this strategy overall, and again, the effects decrease with age (Fig. 5). For example, over half (55 percent) of young cis women up to age of 30 say they avoid contact at least some of the time. Among young cis men, the figure is less than half (45 percent). Among older respondents over 66 of age, the two genders again

converge somewhat (31 percent of older women and 28 percent of older cis men limit contacts).

Another consequence of discrimination may be that individuals limit their range of movement. For example, especially cis women avoid dark and lonely places or do not go out alone at night. In contrast to emotional restrictions, gender effects override age effects in the case of physical restrictions. For example, 70 to 80 percent of cis women in all age groups report that they avoid dark or lonely places at least some of the time. Among cis men, less than half of respondents in all age groups report this. The situation is similar for the strategy of not going out alone at night to avoid discrimination. This is reported by about 35 percent of cis women in all age groups at least some of the time, while on average 28 percent of cis men in all age groups choose this strategy.

Interestingly, we see a u-shaped correlation of age and avoiding dark or lonely places (Fig. 6). Particularly young cis women employ the strategy of avoiding dark or lonely places. This initially decreases with age, but then increases again. Thus, older cis women employ this strategy more often than middle aged cis women. To show this u-shaped correlation, we squared age in the graphs for avoiding dark or lonely places and avoiding going out alone at night.
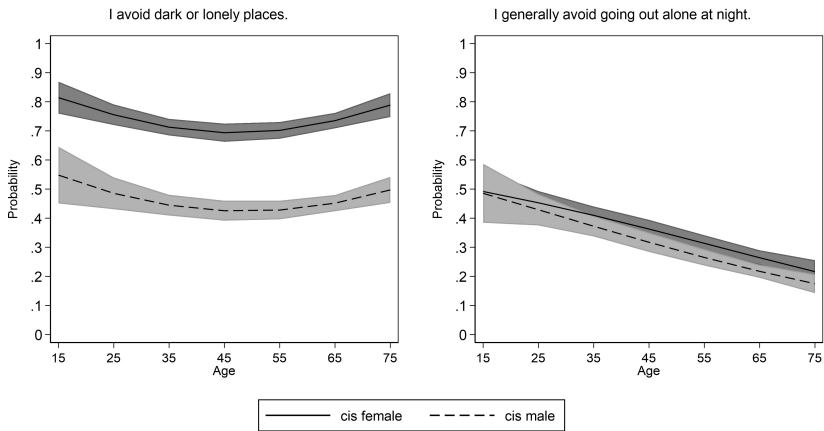
Figure 6: Probability of avoiding dark or lonely places and generally avoid going out alone at night as a consequence of discrimination (by age and gender, including confidence intervals).
Source: population survey

Overall, especially young cis women choose strategies of avoidance to avoid further experiences of discrimination. These avoidance strategies limit the social participation of the affected individuals to varying degrees.

5. Conclusion

Every second person says they have experienced discrimination. This is fatal for social cohesion, which is supposed to be based on solidarity and trust. The normative concept of social cohesion is based on fundamental equal rights. These guarantee every individual equal participation in society. However, from a critical perspective of discrimination research, it must be stated that this is often only an illusion. Societal structures such as racism, sexism, heteronormativity, ableism, classism, and others ensure that not all people have the same rights or can claim the same rights. While some are privileged and can develop their lives without discrimination, others are prevented from doing so by discrimination, exclusion, and devaluation.

The fact that inclusive social cohesion is a fantasy is also evident in the potentially discriminatory situations and effects of discrimination. If, for example, 18 percent of people in Germany have experienced sexual harassment in the last two years or 29 percent avoid dark and lonely places, this clearly shows that there is no solidarity and generalized trust throughout society.

A closer look shows that discrimination, discriminatory situations, and the consequences of discrimination are not experienced equally by all people. On the one hand, it shows that almost all people can be affected by discrimination based, for example, on age or religion. On the other hand, it shows that some people have a significantly higher probability of being discriminated against. These include, for example, people with disabilities or people whose family migrated to Germany. However, even though it is usually marginalized people who are excluded from social cohesion through discrimination and ideologies of inequality, privileged people are occasionally also affected by discrimination. For example, young cis men are more than twice as likely as young cis women to have experienced not being allowed into a club, restaurant, or shop. In this case, the overall dominant group may be particularly affected by discrimination, which is especially evident with the intersection with age as a further category of discrimination.

In general, the reality of discrimination contradicts the idea of social cohesion. However, hierarchical structures also exist within marginalization. When several discrimination-prone sociodemographic characteristics overlap, this can lead to independent forms of discrimination that are neither recognized by soci-

ety as a whole nor within one's own community. For example, we can document that cis women experience sexual harassment at a young age significantly more frequent than cis men or older women. At the same time, people who are non-binary, trans*, inter* or genderfluid have a higher risk of sexualized harassment throughout their life course. In terms of the consequences of discrimination, for example, it is evident that young cis women are particularly likely to use avoidance strategies that limit their range of movement.

Intersectionality therefore also means that certain experiences are more visible or less visible than others. There are prototypical perceptions of what sexist discrimination looks like, but these do not necessarily apply to the same extent to, say, older people or people who also experience racism. An exclusive focus on prototypical experiences does not acknowledge the lived realities of intersectionally affected individuals, nor are support and countermeasures designed to empower individuals who are affected by discrimination in this way. Thus, intersectionality also poses a broader challenge to social cohesion in a normative sense. Intersectionality implies a complexity of discrimination and thus also of struggles for recognition. This means that the expansion of social cohesion understood in a normative sense cannot take place exclusively based on the main axes of discrimination-prone sociodemographic characteristics and social structures, but must also consider the internal heterogeneity of marginalized perspectives. Only when social cohesion does justice to these as well can society come closer to embodying the normative concept of cohesion.

To understand this, we have gone beyond the question of discrimination and examined other indicators such as strategies to avoid further discrimination. As explained, discrimination directly reduces the life chances of those affected. But there are also indirect effects, as many affected people feel compelled to restrict their lives to avoid discriminatory experiences. The subjectively perceived need to use such avoidance strategies is, on the one hand, an indicator of the lack of equal rights and opportunities. On the other hand, avoidance of discrimination further promotes the inequitable distribution of life chances. When certain places or certain actions are unavailable, or unavailable at certain times, due to fear of discrimination or violence, affected persons do not have the chance to take advantage of the benefits associated with those places and actions and may have to take alternative actions that generate additional costs.

6. Discussion

Intersectionality uncovers power asymmetries in the comparison between different sociodemographically constructed groups of marginalized people. The analy-

ses thereby show that an intersectional approach is fundamentally necessary for discrimination research. In this context, intersectionality should not be understood merely as the intersection of different disadvantaging power structures. Such a perspective would assume that marginalized people normally experience discrimination according to only one sociodemographic characteristic, which is an assumption that can reproduce hierarchies. Our analyses indicate, for example, that male gender in combination with young age also increases the risk of certain exclusionary experiences. Nevertheless, the general risk of experiencing discrimination is particularly high when different forms of marginalization overlap. The lack of an intersectional perspective ensures that certain exclusionary experiences and their consequences remain unaccounted for and invisible. Thus, an intersectional perspective is also important for anti-discrimination policies, which will only be effective when different perspectives are considered.

Despite a comparatively large sample, we were only able to quantitatively map intersectionality to a very limited extent within the population surveys. This limitation relates to specific basic problems. First, it is necessary to have a sufficient size of the comparison groups for statistical evaluations. However, social minorities are particularly likely to experience discrimination. Because of this, many analytically novel and politically relevant intersectionalities, such as, for example, between refugee status and wheelchair use, cannot be captured within our survey. Even the groups of refugees and wheelchair users individually are too small to be analyzed, making it necessary for us to ignore the specifics of hostility against refugees in the multivariate analyses and examine them together with other immigrants and their descendants. Likewise, all people with disabilities are lumped together in an undifferentiated group in order to compute intersectional analyses. These problems largely extend to the survey of people affected by discrimination. Here, case numbers are sufficient to examine gender as cis female versus cis male. But they are not sufficient for smaller groups, such as trans women or wheelchair users. These problems could only be solved by even larger (and thus more expensive) samples with oversampling of marginalized groups and by more surveys within specific communities. Second, it is necessary for quantitative analysis to select the level of experience. Broadly shared experiences offer the possibility that they were experienced frequently enough to be analyzed in a differentiated way.

At the same time, the more broadly an experience is shared, the more difficult it is to work out the intersectional specifics. Broad descriptions of a situation thus resonate for many but are non-specific. Our everyday situation descriptions do not capture what exactly occurred in the situation, what was said, and how the situation played out in detail, but only the frequency of that broad situation. Thus, asking about the frequency of situations may reveal who is particularly threatened

by which situations. But it does not reach the core of intersectionality, which aims at the specific qualitative content of discrimination.

Nevertheless, quantitative intersectionality research is also needed to determine frequencies, to quantify, and to test correlations. Our article shows that discrimination and especially intersectional discrimination is a threat to social cohesion, as some people are more likely to be excluded from participation than others. Accordingly, such people face even bigger challenges in their fights for recognition. Social cohesion must first overcome these inequalities to evolve into the normative concept posited.

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"Bedürftigkeit" and Cohesion in the Activating Welfare State

Jennifer Eckhardt

Abstract

This article deals with a central German welfare category, "Bedürftigkeit", which determines whether a person is eligible to receive welfare assistance. The article examines its oscillation between a socio-statistical category, a societal category, and as an element of the basic constitution of human being. Based on a study on non-request of social benefits, it explains how the rise of activation policies successively replaced the figure of the social state citizen with that of an active citizen, one who can circumvent *Bedürftigkeit* by own efforts—if they only want it enough.

Keywords: welfare state; Bedürftigkeit; neediness; eligibility

The welfare state, as a form of governance, continually reshapes a country's socioeconomic care structures to be more inclusive (Kaufmann 2003, 39), playing a vital role in fostering social cohesion and development (European Commission 2023). However, a notable portion of people in need decline to take up social welfare assistance, potentially undermining the welfare state's positive goals. This chapter delves into the non-take-up of social benefits through a sociological lens, exploring its intersectional implications and its impact on social cohesion and inclusive development. The discussion draws from a qualitative study focused on the deliberate rejection of benefits, emphasizing the subjectivation of socio-cultural structures and knowledge-power relations that influence rejectors. It highlights how individuals' perceptions and decision-making processes are shaped by underlying social frameworks. These frameworks are critical in understanding the reasons behind the refusal of benefits. They reveal that the concepts of neediness and eligibility are central, functioning not just as a moral and socio-statistical category but also as a benchmark for those who decide against receiving aid (Eckhardt 2023).

In Germany, the welfare state is constitutionally anchored and features a multifaceted system of social policies. Its objectives include enhancing participation opportunities for marginalized groups, addressing life risks, and providing assistance in emergencies. To access support, individuals are classified as *in need of* and formally *eligible to* welfare. In German both words are combined in the adjective *bedürftig*. Moreover, this term also conveys the idea of being in a position of need and dependency aligning with the notion of vulnerability.

In a socio-political context, *Bedürftigkeit* holds a central role in the German welfare system. As studies show, a high number of eligible persons reject social benefits, a phenomenon known as the *dark figure of poverty* or *hidden poverty* (Becker and Hauser 2005; Becker 2015). Research has already pointed to unfavorable side-effects of non-take-up for the implementation of social policies, showing potential for social conflict and, furthermore, is linking non-take-up with a form of critique from the rejectors towards certain conditions of the social state and some of its subsystems. According to these analyses, non-take-up points to a lack of legitimacy of social policies and is read, moreover, as an effect of social disintegration (Tabin and Lereche 2016; Warin 2016; Goedemé and Janssens 2020; Lucas et al. 2021). Until now, the context of social norms and, more broadly, the sociocultural aspects of the welfare state have rarely been considered. As an empirical field, non-take-up and especially willful "non-request" (Warin 2016) could provide valuable insights as to the form in which the welfare state is culturally ingrained, how collective knowledge on the welfare state is produced, and how transformations come into effect. A subject-oriented perspective can reveal areas of action in the field of poverty reduction that would not be visible through a top-down ap-

proach. In particular, *Bedürftigkeit* as a knowledge-based societal structure with a long historical development can be viewed as a product of specific knowledge frameworks and institutionalized power dynamics. Analyzing this structure can illuminate contemporary societal positioning and inequality.

Connected to the lack of cultural perspectives in sociological research on the welfare state is the underrepresentation of intersectional views. Indeed, the field of social protection has many intersectional dimensions, such as differences in the availability of benefits for persons of different genders, with different social backgrounds, or the unequal distribution of pension benefits for older individuals. However, it remains rare to find intersectional perspectives on social protection, in the sense of an explicit focus on the interconnection between the production of the welfare state and the reproduction of social inequalities and different interdependent social categories (Götsch and Menke 2021, 163).

In this chapter, I return to my aforementioned study on the renunciation of welfare state support by formally eligible persons in Germany, reevaluating it with special regard to its intersectional implications on the one hand, and its effects on social cohesion on the other. First, in section one, I briefly present the underlying study and some selected findings. Second, I elaborate upon one main result, the *Bedürftigkeits-dispositive* and its historical formation alongside six lines of development, examining its intersectional implications with a focus on subjectively transported ideas of need and eligibility (section 2.2). The intersectional consequences and side-effects are then described in section 2.3. Lastly, based on the results, I raise the question as to what extent a rejection of *Bedürftigkeit* as a societal pattern is also a challenge for social cohesion and inclusive development, and to what extent an intersectional perspective might help to further understand these challenges1.

1. Study and Data

1.1 A Subject-Oriented Approach to Non-Request

The study employed an approach based on the sociology of knowledge to provide a subject-oriented and relational perspective. This approach combines elements from interpretative as well as social constructivist paradigms with insights from subjectivation analysis (Bosančić 2014; 2016) and dispositive abstraction. The study investigated how eligible individuals, considered *bedürftig*, position themselves in relation to the categorical assignments and impositions of the welfare system. It also explored how collective references to welfare state governance models and political regimes are reflected in their decision not to request

benefits. Additionally, the study assessed how these factors impact structural relations such as the interplay between present welfare paradigms, social identities and practices, particularly in the context of the transformation of the welfare state since the mid-1980s, and the shift towards activating policies in labor markets and social services. This transformation has not only reshaped the state-citizen relationship but also reconfigured public discourse on poverty and overhauled the social services system. To elucidate these interconnections, the interview study examined non-request as an empirical field, aiming to uncover needs for action in addressing poverty.

In a three-step iterative approach the research question (*"What dispositive-relevant structures become subjectivizing for people who reject welfare benefits?"*) was addressed. In detail:

1. *Biographical information* provided information on how knowledge of the welfare state (e.g. images of poverty and eligibility, categorical knowledge, legal reforms) is related to early socialization experiences (e.g. experiences of exclusion, poverty, discrimination). It uncovered external position assignments and self-positioning influenced by factors such as counter-cultures or youth subcultures (Bosančić 2016, 109).
2. *Operationalization of subjectivation* distinguished between subject-formation (through external addressings, positionings, and responsibilizations) and the appropriation and reinterpretation of these by individuals. It aimed to identify gaps between formation attempts and modes of subjectivation.
3. To reconstruct *dispositive constellations* rules and patterns of the institutionalized production and processing of meaning associated with need and eligibility were analyzed (Keller and Schneider 2020, 61). This also involved examining the opportunities and constraints on actions for the individuals engaging with these discourses.

1.2 Data and Mode of Interpretation

To ensure qualitative representation, the research employed a purposive case selection approach, guided by the principles of theoretical sampling as proposed by Glaser and Strauss (1967; 1998) and Strauss and Corbin (1990; 1996). The selection of interviewees aimed to reflect the heterogeneity of the field, aligning with empirical findings from previous studies on non-take-up. The sample was both theoretically pre-determined and evolved during data collection. Specific criteria were established in advance to guide the selection process. These criteria included active and ongoing or past episodes non-request of social benefits over a minimum

period of one year. Additionally, instances of partial refusal or the utilization of one type of social benefit (e.g. housing benefit) while abstaining from requesting another type (e.g. unemployment benefit) were considered. The interpretative approach to qualitative interview research, as outlined by Jan Kruse (2015), served as the foundational framework for data interpretation.

Finding interview participants was challenging. Success was eventually achieved by engaging relevant stakeholders in the field and through word-of-mouth recommendation. Ultimately, 11 semi-narrative, episodic interviews were conducted over three acquisition phases, with individuals between the ages of 20 and 69, from various socio-economic and educational backgrounds. The following table presents the interviewees' pseudonyms, information about the episode of their non-take up (i.e. for how long they reject(ed) and if the episode is in the past or still ongoing) and their self-description.

Table 1: Interviewees by date of interview

Pseudonym (sex, age)	Episode of non-request	Self-description
Viktor Leufers (m, 33)	Two years, in the past	Sociologist, research assistant
Lars Pulser (m, 34)	Two years, in the past	Graduated in theology, social worker
Marlene Dutte (f, 60)	One year, in the past	Housekeeper, volunteer, retiree
Suzanna Klodzig (f, 53)	One year, in the past	Untrained worker, looking for work
Manni Dennhorst (m, 54)	Every now and then over a period of 30 years	Car mechanic, typesetter, jobs at the theater (extra, lighting)
Anna Schnuck (f, 20)	Never claimed, eligible for approx. the last two years	Occasional jobs, voluntary work, Socialist Work and Life co-operative, Unionist
Paul Menners (m, 53)	Ongoing and every now and then in the past	Textile worker, volunteer, Socialist
Arno Thiel (m, 33)	Never claimed, eligible for approx. 10 years	Unskilled, occasional jobs, cannabis dealer
Jan Markowsky (m, 69)	Eight years, in the past	Energy economist, theater maker and pensioner
Andi Penck (m, 56)	Eight years in the past and partly ongoing	Outpatient mental rehabilitation, disability pensioner
Per (approx. 40–45)	Ongoing for approx. 15 years	Theater maker and craftsman

Source: author

It should already be noted, that although some dimensions of inequality are represented, others are not, which limits the study in general and especially the intersectional perspective. The sample does not include interviewees of color,

genderqueer or non-binary people or individuals with visible disabilities. Additionally, with the exception of one interviewee, those with (family) migration histories or refugee experiences are not represented.

1.3 Selected Findings

The biographical analysis reveals that individuals who refuse social benefits do so, in part, as a means of liberating themselves from perceived oppressive structures. Images associated with being a benefit claimant are often incompatible with the self-images and desires of non-takers. In exchange for autonomy, some individuals accept existential limitations on participation. How people deal with non-take-up depends on their personal predispositions, biographical events, and guiding principles related to concepts of justice, poverty, need, society, and order. Accordingly, non-request can, for instance, be traced back to an emphasis on personal responsibility in Western societies' early socialization. This emphasis implies that each member of society not only has the inherent capability to shape their own destiny through actions and choices but is also compelled to do so in order to avoid becoming a burden on society as a whole.

In further analysis on the modes of subjectivation, I identified five *patterns of rejection*: *the rejection of unbounded statehood*; *solitary distance from social welfare constraints*; *system-critical demonstration of alternatives*, and *artfully ascetic proof of injustice*. In section 2.2, these patterns will be re-examined in light of the inherent ideas of *Bedürftigkeit*. Across these patterns, it becomes evident that addressing individuals as *bedürftig* reinforces their positioning in terms of gratitude, whereby they are expected to accept responsibility for their living situations, endure impositions, and comply with all demands. The welfare state's norm of reciprocity demands self-motivated participation in all administrative processes, even when they are perceived as contradictory, nonsensical, degrading, or dehumanizing. Despite the social policy regime's general promotion of the autonomy paradigm, social benefits often demand the opposite from their recipients. The institutional constraints involved in claiming benefits therefore often clash with interviewees' cultivated self-reliance (Poferl and Schroer 2020, 170).

This fragmentation creates a lasting sense of contradiction, which individuals seek to avoid through non-request. Thus, non-request is also a method of expressing one's agency, and one's self-positioning in relation to the external world. By not taking up benefits, the interviewees signal that the means of power of the social state and its governance techniques are obsolete in their cases, maintaining a distance from the constraints individually associated with *Bedürftigkeit*. I identified these individual perceptions as the lowest common denominator in the inter-

view material and abstracted them into the *Bedürftigkeits-dispositive*. The following chapter briefly presents the cornerstones of this constellation and its historical development, to then lay focus on its intersectional implications.

2. The *Bedürftigkeits-Dispositive* and itsIntersectional Implications

2.1 The *Bedürftigkeits-dispositive*

Non-request is permeated by references to a dispositive constellation that can be described as a *Bedürftigkeits-dispositive*, which is based on the need to formalize and rationalize the thresholds of poverty in the transition to modernity in Western societies (cf. Eckhardt 2022, 289 ff.). As medieval and early modern European societies moved away from the pre-modern estate society with no formalized poverty relief, the pressure to find new ways of responding to poverty as a social problem emerged. Beginning with the 14th century Bubonic plague as a significant marker in this transition (Schäfer 2012, 265), along with urbanization, the increasing visibility of poverty in cities, and the various side effects of industrialization, there arose a growing urgency to establish a social consensus regarding who was entitled to access society's economic resources in times of need.

The measures put in place to achieve this could draw on a set of continuities that have manifested in the discursivation of poverty, need, and vulnerability since antiquity. In particular, the differentiation between the *worthy* and *unworthy* poor can be traced back to ancient Greece as a basic categorical structure concerning social images of who is allowed to claim benefits in the present day, who deserves them and who does not. I identified six lines of development that show the semantic changes in the *Bedürftigkeits*-discourse in Germany (cf. Eckhardt 2022, 22):

1. The *moralization* of poverty in the course of late medieval Christianization
2. The *institutionalization* of poverty and the disciplining of the poor in the early modern period
3. The *unmooring* of poverty from questions of morality, through the increasing perception of the 'industrious' poor and the communitization of risk through Bismarck's social security system
4. The *dehumanization* of the poor and the disappearance of welfare relief for the *Bedürftigen* under National Socialism, building on long-established basic ideas of 'racial hygiene' and efforts to dismantle the social security system

5. The *consolidation* of *Bedürftigkeit* as a legal concept at the time of the introduction of the Federal Social Assistance Act (Bundessozialhilfegesetz, BSHG, 1962) and during the economic boom after World War II

6. The *activation of the poor* under strict individual assessments of the applicant's need for assistance based on individual and/or members of the household's income and assets since the end of the "golden age" of the welfare state (late 1970s onwards)

The interview data reflects these narratives, for instance, in the differentiation between deserving and undeserving poverty, a sometimes general justification of punishing the poor, or the conviction that secure, full-time employment is the only legitimate path out of poverty, an idea rooted in the post-World War II economic boom and the mainstreaming of poverty discourse in mass media.

In the formation of the *Bedürftigkeits-dispositive*, it is evident that the institutionalization of poverty was accompanied by a gradual shift towards the determination of neediness thresholds through statistical means. Consequently, the granting of aid was no longer dependent on social relations, feelings, or religious convictions, but increasingly on the expertise of statisticians, economists, doctors, and bureaucrats, who became the ultimate arbiters of who was considered in need of assistance and who was not.

The emergence of the active citizen as a subject within society marks a significant departure from the traditional welfare state citizen who had a natural entitlement to social benefits. Active citizens are supposedly able to circumvent their own *Bedürftigkeit* by their own effort, if only they want it enough; all that is required to accept the opportunities and offers of participation that are available. The social figure of the benefit recipient who is theoretically capable of work represents the negative counter-image of the active citizen. They confront each other within the dispositive, whereby their figures are deployed in political, medial and everyday-discourse and in representing institutions and organizations. Non-request, therefore, functions as a way out of the dispositive and is associated with a multidimensional subjective freedom from the constraints that come with being categorized: freedom of movement, freedom to control one's own life, freedom from stigmatization and degradation, freedom from permanent threat and insecurity, and from the responsibilities that come with the imposition of being an active citizen (Eckhardt 2022, 296).

The following section zooms in on this dispositive constellation, with a focus on the rejection of social benefits as an everyday practice, and the concomitant subjective *ideas of Bedürftigkeit* from which the rejectors want to distinguish themselves. The descriptions already highlight some intersectional dimensions of the dispositive and their implications, which will be further examined in chapter 2.3.

2.2 Ideas of *Bedürftigkeit*

Initially, I derived three main ideas about *Bedürftigkeit* from the patterns of non-take up. In two of these patterns, which I have called *affirmation and rejection of un-bounded statehood* and *Solitary distance from social welfare constraints*, *Bedürftigkeit* is viewed as an incapacity and weakness. By contrast, in what I term *system-critical demonstration of alternatives* and *artfully ascetic proof of injustice*, notions of unfreedom and subordination are dominant. Lastly, within the pattern I characterize as *emancipatory insurance of human dignity*, *Bedürftigkeit* is closely linked to a perceived denial of human dignity.

Bedürftigkeit as Incapacity and Weakness

The interviewees who reject social benefits due to their desire for privacy, and a reluctance to disclose their financial situation, seem to exhibit an acceptance of the current welfare system and its emphasis on individual responsibility. They portray themselves as self-reliant and politically disengaged, and they do not discuss their non-take-up with their social circle. This pattern is particularly prevalent among interviewees who did not experience poverty during their upbringing. They adhere to a heteronormative, patriarchal family model that prioritizes gainful employment, stable full-time jobs, and debt-free living. They have had limited exposure to unemployment and have had no prior interaction with the bureaucratic unemployment benefit system before their own episode of need. Here, notions of unemployment are shaped by a subject figure that has become known in Germany, especially through mass media, as the *Hartzer*[1]: an inactive, indolent person whose life takes place on the sofa, where a specific TV program determines the rhythm of everyday life and the little money available is spent on unhealthy food, beer in plastic bottles, and tobacco. *Bedürftigkeit* in this pattern means being placed on the same level as the form of poverty they secretly despise, a life devoid of personal responsibility and meaningful activity. Being *bedürftig* means being addressed and positioned as incapable, without intrinsic motivation to work, and unable to fulfil the reciprocity-norm of the welfare state. The ethos of achievement is placed in the foreground. In this view, those who claim benefits cannot achieve much, and their contribution to society would be small, even if they worked. These people therefore receive benefits without being able to compensate the general public,

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1 The term "Hartzer" is derived from the German designation for unemployment benefits under Social Code II (Hartz IV, 2002, named after Peter Hartz, the chairman of the Commission for Modern Services in the Labor Market).

which legitimizes their marginalized position and makes inequality a natural aspect of society (Eckhardt 2022, 279).

Bedürftigkeit as Unfreedom and Subordination

Two patterns are marked by unconventional lifestyles, a rejection of authority, and a desire to bring about fundamental change in a society perceived as unjust and built upon discriminatory power relations. These patterns, labeled the *system-critical demonstration of alternatives* and the *artful-ascetic proof of injustice*, transform non-request into a discursive act infused with elements of political protest. The modes of subject-formation dominating these patterns are the obligation to be a productive member of the free market economy, to work, and to consume, in equal parts. Here, the welfare state is not rejected outright, but is seen as in need of fundamental reform.

In these patterns, the institutionalization and perpetuation of unjust social conditions through social policies is reflected and criticized, sometimes by living out an alternative, socially innovative life in new forms of solidarity, sometimes by inventing a completely new persona for oneself. For instance, one individual lived as a homeless artist for nine years, and another characterized themselves as a *dreamer for the greater good*, dedicating their days to helping others, while two more reside within a socialist self-help organization operating under an alternative economic system of monetary exchange. During the interview, one of the latter conveyed their message as follows:

"We show that solidarity exists. That you don't always have to be pushed around by society, by the authorities. They say that there is only this and that and anything else is not possible. This is more or less living proof here, I mean, the whole thing would have been flattened, [...] but somehow, we managed to do it. [...] It's crazy what you can do without money. We didn't have any for this." (Paul Menners, own translation)

These interviewees exhibit what can be described with Jane Mansbridge as oppositional consciousness, characterized by five key factors: "identification with an unjustly subordinated group, recognition of the injustice in that group, recognition of the injustice in the position of that group, opposition to that injustice, and recognition of a group identity of interest in ending that injustice" (Mansbridge 2001: 240). For them, relying on social benefits represents a fundamental form of dependence, subordination, and an affirmation of the very conditions they critique. Accepting benefits would undermine their stance, and their critique can only be potent if they reject these conditions outright and strive for an alternative way of life. Nonetheless, they overlook the inherent ambiguity in their choice

not to claim, as this decision arguably aligns with the activating welfare system's demands to take care of oneself.

Bedürftigkeit as Degradation and Denial of Human Dignity

The interviewees who experienced the most difficulty with non-request were also those who faced multiple dimensions of inequality in their personal situations. Within the context of the *emancipatory insurance of human dignity* pattern, non-take-up is perceived as a means of self-preservation against perceived degrading and discriminatory treatment, especially within the Jobcenters, the German public agencies responsible for administering and providing social benefits for the long-term unemployed. In this scenario, *Bedürftigkeit* becomes linked to a devaluation of one's life accomplishments and non-take-up serves as a means of reassuring oneself that one is a valuable worker, and not merely disposable labor. Older interviewees, in particular, struggled with the fact that they were expected to re-enter at the lowest rung of the job market when their unemployment benefits for the short-term unemployed expired after one year.[2] They feel disrespected and that their life achievements are not recognized. The language and messaging of the activation policy regime seem absurdly service-oriented, which does not correspond to the treatment they receive. This contradiction seems particularly challenging for those seeking stability and security in the face of unpredictable circumstances.

Significantly, this mainly concerns people who already live with limited participation opportunities due to physical or mental impairments and whose life stories are marked by multiple crises. They describe reaching a 'point of no return' where they could no longer bear the impositions of the welfare system. For instance, 63-year-old Mrs. Dutte, who grew up in an orphanage and spent her working life in 'unskilled' labor, shared the following situation which led to her non-take up:

Mrs. Dutte: Well, at that time my case worker, because she immediately … she told me that I had this and that and yes and then I was told, yes, then you are a freak.

Me: What did she mean?

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2 Following the onset of unemployment in Germany, individuals receive unemployment benefits under Social Code I for one year. Subsequently, the transition to benefits under Social Code II typically involves lower payments and stricter conditions, including stricter means-testing. After the 2023 reform (*Bürgergeld*), there are now exceptions for workers older than 58 years.

Mrs. Dutte: Jaaa, because eh, eh, I was supposed to go somewhere else so in shift work, so early and late and afternoons and, and evenings and so on. And then I said, no, that is something I can no longer, yes, because that is then …, that's too hard for me, yes. Yes. And then I left.

Me: And didn't come back.

Mrs. Dutte: Nah

2.3 Intersectional Aspects and Side-Effects

The interplay of social identities intertwined with constructions of race, gender, class, sexuality, (dis-)ability, and age, creates unique experiences of oppression and privilege that are also relevant to social benefit requests. For instance, gender discrimination and systemic barriers might particularly hinder individuals from marginalized ethnic groups in claiming support. People with disabilities may need accommodations to navigate bureaucracy, while ageism affects younger and older individuals, often in tandem with their socio-economic and educational backgrounds. Those with precarious immigration status may face complete exclusion from accessing benefits, alongside additional barriers.

The results have so far revealed the compounding challenges arising when dimensions of inequality intersect, as seen in the unique life experiences of older individuals facing mental or physical impairments or residing in precarious living conditions. These individuals, in contrast to others who were able to find alternative sources to earn a living, struggled to secure their subsistence during episodes of non-take-up.

In addition to these insights, the dispositive framework surrounding the social construction of *Bedürftigkeit* unveiled deeper implications, summarized below in a concise and provisional compilation. First, the dispositive framework highlights the importance of deconstructing hierarchical notions related to gender and other prominent power structures, in interrelation with the societal construction of *Bedürftigkeit* within the dispositive. Second, it briefly touches upon the accumulation of privileges, an aspect that has become increasingly clear in the course of the analysis.

Hierarchical Ideas about Gender: Bedürftigkeit as Weak, Non-Bedürftigkeit as Strong

Welfare state's attempts to form active citizens reproduce the idea of individual *Bedürftigkeit* as surmountable, and marginalized social situations as individual fate. From an intersectional perspective, the moralization of poverty particularly impacts individuals whose life circumstances are already influenced by various

factors contributing to social inequality. As they then see it, formal eligibility is partly a direct consequence of their personal attributes and, therefore, they are not able to change the causes.

Moreover, hierarchical ideas about gender, health, (dis-)ability and age are closely interconnected with the narrative of vulnerability as a characteristic of women, non-binary or genderqueer people, children, the elderly, and people with disabilities or chronic diseases. For example, women are, in the everyday, often considered to be more biologically vulnerable to certain risks due to physical characteristics assigned to them. This assumption of biological vulnerability can translate into social and cultural presumptions that can put women at a disadvantage, including a higher risk of poverty, domestic violence, sexual assault, and structural, including bureaucratic, discrimination.

In the data material, the negative connotations of *Bedürftigkeit* as vulnerability can be seen in practice amongst the female interviewees, as they seek to fulfill male-associated standards of behavior, even describing themselves in the masculine form as "good worker" [ger. guter Arbeiter] or "weeble" [ger. Stehaufmännchen], whilst demarcating other forms of work via association with female attributes. These interrelations can be traced back in the described *Bedürftigkeits-dispositive*, where two understandings of *Bedürftigkeit* are diametrically opposed: on the one hand, it is constructed as an inescapable human characteristic while, on the other, it is manifested as a socio-statistical category in social consciousness. While *Bedürftigkeit* as an anthropological fact implies an existential vulnerability and also a fundamental dependency, if used as a socio-political category, it becomes a situation in life that can be circumvented by acting on one's own responsibility. People whose opportunities for participation are limited by personal predispositions (gender, age, (dis-)ability) that correlate unfavorably with environmental factors, are particularly exposed to these contradictions. In order to be able to understand the historical and socio-cultural evolution of these conditions, further research efforts would be needed that explicitly focus on these.

The Cumulation of Privileges and the Demanding Life of Utopia

The *Bedürftigkeits-dispositive* further opens up the considerations of the cumulation of privileges, an often-underrepresented facet of intersectional analysis (Walby et al. 2012; Meier 2018). As a result, "creaming-the-poor-effects" (Miller et al. 1970), whereby the 'most promising' persons are given preferential treatment over those who have the least chances of (re)integration into the world of the non-indigent, become visible. This practice is reproduced through regular institutional action as well as by the architectural segregation of people with different educational backgrounds, and the acting out of power-relations and asymmetries in the or-

ganisations of the unemployment benefit system. Accordingly, people with the German university entrance qualification and a certain habitual closeness to their case workers did not report any direct discrimination experiences in the administrative system, whereas those with low or no school education reported having experienced blatant discrimination.

Furthermore, if non-request is a discursive element of an alternative lifestyle, this agency to personally extract oneself from oppressive circumstances can be viewed and analyzed in terms of its evident relationship to these aforementioned intersectional dimensions. Non-take up as a practice of rejection often arises from a belief that the existing system is inherently flawed or unjust. In response, individuals may envision utopian ideals or alternative social structures where the flaws they perceive are addressed and corrected. However, this agency would appear demanding, and it is contingent upon a multitude of factors. As we have seen, it is especially the multiple-marginalized rejectors who struggle to reach the conditions that might enable utopian thinking, direct action, or a sufficient feeling of empowerment to join an activist group. On the contrary, their life situations are often characterized by loneliness and depression. Accordingly, intersecting dimensions of inequality also seem to have some effect on the possibility of being resilient and/*or socially innovative* in the face of oppressive structures. Certainly, this point requires more research to further explore the connections between personal alienation/extraction, criticism, utopian thinking, social movements, and social innovation.

3. Rejection of *Bedürftigkeit* as a Challenge to Cohesion?

Financial social benefits are designed to provide a last safety net for individuals and families with an income below the poverty threshold, which makes them a central instrument of the welfare state. Without them, people would fall into poverty, existing inequalities would perpetuate, and new divisions and lines of exclusion would undermine social cohesion. When social benefits are inaccessible, the fundamental objectives of the welfare state come under threat. This pertains to the rejection of social benefits, which is the focal point of this discussion.

The dispositive abstraction showed how the institutionalization of poverty involved a gradual shift towards the determination of neediness thresholds through statistical means, with ultimate decision-making power resting in the hands of professionals. The rise of activation policies successively replaced the figure of the social state citizen with an active citizen, capable of overcoming dependency through their own efforts, provided they are only willing enough to do so. The illusion of the surmountability of *Bedürftigkeit* has thus become an integral part

of social consciousness, even before the implementation of activation policies. As a result, the welfare state's promises of inclusivity and a just social order remain the same, but social participation and inclusion are becoming more and more individualized attainable variables. Side-effects of these processes (i.e. the moralization of poverty, accountability for marginalized social situations pushed on to those who live them, new lines of moral exclusion, and fragmentations between welfare paradigms, policies, and multiple identities) are likely to affect social cohesion and its components, such as solid networks, shared values and identity, a sense of belonging, levels of trust and, especially, social inclusion (cf. Berger-Schmitt 2000; Koehler 2021). An intersectional perspective can be a valuable tool in deconstructing these interrelations by, for example, highlighting how the moralization of poverty and responsibilization can disproportionately affect marginalized groups, leading to a deeper understanding of their specific challenges. By uncovering societal structures from an intersectional perspective from below, systems of oppression could be better revealed and examined in terms of the concrete barriers they produce, which is, in turn, profitable when advocating for inclusive solutions. Especially in social policy, possible policy gaps might be better addressed, since it is evident that policies designed without considering the intersections of identities fail to address the unique needs of addressees.

One potential policy direction involves adopting a transversal social policy framework, as proposed by British sociologist Nira Yuval-Davis (2006). This approach integrates dimensions of inequality and discrimination into all policies, aiming to prevent disadvantages arising from multiple forms of discrimination. It calls for collaborative policymaking involving affected individuals, facilitated by participatory processes. However, implementing this approach also requires raising awareness among decision-makers about intersectionality and the importance of addressing diverse needs and experiences' in their decision-making, as well as the will to shift power-relations. This would provide the leeway for more equitable bottom-up approaches to poverty relief and social innovation. Adapting *Bedürftigkeit* as a category to this framework would demand legislative and socio-statistical changes in Germany. Nevertheless, to really address the dispositive structures as described requires additional, accompanying awareness-raising measures around poverty and the elimination of misconceptions and their media dissemination. Finally, the risk here is that an intersectional and diversity-sensitive policy of needs-based resource allocation could lead to conflict and tension as they could encourage the formation of interest groups and the fragmentation of society, rather than strengthening cohesion. It is therefore a field which requires high sensibility towards the present values and objectives of the welfare state,

without prioritizing the interests and needs of certain groups to the detriment of others.

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A Conversation about Communication-Based Marginalization in Everyday Life

Anne Stöcker, Yudit Namer

Abstract

Language and communication reflect, promote, and facilitate power structures in general, including discrimination and marginalization. Although this in well known, discrimination based on language or communication is rarely targeted in legislation (Ng 2007). In this chapter, we attempt to highlight the omnipresent but rarely tangible consequences of everyday communication-based marginalization for social cohesion. The concept of social cohesion has become more popular, particularly in relation to dangers to it. However, social cohesion in a positive manner, as lived and experienced, is characterized by a sense of belonging, trust, and participation in a certain group (e.g., Green and Janmaat 2011), all of which are conveyed through communication. In this chapter, we address communication in everyday life as a condition for social participation and cohesion. We call attention to marginalizing mechanisms and cohesion-promoting examples, illustrating possible and realistic, communication-based ways to substantially reduce or eliminate marginalization in order to facilitate a more cohesive society. We conclude with recommendations for more inclusive and cohesive communication practices.

Keywords: communication; marginalization; cohesion; exclusion

A Joint Beginning

In each society, there are normative expectations to mastering a certain (dominant) language. In contemporary Western Europe, it is also obligatory to be verbally conversant in a given language in order to fulfill role expectations as a member of a socially cohesive group. The conditions for success are linked to intersectional mechanisms. For example, when migrants and/or persons from lower socioeconomic status are not given opportunities to acquire a language proficiency or mastery. In addition, there are ableist ramifications: being non-verbal places one lower in societal hierarchies than being verbal. As such, intersectional communicative marginalization or exclusion has tangible consequences with respect to social inequality, which may, for example, manifest as lower educational, political, and social participation and restricted access to healthcare. Socially marginalized positions pose individual challenges, but they also result in threats to societal cohesion, both for the persons directly affected, but also on a macro-level.

Anne: With respect to social cohesion and given our backgrounds in social minority groups, we wanted to address language- and communication-based discrimination as a potential threat to inclusion and cohesion, as it can be "legal camouflage for other forms of discrimination that are in themselves unjustifiable in law or in terms of human rights" (Ng 2007, 108).

The idea for this chapter emerged in a conversation about verbal vs. non-verbal communication. We thought it would be a good idea to engage in communication ourselves, in order to trace how we try to make sense of each other's arguments and language.[1] Thus, we begin by sharing our understanding of communication.

Yudit: I think it's really striking that we started this recording session with a small miscommunication and the subsequent repairing of that miscommunication. For some reason, I thought we had scheduled our meeting on a different day. Our solution was to meet, but because our intention was to meet, we met each other halfway (earlier than I and later than you expected), and to ensure that the miscommunication be repaired.

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1 We recorded a spontaneous conversation on Zoom. We had prepared a short list of guiding topics we wanted to address. After transcribing the conversation, each edited her part. For example, we added literature, but also took the liberty to omit private sections and add content that was missing. Our last step was to revise it following the peer review process.

Communication

Yudit: At the core of my understanding of communication is the intention to communicate, not necessarily the modality of communication or the duration of communication. I am always interested in the intention. Sometimes we communicate to get a different perspective, sometimes to be heard by someone else, and sometimes it's a matter of practicality. But when I am thinking about communication, I focus on the intention behind it.

Anne: That's a great point. From my perspective, successful communication often goes unnoticed when it is working well but becomes a focal point when it fails. Maybe the intention cannot be realized, the conversational rules are not met, or a conflict occurs (Hitzler 2018). Maybe barriers to communication arise and cause lack of access for some groups. When this happens, such groups can become marginalized, communication becomes exclusive rather than inclusive. In these situations, it is important to identify and address barriers to ensure that communication remains open and accessible to everyone. Without accepting of diversity and inclusivity in communication, there cannot be social cohesion (Arant et al. 2021; Stöcker and Zurbriggen 2023).

Yudit: This brings me back to intentions. Is the intention perfection, that is, to say what you mean in a perfect way? Is the intention to dominate, or to force the other person to communicate in a way that you want them to communicate? Or, is the intention to learn about what the other person has to say? I think if it is the latter, a genuine curiosity, it is so much easier to achieve inclusion. When the intention is self-centered, that is, when you want to communicate but you are not interested in the other person's perspective, you only want the other person to hear about yours, I think that's when communication becomes exclusive. When you center yourself in the communication you exclude the other.

Anne: Maybe we can clarify normative expectations of communicative capabilities?

Yudit: First of all, you have to be able to speak orally, with sound and articulation. Then you must speak the native language of that country and do so perfectly (Ng 2007). Writing may come next, but even if you are a great writer, if you are not able to articulate the writing in oral speech, then you are automatically immobilized in society. Your options become limited. If you are not able to orally speak a language, most people assume that you have no competence in that language at all, even when you can understand it and/or you can read and/or you use a differ-

ent way of communicating in it, but simply do not speak it for whatever reason. With all these skills that we have, we still feel like ghosts. Most people do not identify you as an agent who can comprehend and make decisions, unless these are verbalized. When you are a ghost, you are automatically excluded.

Anne: From her perspective as a disabled woman being reduced to her wheelchair, Judy Heumann says:

"They weren't even ignoring me; I could tell by the way they looked right through me. They just didn't even register my presence. It was as if they unconsciously categorized me as a nonentity" (Heumann 2020, 31).

Marginalizing Mechanisms

Anne: Now we already have the case of being a ghost and being excluded. But other, less absolute processes can occur beforehand. When one speaks in ways others find to be unclear, or when one is only understood by one's family, they are often perceived as lacking cognitive competences, unable to make important decisions. This is true for people who suffer from conditions such as aphasia following a stroke, for example. A consequence of damage to parts of the brain controlling expressive or receptive language (or both), this language disorder hinders effective communication with others, impairing speaking, writing, and/or comprehension. Depending on when in their lives this condition arises, people may have already established themselves as capable actors and their surroundings may know of their abilities. But miscommunication or marginalization can still occur (Emry and Wiseman 1987), leading to assumptions of incompetence and the denial of their right to express their own thoughts, feelings, and wishes. Unfortunately, stigmatized and marginalized individuals can also be perceived as aggressive or confrontational when rightfully attempting to voice their opinions, because their expressions do not meet the general expectations of "appropriate" behavior for members of a certain ascribed category, leading to a further breakdown in communication (Haubl 2015). Such marginalization can become dangerous, even deadly for the communicator when they are Black, Indigenous, or persons of color.[2]

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2 Magdiel Sanchez, a Deaf and non-verbal man was fatally shot by the Oklahoma City Police in 2017 (Associated Press in Oklahoma City 2017).

On the other hand, a misunderstood political correctness can cause marginalization in communication. While there is tremendous value in being mindful of our language and avoiding language that is hurtful or exclusionary, insofar as discrimination also occurs through linguistic encoding and enactment (Ng 2007), in some cases we should prioritize open curiosity and a willingness to ask questions and seek understanding. Often, people who have disabilities or differences are open to questions and may even welcome them as an opportunity to educate others. It is when others become defensive or are prevented from asking questions that exclusion and misunderstanding can occur. For example, a colleague who uses a wheelchair is always very, very open to children asking him about it. They can even touch the wheelchair. It's that problems occur when the parents think this is offensive, and they hold back their children. This small communicative detail leads to exclusion and to two opposing positions in communicative settings.

Yudit: In your example, when parents hold their child back, they are actually saying that this person is not communicable. This is what I hear: you are not free to communicate with a disabled person the way you are able to communicate with a non-disabled person.

Anne: Very often, people with certain disabilities are not addressed directly. People talk to their company or assistants instead, and don't give them the opportunity to answer for themselves. Sometimes people, and in this case, the parents, may be uncertain or insecure about how to communicate with someone who is different from them, which can lead to avoidance or exclusion (Emry and Wiseman 1987). It is ironic, because, as you mentioned, simply talking and engaging in open and constructive dialogue can help break down these barriers and foster greater understanding and inclusion.

Yudit: This brings me back to intention. If you want yourself or your child to have the experience of knowing someone, you find a way. You can for example ask the person: "I really want my child to get to know you, how do I do that? What would you recommend?" There's always a way to communicate. I think sometimes this is a manifestation of a form of exclusion on a societal level: people can be fearful or anxious about making a mistake, which I think is more prevalent in certain cultures than others. Being open to making a mistake and repairing that mistake shows the other person that they are worth knowing. It shows that the person is a "concrete" rather than a "generalized other" (Benhabib 1987). In that sense, repair is a fundamental component of social cohesion. I think the fear of making a mistake and subsequently refraining from communication can send the mes-

sage that some people are not worth all this trouble. Which then makes me think: maybe the intention to communicate and know someone is not so strong.

Anne: It would require recognizing the other as an equal, as a human being, and overcoming the hierarchy or the supposed higher position of someone who may be native to the country or not disabled, among other things. Additionally, it takes a certain level of vulnerability and humility to recognize and acknowledge the experiences and perspectives of those who may be marginalized or different from oneself. It requires us to step out of our own comfort zone and challenge our own assumptions and biases. And it's true that it can also be risky in terms of social status or perception. It can mean realizing that causes for marginalization are an imminent possibility of life and everybody can experience them (Emry and Wiseman 1987; for disability Haubl 2015).

Yudit: Cohesion and inclusion take work. Sometimes it is extra work, but it should be worth it.

Anne: We have seen that exclusion can happen through avoidance and lack of intention. These are not even concrete language barriers, but conditions to engaging in communication. This can happen both verbally and non-verbally. Capabilities like being able to speak, to hear, read, and write in a language provide access to general communication, rather than merely figuring as an object of it. Language in general is also a symbol of power and hierarchy. As such, legitimized languages used in a society are crucial, insofar as language minorities, including people communicating in sign or non-verbal languages, can experience marginalization. We do not only mean sign languages, although they sure experience marginalization, but also persons using assistive technologies or gestures to communicate. Such marginalization in everyday communication can result in or stem from a lack of representation in societal macro structures (Ng 2007). This can even prevent representation in historical accounts.

Yudit: One way I have seen this manifest is with regard to how diversity is measured in certain historical settings. For example, an innovative method is to go back to school records and see how many languages were spoken in that school (Kemper and Supik 2020). This method assumes two things: that children speak one language at home, or that a language is *spoken* at home. Not all households are speaking households, or certain households speak a language they're not necessarily comfortable sharing due to forms of persecution. Sometimes a language is directly tied to an ethnic identity, and it is not safe to disclose that ethnic identity. Sometimes languages are homogenized as part of one linguistic family even

though they are different from each other in terms of grammar, history, region. For example, Kurmancî and Soranî are both Kurdish languages, but they have different alphabets, grammatical structures, and histories, to name a few differences. So, this is another way we don't become aware of certain histories, when there is just no way of knowing whether a form of communication existed or not.

Anne: Apart from the historical dimension, it is crucial to include marginalized perspectives in political and societal discourse. We need to pay attention to experts in their own fields, for example in participatory research or in the mainstreaming marginalization (e.g., regarding disability or gender). But as you mentioned earlier, it requires effort and hard work to ensure inclusion and find common ground among diverse perspectives. This would enable cohesion among all. It's much easier to exclude others and maintain the status quo.

Yudit: It is work that people are either not willing to do, or that systems make it really difficult. Being exclusive does not require extra thought, you can simply do everything the way you have always done. If you are not from a marginalized group, then there will probably be no negative consequences for yourself. This implies that a lot of the responsibility lies with people who have privilege (Lépinard 2020). I know this requires a lot of convincing as people with privilege are fine living their life the way that they have always done, so why should they change anything?

"The truth is, the status quo loves to say no. It is the easiest thing in the world to say no, especially in the world of business and finance. But for the first time we were discussing civil rights, and no other civil rights issue has ever been questioned because of the cost" (Heumann 2020, 152).

Anne: Regardless of personal opinions on inclusion, it is important to acknowledge that basic human rights, regardless of abilities or differences, have been established since 1948 (Universal Declaration of Human Rights; United Nations 1948). However, it is unfortunate that the UN has had to create additional conventions to address the marginalization of certain heavily marginalized groups (e.g., the Convention on the Rights of Persons with Disabilities, United Nations 2007). If we were to fully respect these human rights, we could build a more inclusive and cohesive society where individuals do not have to fear being marginalized due to unexpected circumstances.

Yudit: Welfare states, discussed in another chapter of this book, also come with a lot of burden on people to prove that they fit a certain category. For example,

you have to prove that you are disabled and "disabled enough"[3] in order to bene-fit from specific measures. In this sense, requirements themselves can reproduce what they intended to ease.

Society teaches us that we have to conform and do not have the right to ask questions or make requests. Asking for accommodation means you are taking up space. If you are asking for an interpretation, you are actually taking a lot of space in the room. For example, when my own need is to be in a quiet place or to reduce sensory input, such as light, I rather take less space, so I tend to exclude myself rather than making myself vulnerable and sharing my needs with people. I am never sure how people will respond to my requests for accommodations. Many times, I have excluded myself from participation because I was not sure how much space I would be allowed to take.

Anne: I would say it's an interactive situation. If you anticipate that it will not be welcomed, you hold back in order to avoid creating conflict and getting hurt (Emry and Wiseman 1987; Haubl 2015). On the one hand, there are structural barriers and discrimination linked to intersecting dimensions that make it almost impossible for some people to participate and thus to belong. On the other hand, people may also have their own internal barriers, which might not be a problem if they were in an ideal situation. For example, people may not be able to communicate on a cer-tain day, but in an ideal society, they could just say so, and their request would be respected. However, since we do not live in an ideal society, people often establish their own protective barriers.

Yudit: Because you have to ask. It is not ingrained into the system. You are always asking for an exception to be made in your case. You can never simply be: "Today I'm just not speaking" or "Today I am communicating by writing". The burden of explanation is by itself a form of exclusion.

Anne: Nor is it part of inclusive communication, nor does it allow to be cohesive. Heumann (2020) shares your experiences. As you mentioned earlier, people often feel the need to justify themselves in order to avoid being discredited in some way. It's unfortunate that some may question the validity of others' barriers, assuming that they're just excuses. This is an unfortunate assumption that needs to change.

Yudit: I think that this assumption you mention stems from the lack of under-standing in the mainstream of how marginalization is multilayered and inter-

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3 We thank Julia Gspandl for pointing this out to us.

sectional. In this book, there is a comprehensive discussion on intersectionality (Ashour and Holz) so we encourage the readers of this chapter to read that chapter first. But in terms of communication, the intersectional aspect of marginalization can be quite visible. Certain markers of identity, such as migration history or socioeconomic status, can already carry stigma and lead to fewer opportunities in life, which manifests intergenerationally. Such complex identities and trajectories are typical in modern societies (see Arant et al. 2021; Ng 2007). We have previously discussed how stigma prevents learning from the experiences of others (Namer and Razum 2021). Often communication is part of the resulting stigma. Majority communities use certain non-mainstream articulation and minoritized vocabulary that groups use as weapons in order to delegitimize these groups as knowers, rather than viewing these as linguistic richness. Add to this layers of gendered communication and communicative (dis)ability and you get a very complex picture of how communication becomes a tool of marginalization. García-Sánchez (2016) also writes about this marginalization occurring within unequal structures, power, and everyday practices.

Anne: Communication is not limited to language, as García-Sánchez (2016) demonstrates as well. Communication includes diverse forms of expression. In a very broad sense, someone may be ostracized for wearing clothes that are different from the dominant culture, or for bringing food from their own cultural background. In a more focused understanding, subtle practices and language of discrimination can become normalized and turn into a routine in everyday discourse (ibid.; Ng 2007). These forms of social exclusion and discrimination can have serious impacts on wellbeing, mental health, and experiences of pain and stress (Büttner et al. 2022). Such barriers are a pervasive issue for marginalized groups in all aspects of life. It can be seen when a person is unable to access certain opportunities, like inclusive schools or the labor market (Powell and Pfahl 2019). They can even impact something as basic as finding an apartment in a foreign country, where one's name or background can prevent them from being considered. They can limit opportunities and create a sense of not belonging that can affect all aspects of one's life, including self-expectations and the willingness to explore new experiences and environments (Powell and Pfahl 2019).

Yudit: See, a poorer life because of it. It just takes so much away from you. You shrink. It has so many other consequences.

Anne: It's interesting to note that even in multilingual countries, power structures still exist. There are still certain languages that are associated with power, education, and societal status (Ng 2007). The beautiful atmosphere of multiple lan-

guages may, however, only persist superficially. Even when more languages may be permitted, alternative forms of communication are often not included.

Yudit: But isn't multilingualism a wonderful thing, when you are in school and there are so many students who speak so many different languages? Or communicate in so many different ways other than speaking? Such richness in a schoolyard! How could this be interpreted negatively? A lot of my friends who grew up in Turkish-speaking households in Germany say that they were not allowed to speak Turkish in the schoolyard, some informally in terms of discouragement, some formally in terms of punishment. There is even a court case on this issue (Moody 2020). My parents grew up in a time when languages other than Turkish were not allowed to be spoken in Turkey. Still today, non-Turkish communities do not have any rights to learn their native languages. It is also dangerous to speak any language other than Turkish outside of your home because it shows that you are not ethnically Turkish. I have partly lost my native language because of this. I just think how much you lose in your life by just not having the opportunity to be multilingual or communicate in a multitude of ways. We could all have had a richer life but now we do not.

Inclusive and Cohesive Communication

Anne: You already refer to multilingualism being a benefit of inclusive communication. What other arguments in favor of inclusion, inclusive communication, and inclusive cohesion come to mind?

Yudit: My answer is that there is so much richness that can come from knowing a person who communicates differently than you do, or who sees things differently than you do. Knowing a person who communicates outside of the mainstream is not a service performed in the interest of inclusion; it is simply an intrinsic part of a richer, better life. I sometimes think people who are not marginalized consider inclusion to be a duty, or the right thing to do rather than a part of living a better life.

Anne: I would go as far as saying, even economically, the society would benefit. Investing in education and inclusive workplaces can benefit the economy in the long run. While some may argue that special education or accommodations are costly, it is important to consider the high cost of sorting and attempting to reintegrate marginalized individuals into society. In Germany, there are currently many job

openings that remain unfilled, and further education and training can help individuals to take on these roles and contribute to society in practical ways.

Yudit: When I think about the economic arguments I'm also thinking: so what if it costs more? Let's say that states spend more money on disabled communities than non-disabled communities. Let's say it costs more money to foster special education. What if it actually costs more money to give healthcare to all the asylum seekers than not? It's still the right thing to do. What is the purpose of having money?

Anne: Absolutely. There are many people who would benefit if we spent money on things like providing adequate support for marginalized communities or investing in education and training programs. Investing in inclusive communication would be a rather easy measure in favor of "increasing neutral and positive intergroup contact, particularly in socioeconomically weaker communities [...] to secure the social cohesion of [...] societies" (Arant et al 2021, 10).

Being included would be a condition to cohesion (Stöcker and Zurbriggen 2023). And cohesion on various social levels would contribute to quality of life. While there are dangers of highly cohesive societies, especially with respect to the exclusion of others, by adding inclusion to the goal of cohesion, we could strive for "happier, healthier and emotionally more stable individuals" (Arant et al. 2021).

Yudit: It is baffling to me why anyone would not want to be in a space where someone isn't forced to communicate with you, or where someone is using a communication method that is most comfortable for them. Everyone should be given the opportunity to communicate in their preferred way. I do not mean that people who use dominant forms of communication and don't demand inclusive communication for everyone are intentionally exclusionary. Because of how forms of communication are hierarchized, non-dominant forms of communication are not accessible to everyone. For example, sign language is not taught as an elective in every school. However, I do believe the demand for inclusive communication should be shared and raised by everyone, so that everyone has an equal opportunity to communicate with one another, regardless of whether, what, and how they speak.

Anne: Like in the ideal inclusive education, where resources are available to all depending on current needs, we could create an ideal system in which many different means of communication are available and equally rightful. For instance, if you had to go to a certain agency, there could be little symbols and checkboxes

indicating your preferences, such as if you prefer to be contacted by phone, email, or in person. Maybe there could also be options for those who require assistance or have a hearing aid that requires certain accommodations.

It would be so helpful if we could establish practical measures, such as ramps that should be available everywhere, handrails that extend the full length of stairs to prevent falls, and language that is easy to understand.[4] We should train our officials to communicate in a more sensitive and culturally aware manner, also when dealing with individuals who require assistance. There are many aspects that we could implement to make society more inclusive and accessible, without requiring individuals to prove their disadvantaged status and reproducing it at the same time.

Yudit: If the structure itself is not inclusive, then we are relying on people to practice inclusion. For services to be inclusive, the structure itself should be inclusive, not only individual service providers. Rather than investing in sensitivity trainings to non-disabled officials, why not hire actual disabled people who are officials? Then they actually are the ones who are providing the service and leading by example. Not that I am suggesting segregation in services, but people already feel included when they find their own people in service roles.

Anne: Yes, that's an important point. Inclusion is rarely thought of with respect to roles of authority. It is mostly reduced to recipients of services or clients. When will dozens of teachers or healthcare providers come from marginalized perspectives? When will they no longer face marginalization?

Yudit: But there is usually a hierarchy of communication, and you need to have a higher communicative status in society in order to inhabit these roles.

Anne: As we already mentioned, it's important to acknowledge that inclusion and other forms of normative agreements are civilizational achievements. We should not hesitate to celebrate them. Thanks to our formally established human rights, we can now have discussions on how everyone can be included and how society can be more cohesive. We can use this opportunity to explore how we can include everyone who wants to be included.

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4 Accessibility to many products and services throughout the European Union will have to be secured by 2025 at the latest, as regulated in the European Accessibility Act currently coming into force in the European countries. The demands target private companies and include easy-to-understand language.

Yudit: This requires efforts to include various languages, assistive technologies, and different groups' participation in the design of certain spaces. Such efforts could be affordable in our institutions and countries. It is an active choice when they don't do it.

Anne: And not only that, but when we design for the most marginalized and excluded members of our society, we end up creating more inclusive and user-friendly products and environments that benefit everyone. For example, closed captioning can be used by millions of people who watch videos in noisy environments or in quiet spaces where they don't want to disturb others. Similarly, curb cuts were initially created to assist people in wheelchairs, but they have since become an essential feature for anyone using a stroller, bicycle, or rolling luggage. Making technology and services more accessible can have far-reaching positive impacts.

Inclusive communication is not only about accommodating specific disabilities or language backgrounds, but also about recognizing that people have different learning styles and preferences. By providing multiple forms of communication, we can ensure that everyone has equal access to information and can fully participate in society, without having to out themselves in any way.

Yudit: As long as we make sure that there are different ways for people to participate. I do research with heterogenous linguistic groups without formal translators/interpreters, and I always get asked: how is that possible? Where are the translators? I always have to explain that work does not have to happen in spoken language and that we also don't have to speak with each other in the same language even if we are speaking to each other. Many people have passive language skills that are not recognized at all.

Anne: I must admit that I don't have much experience in groups that don't share at least one language to some extent in this area. Recently, however, I discovered just how insecure I felt when attempting to learn a new language at my age. I'm afraid of making mistakes or forgetting things altogether, which makes me hesitant to even speak up among those closest to me. Successful communication despite language barriers is an experience that not many people share, so please share stories of these experiences and illustrate ways in which we can communicate effectively despite seemingly insurmountable obstacles.

Yudit: I can think of so many different examples where I communicate by gaze or stare, yet I communicate. Some facilitators of communication do not necessarily

have to be translated, and therefore they do not need to be formalized. For example, in the research setting, you can bring a friend you trust who understands the language and then informs you about what is happening. You can communicate using summaries; you can have interpretation circles where one person who speaks two languages sits in a corner and conducts this informal kind of interpretation; you can have one person visualizing the discussion for others to see. When a person displays an emotion, for example when they cry, it does not have to be spoken. You take in the emotion, you accept the emotion. Not every form of communication is cognitive or conceptual. We communicate other things to each other as well. Research does not have to be conceptual and cognitive. Sometimes it is enough to share a space and an emotion. Then you come with one emotion you leave with another emotion. Isn't that a form of valuable exchange?

Anne: As you previously mentioned, the intention behind communication is crucial for its success. Your experiences reflect what communication should be about, understanding one another and respecting everyone's voice. This is not about preserving power structures and taking the easier route. Communication can work under inclusive conditions with flexibilized expectations (Hitzler 2018). Then, insecurity and avoidance can give way to reducing anxiety and getting to know one another, a more cohesive society (Arant 2021; Haubl 2015).

I would like to emphasize the relevance of respecting a preferred or chosen mode of communication or language. Language should be viewed more broadly than solely as speech. For instance, I recently learned more about the Deaf community and the choice of many of its members to solely use sign language, even though they may be able to use spoken language. Unfortunately, people are often unfamiliar with alternative forms of communication, such as assistive technologies like a talker or a tablet that can voice out loud. Those who use these devices take pride in being able to make themselves understood, but it may be uncomfortable or strange for those who are not accustomed to it. However, there are established and effective ways of alternative communication that could be normalized, including assistive technologies. Even laptops and computers have countless functions these days, which is truly incredible.

Yudit: There has to be openness to it. A few times, in spaces where I was among those benefitting from interpretation circles as a listener, other people shushed us because the informal interpretation was considered too noisy. Even listening becomes normative. When I am not able to follow the language though silence, it is not possible for me to understand it. I have to create noise. I know that interpretation circles are not necessarily assistive technologies, but it's a form of as-

sistance, a community technology. Often, organizers do not use this community technology. At any given conference, for example, you would have many people speaking many languages who are also happy to facilitate an interpretive circle. You do not need a budget, or you do not need organizational skills to make this happen. All you have to ask is: "How many people speak A in this room? How many people speak B? How many speak C?" And they organize the room: "OK, this is an A circle, this is a B circle, this is a C circle." See, we just made it happen, it's a little noisy but now we all understand each other. Of course, there should be standards and accessible professional translation available. Translation should not be an afterthought. But in situations where resources are scarce, creativity should be employed rather than discarding the opportunity to be inclusive.

Anne: I love this idea, and with a bit of humor, I would say that the intention of understanding each other can sometimes be disruptive to social situations, which can be intimidating to people.

Yudit: It gets noisy, it gets messy, it gets uncomfortable, but this is okay because it is inclusive.

Recommendations

1. Inclusion of diverse forms of communication and preferences should be a fundamental component of a theoretical framework of diversity. This would entail recognizing and valuing all modes of communication, including sign languages and non-verbal communication.
2. Practitioners in fields such as education, healthcare, and social services should actively seek to understand and incorporate alternative modes of communication based on individual preferences and needs. This could involve providing assistive technologies or training staff in non-verbal communication methods.
3. Awareness-raising campaigns and training programs should be developed to educate the public about the importance of inclusive communication and its impact on social cohesion.
4. Policies and guidelines should be established to promote inclusive communication in public spaces and workplaces. This could involve providing materials in multiple languages, accommodating individuals with disabilities, valuing non-verbal communication, and opening all roles to marginalized groups.

5. Research and development should be encouraged in the field of assistive technologies and alternative forms of communication, with a focus on reducing barriers to communication and promoting social inclusion.

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Deaf Migrant Signers: Social and Structural Marginalization and Opportunities for Cohesion in Austria[1]

Julia Gspandl

Abstract

For deaf migrants, different social identities intersect: as minority language users, as migrants, and as people perceived as disabled. Deaf migrant signers are minoritized in society and marginalized in research. The study presented here provides preliminary insights into how new migrants to Austria who use sign language have been in contact with and integrated into the Austrian deaf community (ADC). Based on semi-structured interviews conducted by a deaf signer of Austrian Sign Language (ÖGS), the chapter considers the reported experiences of twelve deaf migrants in Graz, Austria with respect to past and present social and structural experiences and issues of social cohesion. While reports highlight participants' experiences of discrimination by hearing individuals in particular, in terms of deaf peers, it can be seen that the high degree of social cohesion that is known to be typical of the ADC also extends to signers who are new to Austria who show high degrees of perceived unity and shared values. In fact, many deaf migrant signers may identify more strongly with their deafhood than their country of origin.

Keywords: deaf, migration; disability; deaf community; marginalization

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Deaf migrants represent a unique but heterogeneous group in migration research who face a number of linguistic and social challenges upon arrival in Austria. As minority language users, migrants, and people perceived as disabled, they are both minoritized in society and marginalized in research (Sivunen 2019). To date, few studies have focused on the experiences of deaf migrants, and these have been restricted to countries other than Austria, such as Australia (Willoughby 2008), the United Kingdom (Emery and Iyer 2021) and Scandinavian countries (Holmström and Sivunen 2022). This chapter provides some first insights into the social challenges faced by signing deaf migrants in Austria. It explores factors of social cohesion within the group of deaf migrants, within the Austrian deaf community (ADC), and within Austrian society as a whole. The study is part of a wider research project about the social and linguistic experiences and practices of deaf migrants in Graz, Austria. Study participants are characterized by heterogeneous linguistic and social backgrounds, but they are all users of sign language and have been in contact with the ADC. The data analyzed here is based on semi-structured interviews conducted with twelve deaf migrants by a deaf signer of Austrian Sign Language (ÖGS) using interview guidelines specifically designed for this purpose. Participants were asked about their life and experiences concerning language use before and after migration, starting with childhood. While the wider research project's primary aim is not to explore these social challenges and aspects of cohesion, the interviews presented themes pertinent to this subject matter in the participants' own reflections of their backgrounds, their journeys to Austria, and their challenges and experiences regarding integration into Austrian society. The analysis laid out in this chapter seeks to answer the following research questions:

– What positive and negative experiences have participants gone through as minority language users and/or deaf/disabled migrants?
– What factors of social cohesion do participants report and how have various factors shaped their integration into the ADC and Austrian society in general?

After translation into German in ELAN in a process carried out and double-checked by a native ÖGS signer and the author (a non-native ÖGS signer), the data was coded and analyzed in MaxQDA by the author to identify the themes discussed in the following sections. Additionally, two deaf native ÖGS signers rated the functional (general) and formal (ÖGS-specific) signing skills exhibited by the participants during the interviews using an adapted version of the Sign Language Proficiency Interview (e.g., Caccamise and Newell 1995). "*Functional* signing skills" refers here to signers' general ability to communicate using sign language resources, while "formal signing skills" refers to their proficiency in standard, formally "correct" ÖGS.

1. Deaf Migrants in Austria: A Heterogeneous Group

The participants of this study are all deaf individuals who have migrated to Austria and live in the Austrian province of Styria. The opportunity to participate in the study was openly communicated through various channels, including deaf clubs and service points for migrants, as well as online via the web and the social media platform Instagram. However, most participants were recruited through shared deaf contacts or the members of the research team themselves. There were four requirements for participation. The participants had to be:

– adult migrants from another country,
– deaf or hard of hearing,
– users of a sign(ed) language, and
– able to give informed consent.

Due to the these very open selection criteria, the ensuing sample of deaf migrants represented a heterogeneous group in terms of linguistic and ethnographic background as well as hearing aid use. The participants were seven women and five men from different regions (all UN geoscheme regions of Europe as well as South Asia), various age groups (between 23 and 65 years old), and of diverse socioeconomic backgrounds. They also had experienced different ideologies of (sign) language use throughout their lives, both in their country of origin as well as during and after migration. At the time of the interview, some participants had been in contact with Austrian-born ÖGS signers for many years (up to 22) either because they had been living in Austria for this long or because they had acquaintances or family members in Austria and had visited before. Others were first exposed to ÖGS only four months prior to the interview, when they moved to Austria due to the 2022 Russian invasion of Ukraine.

As there is no census data or systematic statistics on deaf migrants (or in fact deaf signers in general) in Austria, this study is the first collection of data on the languaging practices of deaf migrants in Austria. Assuming the statistical average of a deaf population of 0,4 % for the Western world, approximately 298 functionally deaf migrants are expected to live in Graz alone. With twelve participants, the wider research study outlined here thus covers around 4 % of the deaf migrant population of the city.

Concerning language backgrounds, the participants' language socialization, competences, and preferences of use are shaped by family situations and education as well as the linguistic norms and ideologies of their countries of origin. Participants either used a national sign language which may or may not be documented and/or standardized, a local or ethnolinguistic sign language variety, or *home signs*, that is, new sign systems with little standardization that arise between

the members of a family. Some are familiar with written language(s), more con-
ventionalized International Sign (IS), or forms of ad hoc IS. Deaf education in par-
ticipants' countries of origin ranges from oralist or Total Communication tradi-
tions over models of bimodal bilingualism to sign language focused approaches.
This sample of participants is assumed to reflect the linguistic diversity found in
the overall population of deaf migrants in Austria.

Anecdotally, deaf migrants quickly pick up the sign language of their new
country of residence. General statistics on (mostly hearing) migrants in Austria
show that 21.2 % report to possess only basic or no German skills. In contrast,
none of the participants in this study estimate their own ÖGS skills to be this
low (however, see Section 4 for possible biases), and 9 out of 12 participants even
describe themselves as proficient in ÖGS (75 %). This number is higher than for
migrants in general; out of these, 54.4 % describe themselves as native or fluent in
German (Statistik Austria 2022). Of course, self-reported language skills may not
necessarily be accurate. For the present study, the ratings by two native ÖGS sign-
ers thus add to the reliability of the results. For functional signing proficiency,
the lowest rating of any participant was intermediate (the third best rating in a
six point scale). Of the migrants describing themselves as proficient, none were
rated lower than level B2 in ÖGS on the *Common European framework of reference*
(CEFR; Council of Europe 2001). To the author's knowledge, there is no data from
hearing migrants that could be compared to these results. However, the level
required for Austrian citizenship is B1.

Participants also vary according to the nature of their migration: four partic-
ipants relocated as part of forced migration (asylum), while the rest made a deci-
sion to migrate to Austria either to (re)unite with their partner (five participants)
or for social, economic, or infrastructural reasons (three participants). Even in
cases of family reunification, moving to Austria was typically also a practical deci-
sion: Graz/Styria was considered a good location for deaf individuals in economic
terms (offering work opportunities for deaf people), infrastructurally (offering a
school for the deaf), and socially (offering a supportive network of local deaf peo-
ple). Despite these advantages, deaf migrants also faced linguistic and social chal-
lenges upon arrival in Austria, as described in the following sections. First, learn-
ing an additional spoken/written language, in this case German, requires extraor-
dinary effort for this group; secondly, deaf migrant signers face not only potential
issues of racism but also *audism*, that is, discrimination based on deafhood (Sec-
tion 2), while navigating situations that deaf locals may face (Section 2.1). Despite
these challenges, the majority of the participants feel a sense of belonging in the
ADC (Section 3.1) and exhibit two characteristics of social cohesion, social attrac-
tion, and shared values, as discussed in Sections 3.2. and 3.3.

2. Marginalization of Deaf Migrants

Discrimination and marginalization are common experiences for deaf individuals in many regions of the world and across different socioeconomic statuses. While many countries position themselves as promoting inclusive societies and indeed have made many advancements in terms of deaf rights, forms of marginalization persist in almost all societies. These are apparent in the reports of participants of this study, who recount experiences ranging from maltreatment by authority figures, such as teachers, civil servants, and parents to feeling uneasy about signing in public:

"I was bullied. A lot. [...] When I was little, I felt afraid and ashamed. When my uncle was there, I would sign in secret." [P03: 05:14–05.21]

Such experiences of marginalization may become exacerbated during times of crises. For example, one participant recalls the following doctor's visit in Austria during the Covid-19 pandemic:

"I went to the doctor one time. I asked him: 'Please, take down your mask. I don't understand anything.' But he kept talking with his mask on. [...] I almost cried. [...] In the end, I received the information in writing. He really did not understand why he should have taken the mask off. It's the same with so many professions." [P07: 36:38–37:20]

This instance happened despite pandemic-era legal protection in Austria (among other countries) which allowed individuals to remove their face masks in communication with deaf people. Similarly, while many sign languages have been granted legal recognition, (hearing) members of the mainstream society may not be part of this change of mindset due to a lack of awareness or information:

"The perception is that signing is like bulldozing your way through a space. Because of that, men say—people say that the deaf are difficult people." [P08: 07:09–07:15]

During their school-based education, seven out of twelve participants were expected to lipread and focus on learning a written language. In these contexts, the attitudes of teaching staff varied from allowing the students to talk among themselves in sign—but not signing themselves—forbidding sign language use in the classroom altogether. Such ideologies are often connected to the belief that sign language use threatens "spoken" (or written) language acquisition[2] and that knowledge of the national language of the majority is more important than ac-

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2 In fact, we now know that the brain is likely made to be multilingual (see Perniss 2018), and that preventing a deaf child from acquiring a signed language amounts to "putting at risk their cognitive, linguistic, and personal development" (Grosjean, 2008, 144).

cessibility or diversity. In such cases, social cohesion is used as an argument for linguistic assimilation.

Discriminatory experiences of participants can sometimes be read as a merging of different dimensions of stigmatization, that is, as negative consequences of intersecting identities. For example, one participant from Romania recounts staying in Italy for several months before migrating to Austria. Describing experiences of marginalization during this stay, she says:

"In Italy, the people were different, quite unpleasant. Deaf people were treated condescendingly. That's why I left again. The Italians hate Romanians. They are at war with us." [P09: 19:00–19:10]

These negative experiences related to both hearing and deaf agents. Joining her then-partner's deaf club in Italy, the participant also recalls difficult encounters there:

"[At the center for the deaf,] the people were pleasant. It was only that our opinions were so vastly different, so it was not a good fit. It was important to me that I got along with his friends as well. But the hate against Romanians made everything worse." [P09: 20:01–20:08]

Romanians make up the largest ethnic community in Italy (Caritas 2010). While the participant makes sure to point out that there were also members who defended her, "discrimination and social exclusion, often enhanced by the language used in the public discourse" are key problems afflicting the Romanian community in Italy (National Report: Romanian immigrants in Italy 2012, 4). She not only felt condescension on the basis of her deafhood, but also resentment due to her nationality. Thus, the participant felt marginalized even within the deaf club—which is often considered a safe space of mutual understanding (Atherton 2018).

2.1 Inequality of Access to Resources

One particular aspect of marginalization can arise in the course of the administrative processes that are required to access certain legal rights and protections in Austria. For the province of Styria, sign language interpreters are generally subsidized by the state for both work-related and private matters. However, before deaf migrants can request such interpreters, they need to provide evidence of their disability and receive an official certificate of disability (the Disability Identity Card). During this process, a doctor appointed by the Federal Ministry of Social Affairs must assess the person's degree of disability—usually based on existing medical

findings or reports. However, medical findings in the written language of the applicants' country of origin are of no use here.[3]

Thus, for some participants, the process of receiving disability recognition proved difficult. For example, at the time of the interview, one participant says that they are still waiting for documents from their country of origin in order to acquire the certificate and are therefore not yet able to request interpreters. Another participant who also did not have a Disability Identity Card at the time of the interview, describes the process as follows:

"I got in touch with the government office responsible for Disability Identity Cards and they told me to please wait until the COVID period is over. So for now I am waiting for the restrictions to relax. Then in the future, this will be handled and maybe then I will get it." [P08: 28:54–29:07]

Even during times of stricter Covid-19 pandemic-related restrictions, however, provisions were in place allowing for government offices to be visited in accordance with regulations. Thus, what this participant recounts may not in fact be what the civil servant intended to communicate. This demonstrates the irony of this process: how can one navigate the administrative process of acquiring a certificate of disability if one is only allowed accessible information by way of a state-funded interpreter *after* having managed to successfully apply for the certificate without one? Here, the deaf migrant participants highlight the important support they receive from their partners, friends, and family members—both deaf and hearing—who act as lay interpreters. While this support is generally described as a positive experience by all participants (with exceptions: one participant calls it a "big burden"), having to rely on such help may not be without issues, as exemplified in Participant 01's interview:

"At government offices, [I communicate] through my sister. She sits beside me and communicates with them. I don't understand but I sign [the documents] anyway." [P01: 40:20–40:35]

For one participant, issues concerning his certificate of disability were an additional challenge while he pursued recognition of his professional qualification, which in itself is a challenging process for many migrants (Statistik Austria 2022).[4] The reasons that prevent some deaf migrants from pursuing their original careers once in Austria are manifold. Some are purely preference-related; others concern different challenges deaf migrants face. While one participant

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3 Currently, eight EU countries use the EU certificate of disability, which is based on a system of mutual recognition of a person's status of disability and certain corresponding services. Based on the success of this system, the European Commission is planning to—by the end of 2023—suggest use in all EU countries, which may alleviate this situation, at least for deaf migrants from the EU.

4 73 % of migrants in general completed their highest degree of education abroad, typically in their country of origin. However, only 13.3 % apply for recognition of their qualifications (see Statistik Austria 2022).

reports not possessing the required German competencies, others merely found it difficult to find work in their original field at first and thus decided to go into "unskilled" labor. As for potential reasons for this, one participant mentions issues of audism:

"It was very difficult to find work as a [job designation]. [...] Because of the complicated communication and the fact that I cannot hear the machines, I was frequently rejected." [P06: 13:19–13:32]

In total, ten participants reported changing their field of work after migration. As two participants were too young to work when they left their country of origin, this leaves only one participant who stayed in the same profession after migration. An interesting aspect of this is that five out of the twelve participants reported being qualified for jobs which are formally classified as shortage occupations in Austria, while another two work in fields that have a shortage of proficient signers. The Austrian government attempts to alleviate such labor shortages with a flexible immigration system ("Rot-Weiß-Rot-Karte") that facilitates access to the labor market for skilled workers of understaffed professions from non-EU countries. However, communicative barriers and bureaucratic processes, among other things, have prevented several qualified deaf migrants from pursuing these occupations in Austria.

2.2 Institutional Support in Austria

At the same time, the study's participants report on many positive experiences with government officials and institutions in Austria. For example, one participant recollects first arriving in Vienna, Austria, and being offered prompt assistance via an interpreter:

"A friend asked for me how it works here for deaf people. The police officers were understanding, put down my deafness in a form, and organized an interpreter who asked me a lot of questions." [P06: 16:54–17:03]

Many participants also express approval and a special appreciation of the *Gehörlosenambulanz*, a walk-in clinic for the deaf. Similarly, several participants praise the legal system in Austria as fair and non-corrupt, for allowing a "free and self-determined life in peace" and facilitating communication and an independent life for deaf individuals, among other things.

Participants also mention positive experiences with workplace support programs by private non-profit organizations, such as the *Arbeitsbegleitung or workplace-accompaniment service offered* by the NGO alpha nova and the *Arbeitsassistenz* or

workplace-assistance service provided by the NGO Jugend am Werk Steiermark. Three participants remarked that the interpreting provided by these assistance services facilitated communication and familiarization with colleagues and the workplace, while one participant referred to this support as a source that helped him learn ÖGS.

The only participant who did not know a sign language before migrating to Austria shared her gratefulness to be in a country that provided her and her family with the support necessary to learn to sign. Recalling her negative experiences in the country she grew up in, she says:

"I never ever understood anything, just nothing. I wasn't happy. It wasn't good. Now that I've fled to Austria and I found sign language, I learned a lot and now it's much better. My parents know sign language. I'm getting a lot of support. I'm really grateful to be here." [P01: 38:30–38:49]

This participants' experience contrasts that of Hawa, a participant in Emery and Iyer's 2021 study who recalled that after migration, she "would just sit in the class with no idea what was happening" while in school. This account is similar to how several participants in the present study characterize their compulsory education before migration. It is vital to note here that the policies on deaf education have since changed in Austria. The deaf school that the participant cited above attended no longer has deaf classrooms. Instead, deaf children have been mainstreamed into hearing classrooms by policy changes labeled as efforts of "inclusion". Thus, in the province of Styria, deaf education has changed course and is now closer to the educational measures of other countries, even as there is data showing that mainstream schools are poor social environments for deaf children (Mathews 2017, Chapter 2).

3. Social Cohesion within the Austrian Deaf Community

Generally, deaf communities are considered to exhibit high degrees of social cohesion (Christiansen & Barnartt 2003). The solidarity among members of a deaf community is frequently expressed through mutual aid (Atherton 2018). This was a theme in many participants' accounts of navigating the early challenges of migration to Austria. Deaf partners, friends, and family members acted as lay interpreters at government offices, in restaurants, or even during the interview for this study, as in the case of Participants 11 and 12.

Social cohesion in and between deaf communities is exemplified by the phrase "deaf-same" which denotes a shared experience of being deaf, even across great geographical distances. Friedner and Kusters (2015) describe deaf-same as a "widespread (if not universal) phenomenon"—based in shared sensorial, social,

and moral experiences—that emphasizes the feeling of "deaf similitude" ("I am deaf, you are deaf, and so we are the same" 2015, X). Likewise, the notion of a *"deaf diaspora"* has been discussed (notably by Allen 2008; and Emery 2015) in which deaf-same experiences play a key role. Such ideas are central to social cohesion within deaf communities. The following sections provide evidence for a sense of belonging (3.1), social relations (3.2), and shared values (3.3) as three factors associated with strong social cohesion.

3.1 Sense of Belonging in the Austrian Deaf Community

A sense of belonging and identification with a group is considered to be a key element of social cohesion.[5] Participants in the present study shared a sense of the "deaf diaspora" mentioned above. Nine out of twelve participants are active members of formal deaf clubs. Participants also report meeting deaf friends outside of club activities, expressing an appreciation for the ease of communication and "deaf similitude" shared in these encounters. Some participants also refer to "deaf groups," rather than formalized deaf clubs. In the following discussion, the term "deaf club" indicates all regularly-occurring meetings of deaf people in a given town or region, whether or not the group had an official club with formalized membership or a specific gathering place or was founded or run by deaf people.

Identification with (a) sign language is at the core of deaf communities, as is apparent in certain statements of participants in this study:

"I am deaf, so spoken language is of no use to me. Sign language is my language." [P04: 04:28-04:30]

At the same time, deaf communities are also defined by their outgroup. The negative experiences with hearing individuals, such as doctors or teachers, may result in a lack of cohesion for deaf individuals as part of the majority (hearing) society (see Section 2). Such issues may be exacerbated for deaf migrants due to the inequality of access to resources discussed above. This can lead to feelings of alienation, as expressed by Participant 07:

"Hearing people will never understand deaf people." [P07: 34:45–34:57]

In addition to the general deaf community in Austria, one participant from Hungary also reports on a community of deaf individuals who migrated from Hungary to Austria and sign Hungarian Sign Language (MJNY) among each other. During preparations for the interviews for this project, members of the Austrian deaf

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5 For a theoretical conceptualization of social cohesion, see the 2017 review by Schiefer and van der Noll.

community (personal communication in 2020 and 2021) mentioned this community to the author as potential participants who may be hard to reach as they "keep among themselves."

Not all study participants engage with deaf clubs in Austria. Two participants cited a lack of time due to work and mentioned having both deaf and hearing friends. However, these participants still identify as deaf and consider sign language their primary mode of communication. Only one participant did not identify herself as deaf but hard-of-hearing and also reported on minimal contact with the Austrian deaf community. Although born to deaf parents, spoken language development was prioritized by her parents for her school education. She is also among the participants who reported that as a child, they did not believe sign language(s) to be language proper, and who cited spoken German as their current language preference. For the most part, whether or not participants are members of a deaf club or consider themselves part of the local deaf community is connected to whether they did so in their country of origin. The exceptions are two participants who both used to attend deaf club meetings but no longer do so, as is one participant, who was raised orally but now attends a deaf club in Austria.

Besides the Austrian deaf community, signers also report relationships with hearing Austrians such as work colleagues or friends. However, there are few mentions of relationships with other hearing migrants from their countries of origin. One exception was a participant who mentioned that he had regular contact with hearing people from his country of origin (Hungary) at work. There is a fairly large community of migrants from Hungary in Graz due to geographical proximity. However, many of the other participants would be unlikely to meet someone from their country of origin without specifically seeking them out. With regard to migrants from Ukraine, who were a growing demographic in Graz at the time of the interviews, participants from this country only reported on contact with a group of other deaf signers with whom they had migrated, as well as with hearing and deaf Austrians.

3.2 Social Relations: Deaf-Same as a Catalyst for Romantic Relationships

One key factor of social cohesion are social relations and interpersonal attraction (Friedkin 2004; Schiefer and van der Noll 2017), which can be defined as the desire to form a friendly or romantic relationship with somebody. Positive interpersonal ties are the basis of continued group membership (see Friedkin 2004). For deaf individuals, this can mean having a deaf signing life-partner with whom they can, for example, participate in deaf club activities or raise children according to shared values. Social attraction can be mediated by similarity (of interests, out-

looks, psychological, or physical attributes) and can result in "assortative mating" (Goddard 2012), that is, the tendency to choose romantic partners who have similar phenotypic characteristics as oneself—such as deafness.

There is a lack of research on cultural aspects of deaf individuals' romantic and life partnership preferences and how deaf individuals construct social relationships in general. Research on interpersonal attraction involving deaf individuals often focuses on deaf-hearing relationships and school settings (see Kluwin, Stinson and Colarossi 2002). Studies on "assortative mating" (i.e., deaf-deaf relationships) are typically concerned with genetic factors in offspring (notable exceptions are Feldman and Aoki (1992) and Mudd, de Vos and de Boer (2020), who focus on cultural transmission and sign language persistence).

In the study described here, all five participants who migrated to Austria to (re)unite with their partner have a deaf partner with whom they sign. Two participants who migrated for infrastructural and economic reasons, also have signing deaf partners. Interviews included little talk about how these partnerships were formed, as participants were not asked about the subject of why they chose their partner. However, several participants mentioned the importance of having a deaf signer as a life partner, and Participant 07 even cited communicative difficulties as a major reason for divorcing her previous husband from her country of origin and remarrying a deaf man from Austria with whom it was easier to communicate. Considering these comments and the notion of deaf-same, it may be argued that—although migration is involved—the participants in the present study have entered relationships with partners with the same or a similar cultural background more so in terms of shared deafness than in terms of an ethnic, national, or regional affiliation.

3.3 Shared Values: Cross-Generational Transmission

Shared values, another characteristic of highly cohesive groups, are typically connected to an orientation towards the common good (see Schiefer and van der Noll 2017). In the case of deaf communities, shared values usually relate to the importance of sign language and access to communication. Another common value is the consideration of deafness as something that is normal and, if a value judgment is made, as an intellectual, creative, and cultural benefit to somebody's life (this has been described as "deaf gain" rather than hearing loss in Dirksen, Bauman and Murray 2014). Deaf community members typically have little interest in being "cured" from deafness and reject expressions of pity, such as those described by Participant 09:

"It was perceived as something positive to be hearing. [...] Hearing people often call deaf people 'poor' and make them feel like they have less worth. [...] Many tell me that I am pretty, but why am I deaf? That would be such a shame!" [P09: 09:20–10:15]

Connected to this sense of pride and the key role of sign language is the desire to raise children who are signers. Out of the twelve participants in this study, eight reported using a signed language with a child or children and another participant expressed wanting to do so with a future child. Conversely, only one person reported exclusively using a spoken language with their children.

Interestingly, however, participants do not necessarily desire for the sign language they use with their children to be their heritage language, that is the sign language from their country of origin. Out of the eight participants who signed with their children, only three predominantly used a sign language from their country of origin with their children. Moreover, two of these three participants were a couple and parents of the same children, who had migrated to Austria only four months before the interview and had only had limited opportunities to learn ÖGS themselves. The third participant had a child who did not migrate with them to Austria and with whom they had only limited contact since migrating. On the other hand, five participants (and one commenting on intentions in the future) who had the choice between their heritage sign language and ÖGS chose ÖGS as the primary language with their children. The reasons given for this can be ascribed to two phenomena: monolingual ideologies regarding language acquisition and the dominance of ÖGS in their current living situation. Monolingual ideologies are based in the belief that acquiring two languages simultaneously results in imperfect acquisition of both, as can be made tangible through statements such as the following:

"I want strong—really good communication [with my children] and that means using robust Austrian Sign Language, so the communication with my children is clear." (P02: 18:11–18:18)

"If they want to learn to sign Hungarian, it's important that they first master Austrian signs and only then learn to understand Hungarian." (P03: 15:59–16:06)

Ironically, within the visual-gestural modality, these participants thus argue for monolingualism, despite advocating for bilingualism in the context of bimodal language acquisition. Interestingly, it was Participant 02's intention at first to raise his children in his heritage sign language:

"In the beginning I used Danish [Sign Language with my children]. My goal was that my children used Danish Signs, my Danish Sign Language. But for me it became a mixture. I'm based here in Austria and I only use Austrian signs every single day [...] so when I came home and signed to my children, I would just get everything mixed up." [P02: 17:50–18:11]

This experience relates into what many of the other parents describe: the dominance of ÖGS as the sign language in which they are embedded in their daily lives. Because of this, parents may not have intentionally chosen to raise their children solely in ÖGS, but rather communicated in whatever way felt natural and came to them first, which mainly was ÖGS given their everyday life context in Austria. At the same time, knowing a dominant language is connected to integration into a community as well as upwards mobility. Even as children will learn ÖGS as they get older and attend a deaf school and/or become involved in the deaf community themselves, parents may opt from the beginning to prioritize this language over a language from a country to which they do not intend to return. As Participant 08 argues:

"I live here. I must respect Austria and sign Austrian!" [P08: 23:02–23:06]

In contrast, most (hearing) migrants do not use the dominant oral language German with their children (72.7 % of children aged 15 to 16 (Cerna, Brussino and Mezzanotte 2021)). This difference may be due to the high degree of ÖGS competence of the participants in this study, as described in Section 1. The deaf migrant participants in this study may simply have had achieved higher proficiency in the sign language of their new home or host country, allowing them to use it with their children to an extent that is not possible for other migrants for whom new oral languages were not as accessible.

   To summarize, simultaneous acquisition of more than one sign language as well as the mixing of sign languages was generally considered negative by participants, and ÖGS was preferred over heritage sign languages for reasons of integration and upward mobility. While participants thus have strong opinions about the value of sign language in cross-generational transmission, they do not place the same importance on *which* sign language that is. Again, this tendency across participants may be regarded as an indication that participants consider transmitting deaf culture (learning a sign language) to be more important than transmitting ethnic, national, or regional culture (learning a language belonging to this background).

4. Limitations

Given the challenging reality of finding participants from hard-to-reach subgroups within the deaf population, twelve participants for such a study is often considered a suitable, if not ambitious, sample size in the field of sign language linguistics. However, readers—particularly from other fields of research—may express the valid criticism that this may not be a large enough sample size to

make generalized claims. This study uses a mixed methods approach, analyzing not only participants' own statements (as done in this chapter), but also coding and rating participants' actual language use during the interview. Thus, even if the challenges of finding more participants could be overcome, a larger sample would not be feasible. A future, larger-scale study is therefore necessary to make generalized statements and confirm the results found here. That study should focus more on social (rather than linguistic) questions when developing the interview guidelines.

It is important to consider that the research is also influenced by the way participants were recruited. While the researchers made an effort to use all channels available to spread information about the study, deaf migrants who are more involved with the ADC may have been more likely to become aware of it. Similarly, it is possible that the deaf migrants who were willing to participate were also those who were more inclined to talk about their experiences, because they were happier with those experiences and with their own (linguistic and other) achievements. The researchers tried to alleviate this potential issue when designing the information materials by using neutral language ("Do you want to talk about your experiences?") and making it clear that they did not have to sign but could also draw or show things on their phones, focusing on the enjoyable experience of signing with a deaf peer and not mentioning ratings. Still, the sample may be biased against participants with lower sign language skills and less self-perceived success.

5. Conclusion

The results discussed in this chapter provide insights into shared themes in the migratory experiences of twelve deaf migrant signers in Austria as well as their diverse experiences and attitudes regarding social and workplace integration in Austria. One finding is that intersectional identities can result in negative outcomes, as demonstrated by one participants' experience of discrimination based on being a deaf Romanian woman in Italy and another participant's struggle to receiving a Disability Identity Card given non-Austrian documents and language barriers. With respect to labor market opportunities, deaf individuals cannot access the auditory input necessary to learn a spoken language without severe effort (see Gspandl et al. 2023); this issue is exacerbated for deaf migrants who nevertheless are expected by employers to speak German. At the same time, participants generally experienced the ADC as a minority language community that is welcoming and accepting of their diverse communicative repertoires, and this contact facilitated integration in Austria. ADC members' aptitude to learn additional sign

languages and relate to deaf signers across linguistic and national borders may thus alleviate some issues of intersectional discrimination.

All participants have been in contact with members of the Austrian deaf community (ADC), but not all can be considered (active) members of this community themselves. The present findings indicate that the social cohesion typically found within deaf communities also extends to the experiences of migrant members of the ADC, most of whom demonstrated high degrees of perceived unity (deaf-same) and shared values (importance of deaf partners and signing) with the Austrian deaf community. This cohesion and community may ease the challenging experience of arrival in a new country. Importantly, the self-image of these individuals does not match their perception as "pitiful" by some members of the hearing majority. In fact, despite reports of the marginalization and challenges, many deaf migrants are skilled workers in shortage occupations, possess a high level of competence in ÖGS, and are well-integrated active members of deaf clubs.

In the case of the ADC, the diversity brought by deaf migrants does not seem to diminish cohesion. In fact, heterogeneity may be a typical feature of deaf communities—whether with respect to self-identification, age, socioeconomic status, manner of language acquisition, or other things. Through their upbringing in a hearing world, the experiences of deaf individuals today are often a blend of two cultures and involve a choice to participate in both worlds (Emerton 1996). The backgrounds of deaf migrants may thus be considered an extension of this phenomenon. As Douglas Baynton (2015) writes, "[d]eafness is not what it used to be. Nor has it ever been just one thing, but many." Deaf migrant experiences may be improved by improving ease of access to (subsidized) interpreters in order to facilitate contact with administrative offices and raising awareness of the competencies of deaf individuals and their communicative needs. Increasing deaf migrants' well-being and integration into Austrian society thus not only requires more research in this area but also a thorough dissemination to reach both political stakeholders as well as the general population.

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Racist Inclusion and Marginalization in Medical Education and Practice in Germany – Perspectives of Racialized Medical Students and Physicians in the Context of Social Cohesion

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Abstract

Social cohesion can be seen as mainly constituted by social relations, sense of belonging, and orientation towards the common good, whereas inequality in access to material and symbolic resources and quality of life outcomes may be seen as antecedents or consequences of social cohesion (cf. Schiefer and Van der Noll 2017). Our exploratory study on racism in medical education and practice in Germany revealed connections to social cohesion understood in this way.[1] This chapter takes a first step toward addressing these connections, arguing, above all, that different levels of institutional racism are closely intertwined. For example, exclusionary practices towards racialized patient groups are reflected in the de-thematization of racism in medical education, and exclusionary semantics, such as 'us-them' distinctions in teaching materials, are reflected in the everyday experiences of students and physicians. As a result, we conclude that the various elements of social cohesion cannot be considered in isolation from one another, especially in the context of racist social relations and with respect to the challenge of transformative social change.

Keywords: institutional racism; healthcare; medical education; omission; stereotyping

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Even if what counts as "health" in a pluralistic society is not based on a uniform concept, health is nevertheless upheld as a general value, as evidenced by its anchoring as a human right (UDHR, Article 25 of the Universal Declaration of Human Rights). To a certain extent, and with regard to biopolitics, health can be described as a "common good" and also as an antecedent and consequence of social cohesion. (cf. Foucault 2014a; Lee and Zarowsky 2015; Schiefer and Van der Noll 2017; Vogt 2021, 34–38). While the health of individuals and groups is influenced by various subjective and objective as well as social, psychological, economic, biological, and environmental factors (cf., e.g., Lenk 2011 or McElroy et al. 2021), *institutional healthcare* by professional service providers can be seen as a determining pillar of our society's approach to health (cf. Abimbola et al. 2017; Illich 2007). Overall, it can be stated that the health-related distribution of resources reflects social relations, which in turn are co-structured by racist relations[2] (cf. Bonilla-Silva 1994; Hamed et al. 2022).

On the one hand, experiences of racism can be the reason and trigger for disease states (cf. Williams et al. 2019; Priest and Williams 2018; Lazaridou et al. 2022). On the other hand, racist social relations may contribute to the fact that healthcare for certain population groups is not always—as envisaged in the UN Social Covenant—"adequate, available, accessible, affordable and of sufficient quality"[3] (Wendeborn 2021, 264) (cf. Ahlberg et al. 2019; Smedley et al. 2003). Such inequalities—embedded in overall racist relations—run counter to the "moral foundations of public health and health policy" (Powers and Faden 2006), to Beauchamp and Childress' four principles of biomedical ethics[4] (2019), and, as we elaborate below, at least indirectly to the challenge of "social cohesion":

"A neglect of healthcare racism and subsequent perpetuation of systematic disadvantage trample both on Rawlsian notions of distributive justice (Rawls 2001) and Powers and Faden's (2006) conceptualization of justice based on human well-being." (Elias and Paradies 2021, 54)

In addition to the immediate consequences for the health of a population or certain individuals and groups, racist social relations in healthcare also may impede people's "sense that they are engaged in a common enterprise, facing shared challenges, and that they are members of the same community" (Maxwell 1996, 13),

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2 In our approach to institutional racism, we understand "racism [as] inherently embedded within social structures" (Elias and Paradies 2021) and refer to authors including Nazroo et al. who—in addition to the analysis of institutional processes (in healthcare)—"examine how the systems of operation in institutions relate to both structural and interpersonal racism, which are reflected in routine procedures, in cultures of practice and the collective-emotional regulation of relationships" (2020) (see also footnote 14 on Essed's approach to "everyday racism").

3 Translation by the authors.

4 The four principles are Respect for autonomy, Non-maleficence, Beneficence, and Justice.

which is at the core of social cohesion (cf. Schiefer and Van der Noll 2017; see also Markus and Kirpitchenko 2007). The focus of this article is on racist knowledge[5] in medical education and practice as one important structural element of health care in Germany, and in particular on the perspectives of racialized medical students and physicians on medical knowledge and practices. With regard to both patients and students and physicians, racism in medicine and healthcare has potential consequences here for social cohesion. The following quotation, which refers to the already widely studied US-American context, foreshadows our argument:

"Our medical system is structured to individually and systemically favor *white* physicians and patients in ways that *white* people are trained to ignore. Most *white* doctors do not think race affects them or their clinical decisions and are taught to ignore their own racial privilege in favor of a meritocratic social myth." (Romano 2018, 262)

Institutions are important in two ways for the social production of (racialized) difference, which is closely related to the inequalities mentioned above. Institutions distribute (access to) resources—in our case health services—and they have the power of attributing characteristics to their subjects (cf. Karakayalı and Heller 2022, 179). Both play an important role in our consideration, and the entanglement of these two features implies a fundamental challenge of our approach. Institutions not (only) consist of fixed organizational structures or purely official guidelines but represent fluid power dynamics and (hidden) normative truth claims that extend across the most diverse levels and dimensions (cf. Foucault 2014b). We approached this institutional complexity empirically by examining relevant teaching materials (textbooks, learning apps, seminar materials) and the German National Competence-Based Learning Objectives Catalogue Medicine 2.0 (NKLM 2.0)[6] for racist knowledge, and by reflecting on these findings together with racialized medical students and physicians in relation to their everyday experiences in medical school and practice.[7] Empirical insights into

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5 Racist knowledge—in the form of, for example, conscious or unconscious prejudices, stereotypes, beliefs, and everyday routines—is based on the process of racialization. In this process, certain groups are identified based on certain characteristics, homogenized, and finally hierarchized mostly as a result of an devaluation in relation to the dominant normative group. Racist knowledge largely exists in an interplay with historically rooted discourses, power relations, and forms of suppression.

6 "The aim of the NKLM is to describe those competences that are to be acquired by all students of medicine in the sense of a core curriculum." (NKLM 2021) This and all other English translations of German-language source texts, including of transcriptions of interviews conducted in this study, are by the authors.

7 Four main empirical steps were evaluated by means of qualitative triangulation (Flick 2011): (1) preliminary interviews were conducted with academic experts and antiracist working groups from medical student bodies. Based on this, (2) the teaching materials mentioned in the text above were sampled and compiled. The sample consisted of text and image material including case studies and approximately 800 photographs from relevant textbooks in dermatology as well as anamnesis and general and family

the reciprocity of different organizational structures, speaker positions, and settings emerged, revealing fundamental mechanisms of racialization, exclusionary practices, and normative assumptions (cf. Terkessidis 2004) in the field of medical education and care. This paper addresses the delicate and paradoxical balancing act between the systematic inclusion and the systematic exclusion of racialized (patient) groups in medical education and practice, both in teaching materials and everyday experiences. Our focus is on the perspective of students and physicians with regard to both their own position and the treatment of patients. Thus, this chapter examines the intertwining aspects of social relations (including trust, participation, and acceptance of diversity[8]), identification and belonging, and orientation towards the common good as constitutive elements of social cohesion, and it considers potential (in)equality in healthcare and related quality of life as antecedents and consequences of social cohesion (cf. Schiefer and Van der Noll 2017).

1. Racism in German Medical Education: From Classification to Omission, Stereotyping, and its Consequences

1.1 Classification

Medical decisions are often made in a context characterized by a heavy workload, tremendous responsibility and time pressure, and contact with a large number of diverse people. It is often necessary to draw quick, difficult and serious distinctions, for example, regarding anamnesis, diagnosis, and disease treatment. Even

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medicine; widely used online learning platforms (including exam questions from 2005–2021 on various disciplines); and the contents of the NKLM (NKLM 2021). (3) Examples of potentially racist knowledge were summarized in a text document, which was discussed in semi-structured individual interviews with five physicians, twelve medical students and one medical psychologist who identified as being affected by racism. Recruitment took place via an online letter, which was spread on social media and in student and medical networks. Interviewees identified themselves in the interviews as, for example, Black person, Asian person, Person of Color, Woman of Color, Afro-German, or German. The joint examination of the document was accompanied by discussion of participants' personal everyday experiences in medical school and/or clinical work. Results from the interviews were then (4) summarized thematically in another text document and reflected on together in two focus group discussions (n=5 and n=7). Finally, the entirety of the material was subjected to a sociology of knowledge approach to discourse (Keller 2011) by means of triangulation (cf. NaDiRa 2023).

8 We do not address aspects such as the 'negative' effects of ethnic diversity on social cohesion here: for example, polarization between dominant groups or their traditionally hegemonic ideas and the establishment of, for example, a post-migrant society and corresponding values. For a discussion of this, see van der Meer and Tolsma (2014).

if physicians base their decisions on an elaborate body of knowledge, in the context of the necessary distinctions, they often run the risk of making assumptions or condemnations that do not or cannot do justice to a certain situation or person. According to Ludwik Fleck, this kind of dilemma is inherent in medical thinking, at least regarding its approach to (entities of) diseases:

"These [...] ideal, fictitious pictures, known as morbid units, round which both the individual and the variable morbid phenomena are grouped, without, however, ever corresponding completely to them – are produced by the medical way of thinking, on the one hand by specific, far-reaching abstraction, by rejection of some observed data, and on the other hand, by the specific construction of hypotheses, i.e. by guessing of non-observed relations." (Fleck 1986, 40)

The results of our work make it clear that the distinctions doctors need to make with respect to clinical pictures and patients is not only reflected in the socio-historically rooted systematic omission of entire patient populations from normative models. Medical distinctions can also lead to patterns of active racialization, exclusion, and unequal treatment of certain groups of people. As will become apparent in this chapter, there is often a fine line between a useful, appropriate, and necessary classification of an issue and an unfounded, pejorative, and potentially dangerous attribution or stereotyping of a person or group.

Looking at teaching materials from medical education in Germany, we found the use of a certain semantics or language as an example of the subtle mediation of norms that create inclusions, but also (may) create, reinforce, and legitimize social hierarchies and exclusions through classifications. This ambiguity seems to be inherent in classifications, and especially impactful in the context of racialized spaces and medicine.

"In their various shades (in terms of ancestry, class differences, diagnostic categories, racial and ethnic labels, and their many intersections), classifications in [...] medical practice, among others, are extremely powerful, implying material effects for the subject(s) they target. They shape the epistemic space of what is thinkable, conceivable, and targetable. Unavoidably, the resulting categories include as well as exclude, often simultaneously. They can be tools and obstacles at the same time, and have profound impacts on the lives and bodies of both humans and nonhumans. In that sense, they are deeply relational and contingent; their effects vary depending on their specific articulation in practices. Their arbitrariness may play out between different actors as well as within individual subjects, as classificatory violence and social entitlement may go hand in hand [...]." (Schramm and Beaudevin 2019, 277)

1.2 Omission/Direct Exclusion

The use of categories and classifications in medicine described above relates to the fact that physicians in practice refer to models that represent socio-histori-

cally rooted, normative ideas of health and of the human being and body. In addition to other groups such as the elderly, women, or people with disabilities, certain racialized groups fall outside the grid of the 'normal'[9], which is not explicitly named in the teaching materials, but becomes partly evident in characteristics such as light skin[10] or belonging to a distinct/explicit 'cultural area' (German in original source: "*Kulturkreis*") (cf. Hermann et al. 2017, 190).

This became particularly clear in visual materials from textbooks and learning apps, in which almost exclusively light-skinned bodies are depicted. This is the case in the field of dermatology, which is often referred to in the debate, but also in other diverse fields, as demonstrated on various learning platforms on the topic of visual diagnosis. This *structural omission* was reflected in the educational and professional experiences of the interviewees with regard to (their own) interaction with patients, as the description of a racialized, non-Black physician indicates:

"Or, to be honest, I have to confess that with Black patients, when I drew blood or started an IV [...], I was surprised at myself that I thought: 'Oh gross, you can't see the vein so well now.' Quite classic. So, we had [...] a course on how to insert a cannula using dummies. Of course, they were plastic, [...] but they all had beige skin. Light beige skin. And of course, it was so skillfully made that somehow [...] dye fluid was in it [...] and then you could see it like this, then you could feel it and prick it and so on. I also understand that if you had simulated Black skin, that would not have been so easy for a beginner or a trainee. But then I really thought to myself: 'Holy shit. Gross.' I didn't do it often either. And I remember that very well, that I thought it just happened so little too." (Physician interview 03)

With regard to the omission of certain patient groups, our interviews and focus groups revealed the complex tension between the question of considering versus not considering various patient characteristics in medicine. While according to the NKLM 2.0 doctors should be able to "explain the consideration of ethnic backgrounds in the selection of [drug] therapies" (NKLM 2021[11]), the question of systematically recording and considering certain personal characteristics is (in medicine) controversial, especially due to the historical context of Germany. At the same time, in the global context of medical research, which is regularly used in everyday medical studies and professional life in Germany, "race" is not only regarded as a social construct but is frequently framed in decidedly biological or genetic terms (and independent of socio-economic inequalities) (cf. Chadha et al. 2020; see also next subchapter), even as the use of 'customary ethnic classifi-

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9 We want to mention the important aspect of intersectionality here. Individuals and groups can be affected by different forms of omission, exclusion, and discrimination at the same time.

10 In the following examples, we refer to the medical classification of skin types according to Fitzpatrick (cf. Moll 2016: 491). Dark skin here means type V and VI.

11 Section: "Overarching and disease-related learning objectives" ("Übergeordnete und krankheitsbezogene Lernziele").

cations' is controversial with respect to, for example, pharmacological considerations (cf. Goldstein et al. 2003).

While the question of considering certain characteristics was widely understood by the study participants as a complex process of negotiation, it seemed to be self-evident for most interviewees that medicine is characterized in many respects by *normative exclusivity:*

"Sure, the pictures you use in lectures, the anatomy atlases, [...] there are simply *white* people in them, even these drawings. So, they are not always original photos. The drawings are also 'Central European standard', so to speak. And that is worth changing." (Physician interview 03)

The examples suggest that the systematic non-inclusion or omission/exclusion of certain groups and contexts can directly produce inequalities in medical care. However, the omission of racialized groups is also reflected in the fact that certain historical contexts of medicine and the issue of racism as a factor of health and illness hardly play a role in medical education:

"Even more, I mean, just the absence of talking about the reality of non-*white* people, during the studies, if we're being honest, is the subtle fact of racism. Or for example, we have this course called history, ethics, and law in medicine [...], and they just started with the Holocaust smartly enough, because this is painful enough for German history, but going to colonialism and the role of medicine in colonialism, they just didn't mention it. So, for students who are not aware, the history of German medicine starts with the Holocaust. And euthanasia and all that stuff, which is like highly problematic, obviously and important to talk about. But you cannot just skip stuff that happened before which [...] is still so relevant for how medicine is today, like colonialism and tropical medicine and Robert Koch and all these kinds of people, they never talked about it. So, for me, that's a kind of subtle way of producing racism by not naming, by not telling this type of story." (Student interview 11)

1.3 Racialization and Stereotyping: Semantics, Lack of Transparency, Bias, and Pathologizing

Our findings show that stereotypical attributions result in racialized groups being largely excluded, if not omitted, symbolically and thus also materially. Here, we consider certain topics found in the US literature, primarily referring to a study of preclinical lectures in US medical schools entitled "The Role of Medical Schools in Propagating Physician Bias" (Amutah et al. 2021).

The omissions described represent potentially consequential (data) gaps in research, teaching, and practice or general structural exclusionary practices. They also imply that racialized groups are treated differently when they are not completely excluded. This is evident in the teaching material samples in mostly subtle, sometimes literal 'us-them' distinctions and stereotyping to exoticizing attri-

bution patterns. These refer to the juxtaposition of characteristics such as skin color, origin, religion, nationality, or language (skills) with supposed social values and norms. Here, a complementary connection is forged through the naturalizing process of racialization, that is, a group is homogenized by the attribution of certain characteristics and is then juxtaposed with a normative group (polarization) in a hierarchical manner in favor of the norm (cf. Eggers et al. 2020; Miles 1991; Rommelspacher 2009; Terkessidis 2004). Here too, visual materials were one starting point. In interviews, it is reported again and again:

"That diseases are simply not discussed on dark skin, or if they are discussed on dark skin, then they are just tropical diseases, so that also has something exotic about it." (Student interview 01)

In the rare cases where dark skin types were found in the teaching materials, the respective patients or their respective contexts are often marked as exotic, alien (e.g., as foreign, German: *ausländisch*) or deviant (e.g., due to irresponsible behavior) and thus the group with the characteristic "dark skin" is located outside the common notion of norms or the "self" group.

Beyond the illustrations and the characteristic of skin color (e.g., in text-based case studies for exam preparation), materials include markings whose relevance for the medical context is often unclear and which flow into racializing and exclusionary classifications. In this way, we identified *semantic structures* that are also reflected in everyday experiences as reported during the review of teaching material samples and our joint reflection with the interviewees. Terms and group classifications are often used inconsistently and vaguely. One example is a chapter entitled "Foreign Patients" ("Ausländische Patienten"; Hermann et al. 2017) in a widely used textbook. Not only does the title itself contain a problematic separation through content and language; above all, various persons, groups or characteristics (such as "Tamil patient", "Turkish patient", "Eastern European [...] men", "adults [...] [from] sub-Saharan Africa", "migrants" or "asylum seekers"; Hermann et al. 2017, 179–190) are listed under this label, all of whom are located beyond a prototypical 'Western cultural area' and therefore as separate from supposedly shared values, norms, and behaviors. The use of attributions associated with "ethnicity" are not uniformly explained and contextualized (e.g., with regard to migration history, residence, or citizenship), and there is no critical discussion of how or via which "markers" these attributions could arise in practice (cf. Hermann et al. 2017).

With regard to the classification of geographical, biographical, or cultural contexts, a clear demarcation from stereotypical attributions of the respective groups is not always made. Accordingly, *differences in disease prevalence between different groups* are often conveyed in lectures and teaching materials *without sufficient context and transparency* (cf. Amutah et al. 2021) (e.g., regarding structural contexts

of socio-economic conditions), which can imply a subtle naturalization of certain associations. Alleged connections between racialized characteristics and behaviors or disease prevalence are often presented as given and may thus be incorrectly internalized by students. This internalization can lead to *diagnostic bias in medical practice* (cf. Amutah et al. 2021; Chapman et al. 2013). In addition, we observed the aspect of *pathologizing certain racialized characteristics or groups* discussed by Amutah and colleagues (2021). For example, our observations suggest that risky behaviors (such as excessive alcohol consumption or 'poor' pregnancy prevention) or low socio-economic status are consistently over-represented among certain racialized groups in teaching, without further explication of socio-economic or contexts of racialized inequalities. As they accumulate, such associations can be internalized as given relationships between group characteristics and presumed predispositions to disease, which can reinforce a naturalization of difference addressed above (cf. Banaji et al. 2021). Such representations can also contribute to the stigmatization of racialized patients, perpetuate racist hierarchies, and obscure the role of racism in the development of disease (cf. Williams et al. 2019).

2. Racism in Medical Education in the Context of Social Cohesion

2.1 Consequences for Social Cohesion

Our findings have potential implications for clinical practice and beyond. Fundamental examples are treatment bias or communication barriers, as documented in international studies (cf. Chapman et al. 2013; Gerlach et al. 2008a, 2008b; Gerlach and Abholz 2009; Hagiwara et al. 2013). However, prejudices among physicians can also have a negative impact on access to treatment, including with regard to the interpretation of legal provisions concerning access to adequate medical care (e.g., treatment of people without health insurance in case of an emergency) (cf. Suurmond et al. 2010 or Jensen et al. 2011). While exclusionary practices in care may influence patients' sense of social belonging (e.g., through devaluation and stigmatization), the (lack of) representation of racialized groups in the medical profession plays a role in the quality of treatment of racialized patients (cf. Aikins et al. 2021; Hagiwara et al. 2013). Our findings also show that this representation is influenced by disadvantages in access to education and employment and with respect to identification and recognition as medical students or physicians. Various examples include reported patient statements, such as "I won't let you treat me," and statements by interviewees, such as "Black women are the last to be seen as physicians".

One of our main findings relates to the systemic reciprocity and circulation of racist knowledge in medical education and practice. Among other things, this can be traced to the practice of classification, which generates social exclusions and marginalization through group inclusions based on stereotypical attributions, as described in the previous subsection. These attributions frequently extend across medical necessities and contexts; they are thus inscribed and encountered at various levels of institutional practice. The data reveals the existence of broadly normative standards through the aforementioned systematic omission, on the one hand, and via generalized stereotyping of racialized (patient) groups, on the other. This is especially evidenced in the construction of an 'us' in the medical profession. The distinction between a supposed 'us' and 'foreign', and corresponding understandings of illness, was already observed in a qualitative study on the experiences of German general practitioners in dealing with Black patients and "patients with a migration background" (cf. Gerlach 2008a). In the teaching material samples and in our interviews, an interpretive knowledge emerged in which physicians and medical students are conveyed not only as parties in the doctor-patient relationship, but also as representatives of a hegemonic, supposedly German or 'objective', and in any case normative culture vis-a-vis patients who supposedly do not belong to this culture or at least are not seen as corresponding to the norm or to doctors' 'own cultural circle'. Thus, the 'us' conveyed in the medical profession implies not only the potential exclusion of racialized patient groups, but also the potential exclusion and lack of representation of racialized physicians and medical students.

In this way, different factors of social cohesion are mutually constituted between racializing care for certain patients and the professional position or exclusion of racialized medical students and physicians. For example, the sense of belonging and identification of racialized physicians regarding their professional status (and therefore their social status and access) can be affected by interactions with colleagues and patients or by their experiences of racism against several patient groups, as well as by their experiences of systematic ignorance, de-thematization, and the taboo status of racism in medical education. Physicians can be racialized and excluded by lecturers, colleagues, and patients and can witness racism against patients at the same time, whether in everyday clinic life, study life, or in the contents of teaching materials. All this can affect physicians' experiences and positions regarding social relations and cohesion in the institution and in society as a whole (for the US context see, e.g., Hennein et al. 2021). For example, the patient statement "I won't let you treat me" implies that the patient does not consider the person a doctor because he or she is 'apparently not a full member of society', and vice versa. At the same time, racialized patients may be excluded by unequal treatment, which may directly affect their

health as a part of a common good, their sense of belonging to society, their trust in the institution, and their quality of life. The mutually constitutive nature of racisms against these two groups (physicians/students and patients) is reflected in the circulation of anti-cohesive racist knowledge and practices regarding both horizontal and vertical relations between individuals and/or groups and between individuals/groups and the institution (cf. Sim et al. 2022). This also entails different degrees of abstraction regarding different concepts of social cohesion and respective elements (e.g., concrete social relations between members of a social entity versus more abstract individual/group identification with this entity [cf. Schiefer and Van der Noll 2017: 589] or the relation and distinction between "the three levels of social cohesion": the individual, the community, and institutions [cf. Fonseca et al. 2019]).

While we cannot deliver a detailed analysis of aspects of social cohesion regarding our focus here, we can point to some intertwining moments of common approaches to social cohesion, referring mainly to Schiefer and Van der Noll's (2017) literature review on essentials of social cohesion. Our understanding of racism as a societally and historically embedded phenomenon implies a broad and critical definition of social cohesion, but we cannot fully elaborate this claim here. At the very least, however, it is important to state in this context that the concept of social cohesion must be understood not only as a matter of academic (theoretical or empirical) reflection or political negotiation processes and actions but also as a (top-down) instrument of governmental, institutional, and social power (from which we do not exempt ourselves and our work), including the concept's implicit and partly unquestioned paradigms and presuppositions. Therefore, social cohesion must be framed here as a reflective construct, which means that we assume "a latent (not [directly] observable) construct (here: social cohesion) to manifest itself in different observable characteristics [...]" (Schiefer and Van der Noll 2017, 596) in the context of racism in German medical education and practice.

As the COVID-19 crisis and related social polarizations have demonstrated, *health*—despite its plural conceptualizations—can be interpreted as a widely *shared value*, as a factor for objective and subjective *quality of life*, and even as a *common good*. Therefore, different aspects of health may be seen as antecedents, consequences, or constitutive (orientation towards health equity) elements of social cohesion. At the same time, *healthcare as a resource is unequally distributed*. Racist knowledge and practices in medical education may be an important factor in this regard. Not only are they one possible route to potential treatment bias and other factors of unequal quality of medical care. They also imply the rein-

forcement of systemic racism in the institutions and its individual actors[12] and of (e.g., legal or discursive) barriers for certain racialized groups. Our findings are reflected in the citation of Romano at the beginning: a *white* medicine implies a problematic relationship to (acceptance of) diversity as well as a lack of 'orientation towards the common good' and thus runs counter to social cohesion. With respect to diversity, a key challenge is the question of how to differentiate between inclusive, appropriate, and necessary medical classifications/categorizations and unfounded, pejorative, exclusive, and racist attributions, which transform (supposed) different social backgrounds or biological characteristics into systematic discrimination and institutional racism against groups and individuals.

Whereas unequal treatment and its potential, direct or indirect impairment of quality of life can be seen as antecedents or consequences of a lack of social cohesion, our empirical material shows that they relate to one constitutive element of social cohesion (cf. Schiefer and Van der Noll 2017). Racist knowledge and practices affect the *feelings of belonging and professional identification* of students and physicians. Exclusionary interactions, silencing, lack of recognition, and racist stereotyping by lecturers, colleagues, and patients are serious barriers for the careers (and therefore social and professional participation and representation) of racialized physicians.

"Because it is difficult to stay motivated to study [...] when people don't see me as a doctor anyway. And [...] especially in the first two years, which are very, very full and very exhausting, and then I say to myself, okay, why am I actually doing this, when I really have patients here who say: 'I won't let you treat me'. [...] And that is certainly difficult. Because when I experienced racism during my studies [...], I thought to myself, that means that [...] maybe many of my colleagues will reproduce racism themselves in the future, so that I will be in this system, which is racist. And I myself, even though I don't really want to, perhaps support it. [...] Also, regarding experiences of racism, it's partly expected from you that you nevertheless get along with it and now to the next course. So, it's not at all easy to find your way back into everyday life." (Student interview 08)

Furthermore, patients—as citizens and human beings—may be emotionally and socially burdened by othering and exclusionary practices, which are connected to their *quality of life*. In turn, these feelings of *non-belonging* (regarding *horizontal social relations to other members or the majority of society*), combined with unequal treatment by medical professionals, may be a basis for *mistrust regarding vertical social relations*: towards the institution of medicine and its legitimacy (cf. Elias and Paradies 2021; Aikins et al. 2021).

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12 Our approach on racism is, among others, guided by Philomena Essed's "notion of everyday racism [which] transcends the traditional distinctions between institutional and individual racism" (Essed 2002, 179).

It should be noted here that the perspectives of racialized patients were not mainly addressed in our study. Further research is needed, especially in the German context (see for example NaDiRa 2023). However, international studies show that the underrepresentation, misrepresentation, and overrepresentation of certain groups and the authorized normalization of this racist knowledge in medical education can produce, perpetuate, and reinforce racist prejudices, beliefs, attitudes, routines, and related practices among physicians (and other healthcare staff), which in turn can negatively influence patients' access to and utilization of treatment as well as quality of care (cf. Amutah et al. 2021; Hernandez 2018; Gonzalez et al. 2014; Hagiwara et al. 2013; NaDiRa 2023).

2.2 Possible changes towards cohesion

Both concepts and phenomena, social cohesion and racism, cannot be adequately addressed in this contribution. We have simply alluded to certain points found in our empirical data. Furthermore, it is debatable whether a notion of racism as "the ideological apparatus of a racialized social system" (Bonilla-Silva 1994, 2) is compatible with the concept of social cohesion, especially when the latter is used as a governmentally controlled political instrument. Nevertheless, we will conclude by trying to highlight some possibilities for action and change in medical education and health care in the context of social cohesion.

First, it can be stated that social relationships, as social networking inside of racialized groups, are an important tool of empowering, coping, and surviving in racist social relations (cf. Loyd et al. 2021). There is no question that community identification and inclusion is a strong factor of social cohesion among racialized minority groups and therefore a catalyst for visibility in society. Regarding medicine, patient, student, and professional organizations are becoming larger and more numerous. This may lead to a better representation of racialized patients and medical professionals (including those in higher positions) and, accordingly, to more patient confidence in the institution.

Confidence in the institution could also be increased by more equal treatment. One crucial path to this goal is by deconstructing racial norms in medical education, practice, and research. Regarding medical education, this could mean, for example, reflecting and deconstructing racist semantics in teaching materials; cross-sectional thematization of racism and its consequences in medical education and care; mandatory trainings for physicians, lecturers, practical educators, and staff; low-threshold and visible counselling and complaints offices (with com-

munity-contexts[13]); time and space for reflection of form and content of medical education inside medical education.

Furthermore, it is important to examine the structures of medicine itself to be able to transform how racism and discrimination (and other grievances) are dealt with in health care. Economization, time pressure, technocracy, naturalization, bureaucracy, and intersectional (professional) hierarchies all play a role when it comes to the intertwining of racism and social fractionalization, singularization, dispossession, and neo-colonialization. Social cohesion may be one perspective from which to recognize the dynamics of systematic and systemic suppression and discrimination of racialized groups in (healthcare) institutions and in society as a whole.

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13 Cf. NaDiRa 2023.

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The Effects of Climate Change on Women's Inclusion and Social Cohesion in Delhi

Shirin Choudhary

Abstract

Centring an analysis of the socio-economic position of women in the city, this paper explores the effects of climate change on women and social cohesion in Delhi, India. I look at the intersection and interaction of gender with different axes of marginalization in the city, including caste, class, religion, informality of work and spatial marginalization in the metropolis. These axes contribute to a sense of lack of social cohesion experienced by women marginalized by class, caste and religious identities, manifested in a lack of trust, sense of belonging and participation in public life, such as work and public spaces. This marginalization becomes intertwined with the effects of climate change as women from marginal identities face institutional and systemic inequalities during acute or prolonged climate-related crises, such as water shortages, droughts, food shortages, and environmental pollution. Therefore, this paper explores the linkages between gender and other marginal identities, climate change and social cohesion in Delhi. The paper argues that better inclusion of gender issues and women's voices in local climate action would make Delhi a more sustainable, climate-resilient and socially cohesive city.

In April of 2022, India and Pakistan faced a deadly heatwave, with temperatures that beat records of over 100 years. Heat waves are a yearly phenomenon in northern India today, with effects on the food supply, water supply, productivity, and health of inhabitants in both the cities and the countryside in the region. In Delhi, the capital city of India, the temperature ranged from 40 to 44 degrees Celsius during the hottest days of the month, leading to heat strokes, exhaustion, and the exacerbation of pre-existing ailments (TOI 2022). Extremes of weather and climate such as heat waves are not felt equally by all people. While the wealthiest sections of society are able to work in air-conditioned offices and consume more energy on cooling their homes, others are obligated to work in the sweltering heat, perform extra labour in the household to take care of those affected by the heat, and face frequent power cuts and higher energy costs.

Heatwaves have become increasingly frequent and more intense in South Asia as an effect of anthropogenic climate change. While high temperatures in the summer are not uncommon in this region, their dramatic increase has far-ranging effects on the inhabitants. Because of existing inequalities in the household and the labour market, women also experience the effects of climate change differently (Demetriades and Esplen 2009). Inside poorly ventilated homes in the informal and low-income settlements of Delhi, women are still responsible for a majority of the household work, including cleaning, cooking for household members, and care for children and the elderly (Shetty 2022). Women who work in the informal economy, outdoors or in others' homes, are not protected by any social security and risk their health, working in extreme weather conditions for low wages. Rising food prices and water shortages place more strain on women who have to manage the household resources, and those who have to stand in long queues to get water from water tankers (Truelove 2011). Menstruating and pregnant women who do not have access to affordable health care near their localities are also more vulnerable to the health effects of extreme weather. Consequently, heat waves are not equitable in their impacts on people, on men, women, children, and the elderly.

Times of crisis like those described above point us towards the cracks in Indian society—the ways in which these crises differently impact men and women, with further disparities determined by income, caste, and location in the city. Environmental crises thus create even more barriers to a sense of belonging and trust between those in a position of power and those encumbered by layered disadvantages determined by their gender, caste, income and other variables. These different experiences of a changing environmental and climatic reality impact social relations, political inclusion and social equality in any given space, and I take these, together, as constituting a definition of "social cohesion".

What does "social cohesion" mean for women who are marginalized in multiple ways by class, caste and location in a city where their everyday reality is conditioned by structural precarity, and where feeling part of a larger community or a sense of belonging with others is predicated upon the material conditions of their life? What are the conditions necessary for them to feel more in tune with the community at large, and to enhance social cohesion from their point of view *as women*? How does anthropogenic climate change threaten social cohesion for an already vulnerable group such as women in India?

This chapter deals with the intersectional challenges to social cohesion of gender, class, geographical location, and caste in the context of climate change in the city of Delhi, India. Keeping some of the above guiding questions in mind, the chapter will begin by exploring the meaning of social cohesion in the context of a developing country, referencing earlier academic work on social cohesion. Second, the chapter introduces the context of Delhi—the capital city of the now most populated country in the world. It looks at how climate change and weather extremes in Delhi threaten social cohesion, especially impacting women in the city because of their gendered roles and disadvantages. Finally, taking the examples of access to water, sanitation and inclusion in decision-making processes, the chapter argues that while climate change can exacerbate existing issues of social inclusion and cohesion for women in Delhi, there is a chance to create opportunities to involve women more equitably in decision-making about matters which affect them the most.

1. Contextualising Social Cohesion with Regards to Gender and Intersecting Vulnerabilities

Social cohesion is a vast and multidimensional topic which has been the subject of research and thinking since the early 1900s (Fonseca et al. 2019). There is still a fragmented definition of what social cohesion really is because it has been approached from multiple disciplinary perspectives—from theoretical perspectives in sociology, philosophy, and psychology to experimental and empirical research. Most definitions of social cohesion include indicators with respect to people's participation and engagement in public life, level of trust in a society and in its governmental institutions, and feelings of belonging and solidarity (Valentova 2016; Chan et al. 2006; Malerba 2022).

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1 The "Poster Women" project is an archival project of posters from the early feminist movement in India, accessible here: https://www.posterwomen.org/?p=3418.

Figure 1: 'Kali for Women', Kamla Bhasin
This image of a woman with many hands shows the tasks that women do on a daily basis in the household.
The text reads "cooking food," "cleaning," "fetching water," "fetching firewood," among other things. Be-
low the image is a line that says, "my wife does not work," a common phrase spoken about women whose
domestic work is not recognised as "real work" because it is not paid or counted in labour statistics.
Source: Poster Women[1]

A 2011 OECD report defines social cohesion through three pillars: social capital, social mobility, and social inclusion. **Social capital** refers to civic engagement and association with others in a society, **social mobility** means the degree to which people can change their position in society, and **social inclusion** concerns marginalisation and barriers that exclude some people from social and economic opportunities (OECD 2011). This paper will anchor an analysis of social cohesion with respect to the intersecting categories of gender, class, and location in the city, in the context of climate change, taking these pillars as a general guide. The ways in which these three pillars of social cohesion are experienced can be different for different people—mediated by the circumstances of their income/class, caste, religious identity, gender, and geographical location, among other things. These identities also interact and intersect with each other, as no person is contained in only one of these categories or social groups. They can act as inhibiting or enabling factors in nurturing feelings of trust, belongingness, solidarity and social cohesion within a group, community, or the nation at large.

Gender is one of the key mediating factors of social cohesion, and acts as a determinant when considering experiences of inclusion, social capital, and social mobility (McDaniel 2003). Women are disproportionately affected by unequal wages, wealth inequality and, as is the norm in India, lack of property rights within the family. Despite fast economic growth and development in the country, women in India face marginalisation on the basis of many factors, including but not limited to asset ownership, income inequality, education attainment, healthcare, and political participation (WEF 2022). According to an analysis by the World Economic Forum, India ranked 135th out of 146 countries in a Global Gender Gap Index (WEF 2022). Therefore, out of all the countries in the world, India is one of the poorest performing in terms of economic, social, and political indicators of women's participation in different aspects of the public sphere.

The labour force participation rate of women in India was 24% in 2021, considerably lower than that of men at 74.6% (PIB 2023). Women who are part of the labour force receive wages of 34% lower than men (Bhattacharya 2019). Women also spend around five hours a day on unpaid care work in the household, much higher than the male average of roughly 30 to 40 minutes a day (Coffey et al. 2020). Apart from the workforce, the political participation of women is also low. As of February 2021, only 14.4% of the seats in the national parliament or Lok Sabha were held by women. However, political participation at the local governance level (rural panchayats and urban local governments) has fared much better for women, partly due to the policy of reservation of 33% of the seats for women at the local governance level.

These inequalities on the basis of gender can help form an understanding of social cohesion to a certain extent. Lack of participation in public life—such as

employment and political life—indicates a low level of social capital and inclusion of women in Indian society. Education, employment, and income are also an indicator of whether or not women can access social mobility in Indian society and improve their living and working conditions through better opportunities. Therefore, the above-mentioned figures help us to understand gendered social cohesion as defined by the aforementioned pillars from the OECD report (2011). However, not all women experience these disadvantages in the same way in India. Multifaceted power differentials on the basis of caste, class, geographical location, and migration status indicate inequalities among women. For example, low-wage and informal jobs in Delhi are many times taken up by migrant women from rural and so-called "lower" caste backgrounds from neighbouring states, who are pushed into precarious sectors due to lack of choice and access to better opportunities (Trisha et al. 2023). Because of its haphazard planning, there are many unplanned and informal settlements in Delhi, usually inhabited by low-wage migrant workers, with varying access to civic services such as electricity, piped water supply, sanitation, and municipal waste collection (Heller et al. 2015). "Informal" and "unauthorised" settlements are precarious because the claim to land may be tenuous, having been bought through third parties and often built without proper planning permission (ibid., 2). People from migrant backgrounds and marginalized castes are overrepresented in precarious jobs and in informal settlements in the city. This kind of income and resource poverty creates a condition of "capability deprivation" and social exclusion, which is directly linked to a failure of one's capability to be part of public life, community, social relations, and social mobility (Sen 2000).

Though there is not enough empirical data that links social cohesion directly with development indicators for women marginalized by caste and/or religion in India, academics have made the linkages using these indicators of social capital, mobility, and inclusion as placeholders for social cohesion. In a study conducted by Mukherjee (2012), women were surveyed for social cohesion indicators such as access to healthcare services, mass media, bank or savings accounts, and decision-making power within the household. Mukherjee argues that it is not just economic and social disparities, but women's access to actual decision-making power and autonomy, both within the household and outside of it, that maps on to their level of empowerment and cohesiveness within society. The study found that women especially from marginalised backgrounds such as Muslims, Scheduled Castes and Scheduled Tribes were the least socially cohesive and fared low on all of these indicators (Mukherjee 2012).

2. The Case of Delhi: How Climate Change Threatens the Social Fabric

Cities are important actors in local and global climate change. They are responsible for a large volume of greenhouse gas emissions, high consumption of energy, the production of waste and pollution, and the unsustainable growth of urban sprawl (UN Habitat 2022). Since the 1990s, economic liberalisation and neoliberal reforms in the market and politics have led to unprecedented growth of Delhi's urban economy at the expense of its poorest inhabitants. According to Gautam Bhan, the focus on "cohesion and inclusion of the poor" which used to characterise Indian policies until the 1990s was no longer the model for contemporary India, as the logic of unfettered growth, the open market, and privatisation took over and created conditions of social exclusion of the poor in the city (Bhan 2009). The model of growth pursued in cities like Delhi is associated with a "lack of social cohesiveness in societal relations with the urban environment in terms of access to healthy environments and environmental decision-making structures" (Swyngedouw and Cook 2012).

More and more research shows that when a crisis such as a pandemic or a climate change-related disaster strikes, those who are already poor and marginalised by caste, religion, or where they live in the city, have less access to information about how to protect themselves and therefore are the ones affected the most (Demetriades and Esplen 2009). Highly populated cities like Delhi are extremely vulnerable to the effects of climate change on extreme weather including heatwaves, urban heat island effect, water shortages, and resulting ill effects on health and well-being. Poor infrastructure in many parts of the city, coupled with high levels of inequality, leaves many communities without the tools to cope with and adapt to a changing climate.

While income inequality plays a huge part in this, gender also systematically interacts with caste, wealth, or income, and spatial inequalities in the city. Because of women's role in the household as carers, their differentiated needs in health and sanitation, the threat of gendered violence inside and outside the home, and inequalities in access to clean water and suitable sanitation services, among other factors, they can face different problems from men during times of crisis too. Women from migrant and marginalized caste backgrounds are often pushed to living in unauthorised settlements, despite having been in the city for many years. As a result, they often live with the double precarity of barriers to healthy standards of living because of their class and caste, in addition to their gender.

One of the major climate-change-related threats faced by residents of Delhi is unreliable access to fresh water sources. As shown by Heller et al. (2015) in their work on the "Cities of Delhi" project, clean piped water is unevenly distributed

across the city, creating conditions of social exclusion. Water shortage in Delhi's informal and low-income settlements is an annual problem faced every summer season. Many of the informal and low-income settlements of Delhi are majorly inhabited by migrants from other states, especially from Scheduled Castes (SCs) and Scheduled Tribes (STs) who have been historically and systematically denied their land rights (Heller et al. 2015). These urban informal settlements are reliant on supply from water tankers even today (Outlook India 2022), and it is the women of their households who are responsible for water collection in cases where piped water supply is not directly available at the household level (Truelove 2011). This implies an increase in the time spent in household work, hindering even further women's opportunities to be included in the public sphere or access opportunities for social mobility such as education and public participation.

As part of a project team working on occupational hazards and sexual harassment against women at workspaces, in 2019, I conducted a field visit to a construction site of a large housing complex in East Kidwai Nagar in South Delhi.[2] Most of the workers in the construction site were migrant workers from Scheduled Tribes (ST) backgrounds, recruited by contractors for construction work on a large, centrally located, multi-storey housing complex to be occupied by middle- and upper-class residents in Delhi. Temporary accommodations were created by the contractors for the construction workers, with metal sheets for roofs. These were located one kilometre from the construction site itself, and the workers commuted on foot every morning and evening, back and forth from the accommodation to the workplace.

In the field interviews, women construction workers recounted difficulties in accessing toilets at the construction site and at the accommodation provided by the contractors. They complained that there were no toilets available at the construction site itself, which meant that they had to make do with the basement of the construction site or a garden located nearby, which did not provide any private space and made them vulnerable to unsafe conditions and harassment. While there were toilets at the accommodation site, these were comprised of pit latrines separated by metal sheets for walls and flimsy doors for a semblance of privacy. Moreover, these provided for dozens of workers per each toilet. There were no authorities responsible for keeping the toilets safe or clean for women workers. Going to the toilet was a risky affair, as the doors could not be locked from the inside. Women devised ways to cope with the situation, for example, by accessing the toilets in small groups to keep each other safe, or by using the toilets late at night when they were less likely to face harassment or unsafe situations.

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2 The field visit mentioned was part of the study "Women's Work is Never Safe" at the Sankaran Research Unit of the Centre for Equity Studies, Delhi.

This field example demonstrates in a most explicit manner how neglecting simple civic services such as clean and safe toilets for most marginalized groups can prove to be a huge barrier for their work and safety and, by extension, public participation. Some of the women interviewed in the field work said that many of them did not want to work at the construction site because of the lack of attention paid to their needs as women workers. As climate change is expected to exacerbate the problem of unreliable access to fresh water in the city of Delhi, it is the settlements of migrant workers that are likely to be impacted the most. As Delhi's informal and unauthorised settlements continue to be neglected by the government (Heller et al. 2015), they are most precarious to any systemic shocks in water supply, sanitation services, and proper drainage services.

Climate change-induced weather events and water shortages also have effects on the health conditions of people in the city. In Delhi, an increase in pollution has resulted in an increase in respiratory problems among inhabitants. Climate change can also create an increase in the incidence of communicable diseases such as dengue and malaria (Shukla 2022). Women often find it more difficult to access health services, especially in underserved neighbourhoods of the city where the primary health centre may be too far for them to access cheaply and independently (Heller et al. 2015). Disaster preparedness among women in Delhi is also relatively lower than among men, as they do not have easy access to information about how to protect themselves and their households from disasters and related health concerns (Sharma, Kumar, and Raja 2015).

3. Women's Participation in Climate Decision-Making to Enhance Social Cohesion

In the cases and issues explored in this chapter, one key element that would aid in shifting the power dynamics and enabling intersectional approaches to addressing the climate crisis is missing: equal representation of women in decision-making processes that affect them. Research shows that social cohesion in the city is further weakened when marginalised people are not involved in decision-making processes related to their immediate environment or to climate change (Swyngedouw and Cook 2012). Women are severely underrepresented in such decision-making processes in Delhi. In the 2020 Delhi state assembly elections, only eight women were elected as members of the legislative assembly, out of 70 seats in total. High social cohesiveness can significantly improve the adaptation capacity of a community, as a highly socially cohesive community fares better during and after natural disasters (Malerba 2022). If more and more people are involved in

decisions that affect their lives, or feel a sense of community with others around them, it can improve our collective chances of successfully facing crises such as climate change, together as a community and as a city. Social cohesion is also said to have increased the acceptability of climate policies, as a high level of trust in the government and in the surrounding community means people are more likely to support policies and make political changes for what is perceived as the common good (Malerba 2022).

While there is no direct example from the city of Delhi, instances from other parts of the world have shown that the involvement of women in climate action helps empower women of the whole community and improves traditional power imbalances (Mary Robinson Foundation 2015, 9). Women from Chile, Vietnam, and El Salvador have collectively organised and engaged in decision-making processes on climate change. This has ensured that their voices have been heard by the community and decision-makers and even created more demand among them for resources and knowledge transfer so that they can build capacity to better participate in decision-making at all levels (ibid., 20). Including women in decisions, through consultations with communities and grassroots organisations, can also ensure higher trust in institutions, faring better for social cohesion at large.

4. Conclusion

Urban areas are usually considered a melting pot of different kinds of people, especially a large urban metropolis such as Delhi. Delhi is made up of many cities, historically, spatially, and socially. Different rulers and empires built their capitals here through the centuries. In twenty-first-century Delhi, these historical cities, present-day urban villages, wealthy localities, newly built housing and commercial complexes, informal settlements, and slums co-exist side-by-side, with vast inequalities between them. In this sense, Delhi is made up of many cities and disparate realities of people who interact and engage with one another regularly, in formal and informal setups. These complexities are further heightened as divisions along the lines of caste, religion, class, and gender persist and create tensions in society.

For women, the city offers many opportunities for work, mobility, and independence that are often not present in rural areas. But these come with their challenges. Women who migrate to the city continue to face an unequal burden of care work, harassment as they enter workspaces, and challenges to their inclusion and equality in public spaces and public services in the city. As explored in this paper, different aspects of life such as access to water, sanitation, health services, and decision-making processes are already strained by existing inequalities. Low lev-

els of trust and confidence in public systems and public services can mean low feelings of social cohesiveness with the rest of society.

The current analysis of literature and evidence from Delhi shows that there are many gaps in women's social cohesiveness which can negatively impact their capacity to deal with climate change in the future. Climate change can exacerbate existing vulnerabilities and fissures in the city, making it even more difficult for women to access the public services they need, and thus sustain trust in the public sector. Given these challenges, amplifying women's voices, so as to effectively raise their demands and needs to the public sector, can lead to positive outcomes for social cohesion and the fight against climate change in the city.

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Solidarity Coalitions and Marginalization Processes in the Context of Flight and Migration since 2015

Ines Grau

Abstract

Global movements of migrants and refugees increase social diversity and trigger processes of social change that can generate new forms of exclusion and contribute to social conflict. Refugees in particular are quasi-structurally affected by exclusion. This chapter focuses on social practices that attempt to counteract marginalization processes and promoting equal life chances in German municipalities since what became known in Germany as the "long summer of migration" in 2015. Based on qualitative field research in two German cities, it reconstructs and critically reflects on the specific structures and dynamics of local networks of refugee assistance from a long-term perspective and examines their potential for forming new spaces of collective action and solidarity coalitions. The chapter explicitly addresses the precarious structural features of these voluntary networks as practical forms of solidarity in a world of inequality. In the process, it systematically considers the perspective of refugees.

Keywords: long summer of migration; refugees; solidarity practices; municipalities; marginalization

When the EU border regime collapsed in the late summer of 2015 as an aftereffect of the Arab Spring uprisings and violent conflicts in the Middle East (Hess et al. 2017, 9), thousands of people entered the European Union daily via Greece and crossed internal European borders. In Germany, more than one million asylum applications were submitted in 2015 and 2016. On the one hand, this stimulated nationalist and racist discourses and was called a "refuges crisis" in mainstream media. But at the same time, during what has since become known as the *long summer of migration* (Hess et al. 2017; Becker 2022), countless supporters across Europe became engaged at local, national, and transnational scales to support millions of people who had made the dangerous journey to Europe, fleeing war, hunger, and persecution. In various alliances, they began to practice solidarity for and with refugees against exclusion and marginalization in new ways (Zajak and Gottschalk 2017; Fleischauer 2020; Schiffauer et al. 2017; Speth 2017). These solidarity coalitions, as the following argument elaborates, create new forms of social cohesion[1] that transcend existing lifeworlds and social milieus. Following Forst (2020), I regard solidarity as a concept relevant to questions of social cohesion, knowing well that the concept of social cohesion can be charged with different meanings[2] and is tied to constantly changing discursive practices, especially in the field of politics (Quent et al. 2020, 80). Understood as "a practical attitude of standing up for one another, which expresses a certain form of connectedness"[3] and which presupposes "that one is prepared to contribute more than others, if necessary, for the sake of the common cause" (Forst 2020, 46), solidarity expresses an attitude oriented towards the common good, which (can) manifest itself in concrete practices. In the context of refugee-support solidarity work in particular, solidarity collectives are multi-layered and shaped by experiences of inequality, difference, and foreignness, which are often seen as a challenge to social cohesion.

The following reflections are based on qualitative field research in two German municipalities in 2021 and 2022 conducted in the scope of a project entitled *Solidarität erzählen* (Narrating Solidarity). They focus on the dynamics of cohesion in practices of solidarity with refugees and their local characteristics and development, without claiming to make representative statements about the entire population of Germany (Albarosa and Elsner 2023). The article is structured as follows:

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1 Even though it is not part of the research presented here, it should be pointed out that the inflow of numerous refugees has also created new alliances of people sharing anti-immigrant attitudes, as manifested in movements such as *Pegida* and rising vote shares for far-right parties (Albarosa and Elsner 2023).

2 There is no generally accepted definition of social cohesion in the scientific literature to date (Albarosa and Elsner 2023, 14).

3 All citations from German-language sources have been translated into English by the author.

first, I briefly outline the experiences of marginalization of refugees, drawing on my field research. Then, based on that empirical material, I reconstruct solidarity practices and alliances in the municipalities and elaborate this with the help of two case studies. In a concluding discussion, I critically reflect on the inherent potential for the formation of new collective spaces of solidarity-based action and the limits of their power to shape social cohesion processes.

1. Marginalization of Refugees

There is no question that refugees are particularly affected by structural disadvantages and experiences of marginalization. As outsiders in a new environment/country, they exist in a situation inherently characterized by a lack of social networks; a lack of knowledge about customary practices, rights, and language; existential insecurities about residency prospects; worries about distant family members; exposure to trauma; and spatial segregation—not to mention a lack of opportunities for political participation and social inclusion. Other characteristics, such as gender, age, level of education, country of origin, sexual orientation, and family situation, also moderate the manifestation and complexity of experiences of marginalization (Tietje 2021; Braun and Dinkelaker 2021; Schacht 2021). An intersectional approach going beyond legal and Black feminist applications (Crenshaw 1989) allows this complexity to be made visible. The legal categories and statuses existing in asylum law alone (including refugee status according to the Geneva Refugee Convention—for a critical view, see Di Cesare 2021, 138ff.; "tolerated" status [*geduldet*]; undocumented persons) are crucial for determining whether and to what extent refugees receive access to the regular labor market, language courses, and the housing market outside of large-scale accommodation (Huke 2021a; 2021b). It is therefore not surprising that experiences of marginalization and exclusion play a central role in the narratives of refugees, experiences with which the people concerned deal actively and in a self-determined manner (Dinkelaker et al. 2021; Jakob 2016; Schacht 2021).

1.1 Stories of Discrimination and Marginalization

The following observations and analyses are based on qualitative field research conducted on local dynamics of refugee solidarity work in two German cities that are approximately comparable in terms of population size and social structure: Jena (in the state of Thuringia) and Konstanz (in the state of Baden-Württem-

berg), both of which joined the coalition of *Safe Harbour Cities*[4] at the end of the 2010s. As part of the research, I conducted more than forty semi-structured narrative interviews with different actors including full-time and voluntary workers, refugees, and political decision-makers who were involved in and actively shaped the events during and after the "summer of migration." With the help of the interviews, it was possible both to trace the local dynamics in the two cities since 2014–2015 and to reconstruct concrete solidarity practices in refugee work (Grau, in press).[5]

Experiences of marginalization and discrimination played a central role in numerous interviews with refugees and only a few aspects can be singled out in this section. These interview partners repeatedly reported on their difficulties in shared accommodation. The collective accommodation with others and the lack of autonomy in organizing everyday life (in some cases, even the impossibility of preparing meals independently) inevitably led to crisis situations and conflicts, as described by an Afghan refugee:

"Yes, in the accommodation [...] [it] was really difficult, because you have to be in a room with two others. And there are few rooms for just one person. And that's why [it] happened once, [...] because there are two ethnic groups in Afghanistan and they have a small conflict, [...] in the accommodation [they] fought and [the] police arrived. So, the situation, the people being in one room, was quite unpleasant. Many tried to deal with [the] others, but anyway the conflicts, bad moods, and shouting came. And sometimes this situation escalated; [...] I think one reason why [...] people had conflicts in [the] accommodation was [that] they don't have language courses, they don't have the possibility to go [outside] [...], they didn't know how to keep [themselves] busy."[6]

In addition, the lack of contact with the host society, language barriers, practices of othering, and experiences of racism are central themes in many of the stories, as this interview excerpt with a man from Syria living in Thuringia clearly shows:

"And we were like real strangers, with no contacts, and people don't know us. If we want to explain something, that was difficult, yes. For example, why are we there? [...] We were unknown, so [the locals were] without information. Refugees? What is that? That was definitely difficult for the other side. I understand that too. A stranger comes for example, [and] I can't explain why

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4 The Germany-wide Safe Harbour (*Sicherer Hafen*) Movement calls for safe places for refugees since 2017. Cities and municipalities that declare themselves safe harbors are committed to a humane migration policy and agree to take in more people than allocated by official distribution quotas for refugees and provide them with humane care and social participation (see https://seebruecke.org/sichere-haefen/haefen (accessed 29.8.2023)).

5 In addition, excerpts of the interviews have been successively prepared for a broad public on the web portal www.solidaritaetsgeschichten.de since January 2023.

6 All interview excerpts cited below were translated from German into English by the author.

I'm here. [...] Some people [asked], and when we said 'refugee': 'What do you mean by refugee?' We said, 'from Syria.' 'Where is Syria?' People [...], well, actually [are] not interested anymore."

Or consider the narrative of this Syrian mother of a teenager:

"[A] problem happened with my son; [...] a German woman told him: 'Why are you here in Germany? Go back [to] your home country,' and my son was sad. And he is afraid of strangers."

Huke (2021a; 2021b) has underscored that refugees rarely encounter understanding and goodwill, especially from the authorities; rather, illegal practices anchored in bureaucratic routines are widespread. In the interviews conducted in Jena and Konstanz, refugees as well as supporters told of their ongoing disputes with authorities about basic rights regarding residence, access to healthcare, family reunification, and so on.

A volunteer who has been active in Konstanz for a long time also problematized how material precarity further aggravates the isolated situation of refugees:

"Many single young men, it has to be said, [...] I know this from my experience as a social worker; [...] when I did social work in a refugee shelter for 30 years, I always noticed that the refugees don't know where to go. They have no [...] meeting place. They [...] have no money to take part in cultural life anywhere, and they have no friends."

However, it is often precisely in these marginalized spaces and constellations that new possibilities of utopian societies are conceived and different approaches to their realization are tried out. In view of this argumentation and in order not to go beyond the scope of this article, I will focus on the concrete initiatives I investigated during my field research that have emerged as a result of the "pull effect" (Dinkelaker et al. 2021, 8) of the *summer of migration* or the *welcoming culture*[7]. The further argument is guided by an analytical framework outlined by Agustín and Jørgensen (2019), which conceptualizes solidarity as a practice "situated in space and time and organized in multi-scalar relations; and [...] linked in different ways to institutions" (Agustín and Jørgensen 2019, 25–26). All the practices reconstructed here on the basis of my field research draw from collectives in which people with different motives for action (Fleischmann 2020) mostly met for the first time, even as many had lived in the same city for years. For many, this "alliance building among diverse actors" (Agustín and Jørgensen 2019, 25) including refugees and non-refugees also meant crossing habitual milieu boundaries and resulted in new social spaces of encounter. In the following, I examine concrete

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7 Even if the term *welcoming culture* was already in use before the *long summer of migration*, it is more closely associated than any other with the strong collective wave of civil society support to refugees in the period 2015–2016 and its reflection in the leading German media (Becker 2022).

solidarity practices from the field research, situating each in its particular context.

2.   Solidarity Practices and Coalitions in the Municipalities

The following observations also represent excerpts from the empirical material of my field research in Jena and Konstanz. I have chosen practical examples that are both suitable for an intersectional analysis and touch on aspects of social cohesion. In the following, I first examine the Konstanz initiative *83integriert* in more detail and then the low-threshold counselling space *WeltRaum* in Jena.

2.1 *83integriert*—housing for refugees in the middle of the host society

At the beginning of 2015, a group of Konstanz citizens founded an initiative to find rooms or apartments on the private housing market in the municipality of Konstanz for officially recognized refugees. They combined their search for potential landlords with a local publicity campaign called *83integriert* ("83integrated"), which aimed to both attract potential landlords and to influence public opinions among city residents. At the time, Konstanz had about 83,000 inhabitants. If, according to the initiative's founders, one person for every 1,000 inhabitants provided accommodation to a refugee, then 83 refugees would have a better chance of integrating into society than in a collective accommodation.

2.1.1 Private Housing as an Integration Opportunity for Refugees

It was already demonstrated that long-term accommodation in collective housing brings with it a structural experience of marginalization. Apart from the problems briefly outlined above, the concentrated population of refugees reduces opportunities for exchange with the established population and for familiarization with the national language and the customary practices of the country of arrival. The founders of *83integriert* aimed to counteract this situation. Their concern was to promote housing for refugees in the middle of the host society (and not isolated from it). They wanted to both accelerate and improve the process of arrival and settling in for refugees and to multiply opportunities for encounters between established city residents and new neighbors.

The initiative was also concerned with finding the most suitable housing possible. The staff spend a lot of time considering the needs and preferences of housing seekers and landlords from the outset, before the two parties got to know each

other personally. In particular, the family constellations play an important role in the search for housing. Housing for large families is scarce in Konstanz, such that refugee families usually have to move to the surrounding communities and to a new environment (new schools, childcare facilities, etc.).[8]

2.1.2 Systematic PR Work Among City Residents

With a view to social cohesion, what is special about the initiative is that it combines the concrete work of housing placement with targeted PR work that is directed at the broad urban society and consciously strives to reach beyond the circle of those already involved. In the initially broad local publicity campaign, the initiative relied on formats that could have an irritating effect. For example, light symbols with the number 83 were projected onto emblematic buildings in the city center of Konstanz (such as the cathedral, the university, or the minaret of the mosque). The fact that the group was made up of established Konstanz residents who had key contacts in the city contributed significantly to the success of these actions. The group also launched a photo campaign in dialect, in which representatives of various professions and well-known municipal figures (mayor, members of the fire brigade, etc.) had themselves photographed with the sign "Zsamme gohts bessr" ("Together works better" in local dialect). According to one of the initiators, this campaign "of course [raises] attention quite well. But on the other hand, it sends a signal to many levels of society. Obviously, the key people here, [a] large part of the population—the employers, the employees, a broad bouquet from all levels of society—think it's good that the refugees are being helped." The activists thus deliberately addressed different groups within the urban host society who in the PR campaign speak out as supporters of the common cause to stand in solidarity with refugees, regardless of their different social affiliations.

2.1.3 A Paid Position is Created for the Housing Service

The commitment in the early days was based exclusively on the voluntary work of the founders, who put their professional obligations on hold for some time in order to build up a well-functioning association within a few months—a situation that could not be maintained over the long term. Since 2017, the Konstanz municipal council has financed a paid position that is responsible for acquiring rooms, arranging, and supporting tenancies, as well as for public relations work. This has made it possible to stabilize and professionalize the association's work, although

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8 In an interview, the owner of several flats in Konstanz said that he deliberately rents them to refugee families, knowing that the latter are particularly disadvantaged in the local housing market.

voluntary work remains indispensable.[9] The two staff members who have shared the paid position since that time also intervene in conflict situations, although most tenancies go smoothly. Usually, conflicts relate to minor problems, such as waste separation or different cooking habits: "An Afghan family of five [lived] on the ground floor, and they cooked a lot [...] and the foreign smells and so on, so there was also a pensioner, but then in the end they are often very nice, if you just listen to them [...] so we installed an extractor hood and everything was good."

In addition, cooperation with local authorities has expanded in recent years. *83integriert* has been responsible for the *RAUMTEILER* project since 2021, together with the Social Welfare Office, the Youth Welfare Office, and the Citizens' Advice Bureau. Here, too, the focus is on the acquisition of privately rented housing and reliable support for tenancies. All Konstanz residents, including refugees and non-refugees, who are unable to find a home on the tight local housing market can be supported in this way.

2.1.4 In a Network with other Welcoming Initiatives

83integrated is embedded in a network of local initiatives for refugees, including *Café Mondial* (a meeting place for new and old Konstanz residents), the *Refugee Law Clinic*, and the *SaveMe Konstanz* association, which offers a wide range of support services including sponsorship, language classes, weekly meetings, a bicycle repair shop, and so on. For example, *Café Mondial* is usually the venue for meetings between people looking for housing and landlords. Existing informal networks guarantee a rapid flow of information that also reaches refugees. On the basis of their close cooperation, these welcoming initiatives, supported by the city government, have been shaping a local field of experimentation in Konstanz since 2015 "for new forms of coming together or even living together between established residents and newcomers, which contain the potential of a radical cosmopolitanism"[10] (Kron and Maffeis 2021, 171).

2.2 *WeltRaum*—a Low-Threshold Counseling Space Emerges from an Informal Initiative

In 2013, more refugees started coming to Jena, and in 2014, an initiative of *Flüchtlingsfreundeskreise* (refugee friends groups) were formed. Volunteers, some of whom had previous experience working with refugees or mobilizing against

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9 Dyk and Haubner (2021) analyze ambivalences and potential pitfalls in voluntary refugee support.
10 The original citation was translated into English by the author.

right-wing extremism (Grau, in press), joined together in informal groups and went to the collective accommodation with the aim of, as one interviewee put it, "build up a direct connection to our new neighbors [...] and that then led to us to go to the collective accommodation in 2014 and help there in a very practical way." "Yes, five or six people went there to make tea, you could do that in the kitchen, the social worker was open-minded, [...] brought a bit of pastry and then knocked on the door and invited people in," one volunteer recounted, "and sometimes there were more supporters than refugees, because of course they also had their reservations and didn't know what it was all about."

Over time, these weekly tea meetings developed into concrete support in everyday life: "Through this tea drinking [...] we initiated various things, German lessons, doctor's visits, all kinds of things," said another interviewee, "and it began that people could move into flats, that they needed things, furniture, clothes, all the things you need when you've been on the run and are new in Jena, more existential questions, too, doctor's visits, health insurance, dealing with authorities."

2.2.1 Meeting Spaces between Residents and Newcomers

This practice of *Flüchtlingsfreundeskreise*, which quickly became established in all of Jena's shared accommodations between 2014 and 2016, facilitated the first informal contacts between residents and newcomers. This gave newcomers the opportunity to gain new contacts beyond the usual relationships with actors in the migration regime. It was precisely these informal contacts with supporters (especially volunteers, in some cases also full-time staff) that refugees emphasized as central to their further development: "I learned a lot of legal things from Ms. X [...] one contact connects me to another contact, then I was at the *Flüchtlingsrat* (Refugee Council) in Erfurt and then at the *Refugee Law Clinic*."

2.2.2 Drinking Tea together in the Shelters as a Starting Point for Long-Term Support Structures

The *Flüchtlingsfreundeskreise* represented largely hierarchy-free meeting spaces between unequals and allowed for pragmatic needs-based support in everyday life. At the same time, these collectives were creative places and laboratories of new imaginaries and practices of refugee work. They gave rise to provisional practices, such as a clothes donation shop or the *Café Welcome* located in a church parish. Other initiatives that emerged from the refugee friends groups were able to establish themselves in the long term and have transformed the landscape of refugee work in Jena. Since 2015, for example, the volunteer-run Welcome Meeting has

been held regularly in Jena's city hall. This meeting is understood as a place for networking and exchange between a wide range of civil society and municipal actors working with refugees, and it embodies a broad solidarity coalition by connecting different spaces. It should be emphasized that, thanks to the Welcome Meeting, very different people from the urban host society connected with one another, "people who had never been to something like this before or had seen each other for the first time and who got into a really profound exchange," as one of the co-founders described it.[11]

Since 2015, the *WeltRaum* meeting point has developed into an emblematic place of encounter between refugees and non-refugees alike in Jena. Its founders knew each other from the refugee friendship groups, and the initiative took shape together with refugees from the beginning. Today, *WeltRaum* is a low-threshold counselling space in Jena's city center, open daily in the afternoons from Monday to Friday. Rent for the space is paid by the city. Counselling is offered in Arabic, German, English, and Kurdish on all kinds of issues (from child benefit applications to job searches, family reunification, residence rights, and crisis intervention). The *WeltRaum* mainly supports people from Syria, due to the fact that other refugee groups have different residence statuses and because it is primarily refugees from Syria who work at *WeltRaum*. In conversations with refugees from Syria or Iraq living in Jena, I was regularly told that *WeltRaum* was a place they enjoyed visiting. Even refugees from surrounding rural districts use the counselling services at *WeltRaum*. The situation is different for Afghan refugees: they "have no time to go to counselling during the day because they have to try to work around the clock so that they can somehow get a residence status," explains a volunteer, "they hardly get any welfare payments, they only have access to basic healthcare in Germany under difficult conditions. And they are constantly threatened with deportation or the menace of deportation." Since 2022, refugees from Ukraine have also been arriving at *WeltRaum* on a sporadic basis, but their presence remains marginal. The humanitarian residence title available to Ukrainian refugees thanks to the EU Temporary Protection Directive gives them EU-wide access to work, education, social benefits, and medical care, so that many common problems addressed in the counselling services at *WeltRaum* are not relevant for this group.

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11 Another example is the association Thüringer Flüchtlingspaten e. V. (Thuringian Refugee Sponsors), which organizes donation-based family reunification from Syria and, since 2023, also from Afghanistan, within the framework of the Thuringian State Reception Program: https://www.fluechtlingsrat-thr.de/sites/fluechtlingsrat/files/images/Themen/2022%2011%2004%20Thüringer%20Aufnahmeanprdnung%20-%20Merkblatt-%20Aufnahme%20afghanischer%20Verwandter.pdf (Last accessed on April 10, 2024).

2.2.3 Cooperation on an Equal Footing

The only paid position at *WeltRaum* is held by a former refugee, and the same applies to the two federal voluntary service positions (*Bundesfreiwilligendienst*), which are filled with equal numbers of men and women as far as possible. For example, a single mother of several children who had fled Syria was able to acquire semi-professional work experience at *WeltRaum* thanks to the voluntary service position. In the interviews, many people engaged in work with refugees emphasized the importance of specifically providing refugee women with language, cycling, and swimming courses, etc.[12] Women, especially if they have children, tend to be the ones responsible for family and household chores, which makes it much more difficult for them to learn the German language or enter the job market, etc. In a group interview with refugee women, concerns about relatives left behind in the country of origin, the well-being of their own children in Germany and especially their experiences at school, but also the difficult access to the labor market and the language skills required for this were frequently mentioned challenges. For many adult refugees (regardless of gender), learning a completely new language is an enormous challenge, and those who already were exposed to foreign languages in their country of origin are at an advantage.

At *WeltRaum* the counselling and support work is supplemented by volunteers. These volunteers tend to be mostly women from the host society, who are only partially or not employed and can dispose of their time relatively freely. The intensive voluntary work is possible because of special material conditions. This is one reason, among others, why only a small fraction of those who helped build *WeltRaum* in 2015 are still active in the project today. Nevertheless, a structural cooperation has been realized over the years that may come close to what Karakayali calls "practical reciprocity" (Karakayali et al. 2021, 105).

In summary, a certain fragility of the *WeltRaum* should not be ignored: the single paid employee position is financed through state funds, which must be reapplied for annually, and the city must cover the rent costs. Finally, a large part of the workload is covered by volunteers whose life situations are mostly unburdened by work on the labor market. At the same time, in view of the consistently high demand for services, there is a need to create more permanent positions.

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12 See examples on the web portal www.solidaritaetsgeschichten.de, in particular *Miteinander in Konstanz* and *Xenia*.

3. Conclusion

Departing from refugees' experiences of structural marginalization, this chapter has investigated solidarity practices that emerged during the *long summer of migration* in Jena and Konstanz. In both cities, new alliances were established that connected actors in multi-scalar relations and developed local solidarity practices to accompany refugees. The chapter examined practices that still exist today and have had a lasting impact on the local landscape of civic work with refugees. It explored how these practices create new social spaces of encounter and cohesion between refugees and non-refugees in a city, and between different languages and realities of life, which can counteract the effects of marginalization and which represent pioneering islands of "solidarity in a world of inequality" (Bude 2019, 250). Such spaces transcend existing lifeworlds and social milieus and connect people who have often lived in the same city for years but have not met before. In the process, the perception of the society in which they live changes for all participants. Refugees can more easily familiarize themselves with the codes of the host society, and the members of the host society, in contact with the refugees, expose themselves in worlds that were previously foreign to them. Precisely because they stand up for concerns and issues that go beyond their own personal interests, many experience a process of politicization, precisely because they become aware of the arbitrary practices of the "migration regime", among other things. With these inclusive forms of practice, the actors involved also influence public opinion among city residents, offer refugees a voice, and reduce the resonance of racist discourses (Grau, in press). The *83integrated* campaign "Zsamme gohts bessr" was a particularly striking example of this. Further, the example of *WeltRaum* showed how the different legal residence statuses fundamentally influence the development opportunities available to refugees and how existing counselling services cannot do justice to all groups in the same way. It became clear from the case studies that establishing salaried positions or covering the cost of room rents is crucial for the continuation of these practices. In this way, people seeking refuge in Germany can be empowered and professionalize themselves (see the example of *WeltRaum*). Fundamentally, this opens up job prospects for all those who depend on gainful employment and lack the time for long-term voluntary engagement in refugee solidarity work. Although the administrative authorities also recognize the effectiveness of these practices—as shown by the extended cooperation between *83integrated* and public administration—these often shaky and short-lived constructions continue to rely heavily on volunteer labor and remain precarious and fragile in the long run. In the face of (trans-)national polycrises and the rise of right-wing extremist ideologies, it is all the more important to support and stabi-

lize these laboratories of coexistence between unequals, which always depend on negotiation and dialogue.

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Embracing Diversity of Knowledges through Community-Based Participatory Health Research: Ongoing Challenges and Emerging Possibilities

Tanja Gangarova

Abstract

Community-Based Participatory Research (CBPR) is a research approach that holds the potential to democratize knowledge creation by increasing the participation of historically marginalized communities in the research process. However, while CBPR is premised on democratic values, it is not separate from social structures that uphold unequal power relations, and it is therefore not immune to reproducing inequalities. Drawing from literature on decolonization and participatory approaches, as well as from insights gained through my own research practice with communities affected by racial injustice in Germany, I reflect in this article on the democratizing potential of CBPR. I thereby seek to demonstrate how decolonial learning can be tangibly incorporated into research methodology and overall research practice. Specifically, I argue that a critical application of CBPR offers pathways for addressing epistemic injustice embedded in academic institutions and traditional research processes. Postcolonial readings of CBPR provide another powerful approach to confront epistemic injustices, including in CBPR.

Keywords: CBPR; knowledge democracy; participation; decolonization; epistemic justice

For many Black and Afrodiasporic people as well as others affected by coloniality and knowledge production as the practice of Western academia, academic research has never been neutral, objective, or impartial. The Eurocentric notion of science itself is integral to colonial violence inflicted through disciplines as diverse as medicine, sociology, and anthropology (Smith 2021; Lenette et al. 2022; Siouti et al. 2022). As Linda Tuhiwai Smith (2021) writes, "In a very real sense research has been an encounter between the West and the Other." (8) Historical and current abuse of research has therefore fostered mistrust within communities affected by racial injustice and magnified power imbalances, whereby research data has been extracted from communities, rather than co-created, shared, or used for their needs (Wallerstein et al. 2018). Recently, an increasing number of scholars around the globe have raised concerns about the treatment of racially marginalized communities in research and have made efforts to redress its colonial legacy (Seehawer 2018). One central approach in this regard lies in the attempt to delink research from Western thought and academic imperialism through processes of knowledge decolonization, defined by Bagele Chilisa (2012) as "conducting research in such a way that the worldviews of those who have suffered a long history of oppression and marginalization are given space to communicate from their frames of reference" (30).

Community-based Participatory Research (CBPR) has become understood as a research approach that has the potential to challenge epistemologies of ignorance inherent to Western academia (Mills 2007). It has been designed to actively increase the participation of those who have previously been the objects of research but rarely the beneficiaries of its results. By including marginalized perspectives in all aspects of the research process, CBPR aims to embrace a diversity of knowledges and therefore to promote knowledge democracy (Hall et al. 2020; Santos 2015). CBPR as an explicitly value-based approach goes hand in hand with the struggle for social justice (Odukoya et al. 2023). As such, it could be seen as a contribution to inclusive societies, and thus to social cohesion. Even though CBPR advances research agendas that are inclusive, it is affected by social structures creating unequal power relations and therefore it is not immune to reproducing inequalities—including racism (Muhammad et al. 2018).

Drawing on theories of knowledge decolonization and literature on participatory approaches, this paper critically examines the democratizing potential of CBPR in health, both discursively and methodologically, with a particular focus on issues of participation, knowledge creation, and knowledge translation. In the first section, I provide a brief overview of the history of academic research of racially oppressed communities and introduce CBPR and its core principles. Building on literature and insights gained through my own research, I then reflect on the opportunities and tensions presented by this approach. Ultimately,

I explore tangible ways to incorporate decolonial learning into overall research practices and methodologies.

1. Positioning Myself

I write this article as a researcher who has worked for the past ten years in different CBPR projects with communities affected by racial and other injustices in Germany, including migrants, refugees, sex workers, and drug users. These projects were largely but not exclusively in the field of HIV/AIDS. In my many roles as a queer migrant and activist, facilitator, project coordinator, and researcher, I have learned through the generosity of the communities with whom I have worked. This work has shown the ways in which the understandings and applications of CBPR are marked by systems of oppression, institutional power, and structural violence. I have witnessed how the participation of communities in all stages of a research process can lead to improved and more relevant research. However, I have also witnessed tokenistic and misused participation. With these lessons learned, I see the critical application of participation of oppressed communities in research as a crucial step to address power inequities and maintain that this approach holds the potential to democratize research.

2. Histories of Research on Communities Affected by Racial Injustice

Historically, the practice of Western academic research on communities affected by racial injustice has been coercive, deceptive and at times, harmful. Western academia has justified slavery, negated the humanity of racialized individuals and communities, and 'proved' the racial superiority of White people (Savitt 1982; Washington 2007). The experiments of Robert Koch in East Africa (Bauche 2017) and the Tuskegee Syphilis Study in the United States (Kim and Magner 2018) are only two of numerous examples of unethical medical research that have caused physical and material harm to racialized communities. Further material and discursive disadvantages are reinforced by misunderstandings and misconceptions of Western academic researchers, often expressed in their scholarly narratives (von Unger et al. 2019).

These harms have been described by Kirstie Dotson (2014) as "epistemic oppression," a term that aims to theorize the ways in which specific population groups are suppressed in their power to contribute to shared knowledge creation. This adds to a new domain of inquiry and explanatory power to the rich

tradition of anti-colonial theory on epistemic violence (Santos 2015; Spivak 1988). Western knowledge systems are reified and legitimized through the exclusion of marginalized voices and knowledges. In the context of health inequality research, white supremacist approaches have informed the "techniques and processes of reasoning about social facts" (Zuberi and Bonilla-Silva 2008, 17). As a result, what is thought of as objective or positivist methods of knowledge production—described as "White methods" (ibid., 2008)—are often promoted by scholars under the guise of neutrality and colorblindness.

Producing knowledge about the Other has been a lucrative endeavor for many professionals. Most recently, this has been evidenced by the increased funding given to predominantly White academic institutions during the COVID-19 pandemic to "address racial disparities" (McFarling 2021). As Petteway (2022) explains, racialized communities are "being mined for data that can then be (re)presented by the disproportionately White credentialed researcher as 'new', as 'theirs', and importantly, as legitimate knowledge" (5). Regarding the historic processes of the colonization of knowledges, Smith (2021) states that this supposedly new knowledge, the transformation of indigenous knowledge, and the nature of what knowledge is considered legitimate "became as much commodities of colonial exploitation as other natural resources" (68).

Some core questions then become, "How do we move away from a historic and present 'normal' of colonizer as curator?" (Petteway 2022, 6) and how do we reimagine a knowledge production in health research that is "on the way to decolonization" (Dotson 2018, 190)? How do we open up distinct canons of knowledge and delink from Western thought as the only framework or possibility for knowledge (Mignolo and Walsh 2018; Santos 2015)? How do we enact decolonization in knowledge creation in a way that provides space for research participants to heal, to demand what rightfully belongs to them, to build on their strengths and to create new, transformative research practices (Smith 2021; Tuck et al. 2008)?

3. The Origins of Community-Based Participatory Research and Its Core Principles

According to Budd Hall (1992), one of the early founders of global participatory research, CBPR "is about who has the right to speak, to analyze and to act" (22) and arose partially in response to historic and current research abuse of oppressed communities. CBPR's foundations are anchored by a cyclical dialogue/action/reflection approach to critical consciousness, pioneered by Brazilian educator Paulo Freire and other Global South movements with the goal of fostering knowledge

democracy (Wallerstein and Duran 2018; Freire 1982; Santos 2015). In contrast to positivist research paradigms, which consider knowledge production as neutral and value-free, CBPR views knowledge as historically and socially constructed (McTaggart et al. 2017).

CBPR, as defined in health, relies on conducting research *with* rather than *on* members of marginalized communities by actively involving them in defining the research questions, in data collection and analysis, and in interpreting and disseminating the research findings. The overall goal of CBPR is to take action towards positive change (Minkler and Wallerstein 2003). CBPR actively strives to challenge power relationships in the research process, by seeking to reduce the distinction between 'researcher' and 'researched' (Wallerstein et al. 2018). CBPR core principles, as developed by Israel et al. (1998; 2013), help further articulate how CBPR differs from conventional research approaches. CBPR starts from community priorities and builds on community strengths, promotes empowering and power-sharing process, and fosters co-learning and capacity building. Furthermore, it applies the principle of "cultural humility," a commitment to self-reflection and critique that includes examining one's own positions of power and privilege, that is, how race, gender, sexual orientation, social class, and culture affect the research process (Minkler et al. 2012).

CBPR promotes the centrality of knowledge democracy. Inherent to this concept is the acknowledgement of the existence and importance of multiple forms and expressions of knowing, using knowledge as a powerful tool for social change, and sharing knowledge through multiple open access sources (Hall et al. 2020; Wallerstein and Duran 2018). CBPR explicitly seeks to decenter hegemonic epistemologies and holds the potential to challenge standardized research protocols and address power inequities in knowledge production. Growing numbers of literature reviews demonstrate that CBPR can have an important positive impact on health outcomes and improve knowledge translation in marginalized communities (Ortiz et al. 2020; O'Mara-Eaves et al. 2015).

Even though CBPR is premised on democratic values, it is not untouched by the social structures that perpetuate unequal power relations. The positive impacts of CBPR are constrained and limited by widespread racial inequities embedded in research and funding institutions (Flicker et al. 2007; Creary 2021; Woolford et al. 2019). Studies focusing on the evaluation of participation by community partners in CBPR projects reported shortfalls in establishing democratic research praxes (Guta et al. 2013; Catalani and Minkler 2010). CBPR scholars are therefore increasingly calling to address power in research practices (Wallerstein 2020) and to pay attention to the neoliberal appropriation and tyranny of 'participation', which remains on the rise (Cooke and Kothari 2001). These calls are

crucial, especially because "the potential to reproduce colonizing ideologies and colonizing perspectives is always present" (Smith 2021, 224).

In the next section, I briefly introduce the most recent CBPR study in which I participated as a researcher, highlighting key takeaways from our team experiences. Focusing on issues of participation, knowledge creation, and knowledge translation, I discuss more generally the pitfalls and opportunities of participatory work.

4. Community Perspectives on Racism in German Healthcare: A Case Study

While racism has been extensively researched and recognized as one of the social determinants of health inequalities in many parts of the world, there are hardly any valid studies on healthcare-related racism in Germany. Only a few studies provide selective insights. What is missing in the existing literature, with a single exception (Aikins et al. 2021), are the perspectives of racialized communities. The study I introduce here was initiated to contribute to closing this gap. It was carried out in the frame of my work at the German Centre for Integration and Migration Research (DeZIM). The collaborative efforts took place between October 2021 and March 2023, with the aim of exploring healthcare users' experiences of racism in healthcare, further developing the theoretical concepts of racism in the field, and developing recommendations for anti-racist approaches. Following a CBPR approach and sharing Fals-Borda's (1995) argument that scientists have the duty to extend the "we" who constitutes the researchers, it was crucial to me to have partners or peer researchers from communities affected by racial injustice on the research team. A core team was formed, consisting of myself, as a representative of my research institution, and two peer researchers (Roche et al. 2010). The peer researchers were trained by me and two scholars in research ethics and data protection, study design, research methods and moderation techniques, and data management and analysis, and they were employed on an hourly wage basis for the entire duration of the project. The recruitment of 14 study participants—Black, African and/or people perceived or self-describing as 'Muslims'—was supported by the existing networks of the peer researchers. A maximum diversity sample was employed meaning that study participants were chosen to include lived experience of racism by considering other intersectional factors such as age, gender identity, sexual orientation, education, language, residency status, and health concerns. Data collection comprised six focus groups, with each session building on the former one. These focus group sessions were conducted over three months

and were 90 minutes long. Their facilitation was dialogically shared by the peer researchers and me. A democratic approach to qualitative data analysis was applied by adopting the DEPICT model (Flicker and Nixon 2014), and MAXQDA software 2022 was used for data analysis and management. The theory was built inductively, while drawing on key concepts from postcolonial theory. Our team was supported by an advisory board, consisting of three independent scholars (two of color) specialized in research on migration and racism and participatory health research.

4.1 Participation: The Importance of Self-Determination

Prior to the study's initiation, I was employed by the National AIDS Organization. During this time, I coordinated several CBPR projects with migrant communities and therefore had pre-existing relationships with migrants' organizations in different German states. It was through these networks that I recruited peer researchers and study participants. Proxy trust, that is, having my integrity vouched for by respected community organizations, was invaluable to the recruitment process (Lucero et al. 2021).

In line with CBPR, I was invested in applying a relational approach to power and participation, considering participation as a means for re-distributing power-relations (Fals-Borda and Rahman 1991). Drawing on the work of indigenous theorist Eve Tuck (2013), who teaches that "deep participation […] invites people to help define the scope of discussion, the rules of engagement, and the structure of relationships" (11), it was important to me to ensure that peer researchers and study participants are free to make choices about their participation at all stages of the project. This was facilitated by creating spaces for collective dialogue and relationship negotiation, by actively listening and ensuring that everyone's involvement was fully informed and that everyone was aware of the benefits and risks to themselves and their community.

The peer researchers and I agreed to meeting times and working packages that considered their life circumstances and availability. As part of the training units, the research design was jointly revised, such that initial research questions formulated in the study proposal were refined in significant ways by the peer researchers. As recommended by the advisory board, the history of Western academic research on racially oppressed communities was included as part of the training units. During our conversations about the historically grown distrust of research in their communities, the peer researchers developed strategies to establish trust partnerships with potential participants. These strategies ranged from communicating our motivation for initiating the study and information on our

backgrounds and identities to the creation of multilingual flyers about participants' rights in research (including the right to say "no" to research) and the organization of introductory meetings with interested community members, which allowed potential participants to define the fundamental parameters of their engagement.

We agreed on participants having the option to decide whether, how, and which personal data may be collected, interpreted, and published, and that their participation should include flexible points of entry and exit. The participants were introduced to different data collection methods. Most of them expressed preference for focus groups, as the method promotes exchange of individual experiences and the building of collective strategies. Two participants expressed that they would feel emotionally safer giving individual interviews. In the end, we used a hybrid of methods, in line with both CBPR and qualitative research traditions that see research as a practice of montage (Denzin and Lincoln 2011). We decided to financially compensate all study participants for their valued time, knowledge, and "the emotional labor" invested by sharing of experiences with racism (as one participant put it). I collaborated with the finance department to ensure adequate and anonymous compensation.

What I have learned from this experience is that truly working toward knowledge democracy means not only engaging representatives from racialized communities in the research process but recognizing that participation itself requires autonomy and the freedom to decide how to participate. This process starts with acknowledging the legacy of damage done to these communities by White academia and our own roles (as researchers) in the structures that uphold epistemic injustice. It requires the active and ongoing creation of spaces for shared decision-making and the negotiation of trusting relationships. Here, listening plays a vital role (Bion 1962). Beyond relationships that demonstrate co-governance, sharing power means establishing sufficient resources and attention to the life realities of participants and peer researchers (Sanchez-Youngman 2021).

4.2 Knowledge Creation: Embracing Other(ed) Knowledges

Following CBPR, inspired by Tuck et al. (2008) and Smith (2021), I wanted to work against research practices that only position the communities I worked with as marginal. I was interested in learning from the peer researchers and study participants and committed to dialectical theory-building, to co-theorizing based on their situated knowledges (Haraway 1988). As Tuck and Yang (2014) teach, "theorizing with [...] repositions Indigenous people and otherwise researched Others

as intellectual subjects rather than anthropological" (ibid., 308). Thus, I carefully crafted interactive and pedagogical methods that enabled opportunities for negotiating meaning and collaboratively building theory. Together with the peer researchers, we decided to work with DEPICT, which created an accessible way to include diverse perspectives and experiences in data analysis. We coded the focus groups and interview transcripts, associated narratives by theme, and discussed the meanings of each theme as exemplified by quotations. We productively theorized racism in German healthcare by putting narratives produced by study participants in the focus groups and interviews in conversation with Gayatri Spivak's (1988) and Edward Said's (1978) writings on Othering. I was surprised by how introducing the theories enabled the peer researchers to connect deeply with the data through a shared language for something already deeply known by them. By integrating feedback loops with the project participants, we were able to further diversify the epistemic standpoints from which data was analyzed and therefore to confront Othering in data interpretation and data representation.

At times I was challenged in the research process. I have a vivid memory of one peer researcher reflecting critically on Othering effects embedded in CBPR itself—by assigning subject positions to community partners as 'peer researcher', and thus positioning them as different, as 'Others'. Spivak (2005) teaches us to challenge these ambiguous categorizations by understanding the processes by which they come into being and their discursive and material effects. It was the same peer researcher who pushed me to think more about the impact of definitions by suggesting that we (as a core team) read the work of Grada Kilomba, a postcolonial theorist and writer who focuses on the connection between power, racial authority, and scholarship. In her book "Plantation Memories", Kilomba (2010) states: "They have facts, we have opinions; they have knowledge, we have experiences" (ibid., 28). The peer researcher was pointing to the definition of peer researchers as persons with "lived experience".

Something shifted through these moments of collective reflection. The peer researchers started refusing words widely established in CBPR in health. This was a powerful act of reclaiming, of "researching back" (Smith 2021) by "taking back words" (Tuck et al. 2008, 68) that have been used to disempower them: the terms 'peer researcher' and 'community experience' were collectively changed to 'co-researcher' and 'community knowledge'.

The dialogical process of analyzing the data allowed us to learn from one another, to challenge each other's thinking, to reflect collectively as partners, and to become disruptive and adaptive. This should be replicated in current approaches and language applied in CBPR, which should be revised in an ongoing manner to better align with its ideal for democratization. This process was supported by putting forth a postcolonial analysis—informed not least by including other(ed)

literature—which emerged organically from our collective work during data analysis.

4.3 Knowledge Translation: Diverse Modes of Knowledge Dissemination

As a CBPR scholar, I work across the academic institution-community boundary and am thus accountable to academic as well as to community audiences. I have learned from previous projects that my commitment to community partners should be as real as any academic institutional pressures. Drawing on Hall et al. (2020), who teach us that the achievement of epistemic justice and knowledge democracy implies the dissemination of knowledge in diverse ways and experiences, it was important to me that the co-researchers were engaged in the shaping of the dissemination process to give back to the communities.

A dissemination plan was jointly created following the final DEPICT step and guided by the questions "Who needs to know what?" and "How do they need to hear it?" It included academic, policy-driven, and community-focused outputs. The co-researchers expressed their curiosity and interest in collaborative writing. We co-authored conference papers, reports, and journal articles. I felt privileged for this opportunity. However, writing within spaces where traditional research frameworks are valued complicated our research relationship. The academic editing and scientific peer-review process pushed for statements from co-researchers and study participants to be removed in order for the articles to be published, leading to a loss of active participation. There were also demanding academic and organizational deadlines for the revision of scientific publications, which posed major barriers to the co-researchers to actively (re)write their parts. Further complications were faced at scientific conferences. It was rarely possible to ensure a safe space for the co-researchers to present the study results, even when arrangements were made in advance with session organizers. The co-researchers were repeatedly confronted with questions clearly conveying hidden insulting messages, including dismissive looks and tones by attendees, and their remarks were ignored by some session organizers. These micro-aggressions serve as subtle forms of epistemic violence by silencing people or implicitly encouraging them to limit their speech (Dotson 2011).

In response, spaces for reflexivity and co-researcher support—in the form of feedback loops within the core team, with the advisory board, and with external supervision—were enabled throughout the study. It was crucial to openly name and discuss experiences of power imbalances and privilege, including those in which I (as a researcher) benefit from. Identifying strategies for achieving a more equitable balance of power, and for preventing loss of participation and the si-

lencing of the co-researchers, was an ongoing process. We revised our dissemination plan to include more community events and decided to engage in a follow-up project and to visualize our project results by applying art-based methods. In so doing, we aimed to increase ownership of the study by co-researchers and study participants and to ensure a knowledge translation approach that honors community leadership. Negotiations with our funders were initiated to structurally enable these implementations.

As this article was written in the negotiation phase with funders, no more resources were available to engage the co-researchers in the writing process, which would have constituted an unpaid activity for them. Thus, even in this article, in which I present some facts on behalf of the peer researchers, reproduces epistemic privilege. Power dynamics like these continually (re)shape our research outcomes. I am aware that a jointly written article would be different. Nonetheless, I choose to include my reflections on this study in my own constant learning about the democratizing potential of CBPR.

These experiences reinforced for me how power and privilege are entangled in knowledge creation and dissemination practices, fostering exclusions and divisions that cannot solely be transcended even by critical research approaches such as CBPR. While establishing a vivid culture of critical reflexivity is crucial and helps to facilitate collective dialogue and conflict resolution, we still live under structural and hidden constraints. To understand the complexities of participation, knowledge creation and dissemination, we (researchers) must critically examine our situated context and its potential to reinforce colonial attitudes and continuously revise our research practices.

5. Conclusion

A critical application of CBPR offers pathways for addressing epistemic injustice in academic institutions and research processes. In such an undertaking, it is essential as researchers to acknowledge our own part in the structures that uphold racism and to ensure a deeply ethical research process. Engaging and centering the needs and knowledges of racially oppressed communities, creating spaces for collective dialogue, inviting participants to define the rules of their engagement, listening, establishing sufficient resources, being critically reflexive, and the ongoing challenging of power dynamics within research teams are all integral to democratizing knowledge creation.

Postcolonial readings provide another powerful approach to confronting epistemic injustices, not least within CBPR. As our co-theorizing process demonstrates, including theoretical explanations that embrace other(ed) ways of know-

ing engaged co-researcher in "researching back" (Smith 2021) and refusing terms and definitions that are used against them. Most importantly, these readings illuminate how CBPR relates to larger structural factors that have the power to (re)shape research relationships and outcomes.

In conclusion, the democratizing and the (re)colonizing potential of CBPR exist simultaneously, and researchers applying this approach must engage critically and repeatedly with both. Simplistic approaches to CBPR may serve to obscure existing systems of domination and exclusion and to restrict our ability to dismantle them. We need to find the cracks in the system and to gradually widen them in order to maximize CBPRs societal contribution. Being able to contribute to knowledge creation and meaning-making are basic human capabilities and "fundamental to human well-being" (Fricker 2015, 87). By doing this work, we aim to create inclusive worlds.

Acknowledgements

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Intersectional Challenges to Social Cohesion: The Reciprocal Drive to Specify Research Terms

Vivian Buchholz

Abstract

This concluding chapter turns to the perspective of philosophy of science and critical theory of the social order to reflect on intersectional challenges to social cohesion in theoretical terms. It outlines controversies in current intersectionality research and considers materialist critiques of intersectionality that share with intersectionality research the goal of social justice. Including elements of a brief history of the term intersectionality, the chapter proposes to distinguish between different understandings of the concept while also considering overlaps. The bulk of the chapter discusses three intersectional challenges to social cohesion scholarship and formulates three proposals. First, it is necessary to differentiate the terms group, community, and society when thinking about social cohesion. Second, intersectionality research needs to understand that asking about the construction of identity and the constitution of the subject refers to different levels of analysis and to different epistemologies. Furthermore, intersectionality as a traveling theory needs to be adjusted to different local and historical constellations. Third and finally, analyzing the intersectionality of ideologies can help social cohesion research in its aim of contributing to a cohesive society.

Keywords: intersectionality; social cohesion; subject constitution; critique of ideology; philosophy of education

This concluding chapter turns to the perspective of philosophy of science and critical theory of the social order to reflect on intersectional challenges to social cohesion in theoretical terms. It outlines controversies in current intersectionality research and considers materialist critiques of intersectionality that share with intersectionality research the goal of social justice. Including elements of a brief history of the term intersectionality, the chapter proposes to distinguish between different understandings of the concept while also considering overlaps. The bulk of the chapter discusses three intersectional challenges to social cohesion scholarship and formulates three proposals. First, it is necessary to differentiate the terms group, community, and society when thinking about social cohesion. Second, intersectionality research needs to understand that asking about the construction of identity and the constitution of the subject refers to different levels of analysis and to different epistemologies. Furthermore, intersectionality as a traveling theory needs to be adjusted to different local and historical constellations. Third and finally, analyzing the intersectionality of ideologies can help social cohesion research in its aim of contributing to a cohesive society.

1.   What is it that Intersects? Categories in their Relation to Dimensions, Levels, Structures and Ideologies

Taking guidance from Bayad at al., whose contribution to this volume discussed dimensions, domains, and components of the notion of social cohesion, this concluding chapter aims to advance a systematization of the notion of intersectionality. Historically, the issues raised by the concept of intersectionality have taken shape in the interaction of civil rights movements with academic theorizing. The current scholarly debate on intersectionality is situated in a field of unresolved tension between philosophy and empiricism, so that intersectionality can be understood as a metaphor, concept, theory, method, methodology, or heuristic (see Forstenhäusler 2022, 80). Intersectionality is a concept from the field of feminist theory that addresses the interrelationships of social categories of difference. In this area, the contributions of Black feminism and Marxist, socialist and materialist feminism should be acknowledged. Both traditions are concerned with understanding how forms of social inequality correlate in specific ways with a hierarchical distribution of power. Moreover, they want to understand how certain categories of difference are connected in various dimensions of societal organization. Common to these approaches is a critique of explanations of discrimination that consider only one dimension of the social order or only one social category of difference at a time. They differ, however, in their assessment which categories

and dimensions are generative of discrimination. Further differences arise with respect to questions about whether social situatedness is a matter of individual identity constructions (micro level) or results from societal structures that determine the constitution of the human subject (macro level).

Discrimination can manifest in various dimensions of the social order, including economically, politically, and interpersonally. Some epistemological approaches also consider institutional, ethnic, cultural, symbolic, epistemic, linguistic, and discursive dimensions. Depending on which of these dimensions is addressed, researchers use terms such as exploitation, domination, marginalization, lack of representation, and stereotypes. Within these different dimensions, scholars focus on structures of power and domination as well as ideologies of inequality and their intersections. In their contribution to this volume, Ashour and Holz explained how Crenshaw (1989; 1991) introduced the term intersectionality. Stöcker's contribution referred to the legal dimension of intersectionality, and it should be noted that Crenshaw's concept is an explicitly legal one. As an early contributor to critical race theory, Crenshaw developed a critique of racism in legal practice and of the mono-categorical way of thinking that shaped the anti-discrimination law of the time. Her project is not to reject the law as an instrument, but rather develop it further to better contribute to the goal of civic emancipation (see Chebout 2012).

Discrimination, or unequal treatment based on social categories of difference, promotes the ongoing reproduction and maintenance of historically developed structures and ideologies of inequality and difference. Research about discrimination can make the effects and manifestations of such structures and ideologies visible since discrimination is the instrument through which people experience inequality in their everyday lives.[1] The question of how different categories of difference interact, however, is not considered to be clarified in studies of intersectionality, which is also a challenge to social cohesion research. Leslie McCall (2005, 1773 ff.) initially defines various possible ways of looking at the complex interrelationship of categories on a meta level:

– *Inter-categorially*, the intersection of several axes of difference can be analyzed,
– *intra-categorially*, the immanent diversity within a group needs to be recognized and
– *anti-categorially*, the legitimacy of group classifications is fundamentally questioned.

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1 I'd like to thank Janine Dieckmann for her participation in planning this article's structure as well as her feedback informed by anti-discrimination research and practice.

The fact that there are inter- and intra-group differences is the reason social cohesion needs to be researched in the first place. Concepts of intersectionality differ, among other things, in whether they locate or analyze intersections on the micro or macro level and how they interpret the connection between the two levels. In this article, the concept of *levels* is used to ask *what it is* that builds an intersectional relationship to one another. While social categories of identity and difference operate at the micro level, the macro level is constituted by structures of exploitation and domination within the social order, i.e. political economy, which result in ideologies of inequality. While terms such as the typical triad of race, class, and gender are *categories of difference*, racism or sexism are *ideologies of inequality*. Capitalism and patriarchy are *structures* of the social order.

Winker and Degele (2007; 2008; 2009) describe a "mirror-image relationship between identity and structure" (Forstenhäusler 2022, 85)[2] in their multi-level analysis. At the micro level, they locate the interactive construction of identity, following the ethnomethodological concept of *doing difference* (see West and Fenstermaker 1995). As in other approaches, the authors derive the micro level directly from the macro level. Individual identity categories are each assigned to a relationship of inequality at the structural level. In this way, the totality of social contexts appears fragmented: gender is reduced to a social category, class to an economic category and race to a cultural category, as Forstenhäusler (2022, 86) accurately criticizes. In fact, however, the various categories of difference need to be analyzed in each of the different dimensions of the social order. Their historical emergence and complexity need to be considered. Concerning mental disorders and their consequences, Schmidt (in this volume) has provided a successful empirical example linking the micro and macro level without this conflation. The mirror-image interpretation also means that structures of domination such as capitalism and patriarchy can hardly be criticized, because identity constructions act like a "self-relation of individuals" (ibid., 87 f.), which is independent of the material reality of social production and reproduction relations. The social constructionist understanding of intersectionality has many times been criticized for neglecting economical aspects (see Fraser 2006, 41 f. and Hill Collins 2011, 103 as cited in Frühauf 2021, 29 f.; see also Manow 2019; Forstenhäusler 2022). At worst, such an understanding does not criticize, for example, the existence of exploitative class relations, but only the fact that people are confronted with interpersonal prejudices in the social dimension due to their existing class affiliation (see Forstenhäusler 2022, 91; Kováts 2020).

Scholars in various academic disciplines and applied versions, for example, in democracy education, limit their understanding of intersectionality to the

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2 All English renderings of non-English-language works are translations by the author.

micro level and thus fall even further behind the mirrored understanding of identity and structure. There is a wide range of empirical case studies in which the effects of a particular intersection of identity categories are described. Such studies problematize narrative stereotypes that are derived from socio-cultural discourses without referring to or studying the underlying ideologies. In practice, they want to confront discrimination solely by means of targeted problem interventions in the form of diversity training and instructions for self-reflection. However, empirical studies that question the long-term effectiveness of such trainings point to the possibility of undesirable behavioral changes among participants (see Frühauf 2021; Tillmann 2022, 168 ff.). The focus of anti-discrimination practice on the effects rather than the causes of unequal treatment can, at worst, lead to the stabilization of the current social order and its ideologies by individualizing responsibility and repeating the neoliberal compulsion to self-optimization (see Kováts 2020). While it makes sense to criticize group-focused enmity or discrimination as unequal treatment at the micro level, societal structures and ideologies of inequality should not be disregarded as the cause of discrimination. Which identity categories are relevant to the micro level analysis is not uncontroversial within intersectionality research.[3] In addition to the triad of race, class and gender, there are numerous other categories of social difference. The question which axes of difference should be analytically prioritized in view of this quantitative problem of categories is the subject of controversial debate. Firstly, there is a question as to which axes of difference can be derived as subcategories from certain main categories (see Schmidt's contribution to this volume). Secondly, Walgenbach (2012) notes that intersectionality must be distinguished from approaches such as *diversity* or *heterogeneity* because the term aims to analyze relations of "power, domination and normativity" instead of listing any number of arbitrary social differences. Frühauf (2021, 55 ff.) more precisely criticizes social constructionist concepts of diversity-sensitivity for claiming that any ascription of meaning results in essentialism. For example, authors such as Leiprecht (2011; 2013; 2013), Lutz (2001a; 2001b; 2010) or Mecheril and Plößner (2009; 2018) demand that the individual reflects incessantly on essentialisms it might reproduce in addressing other people. This epistemology practically adheres to the neoliberal requirement of governmental self-optimization, as Frühauf[4] illustrates by analyzing the behavior of social workers who aim to work

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3 Furthermore, Aalders et al. (in this volume) have pointed out the difficulty of empirically capturing rare intersections and of specifying the intersectional characteristics of broadly shared experiences.

4 In addition to the aforementioned materialist and social constructionist understandings of difference, Frühauf presents Lacanian psychoanalysis as a third point of reference for feminist epistemology. Even though this strand of poststructuralist theory criticizes social constructionism and queer theory and

in diversity-sensitive[5] ways (for further criticism on policies on self-activation, see Eckhardt in this volume). On the premise that humans are not one self-identical entity but rather become individuated by language, it is not possible to fully represent anyone but still necessary to ascribe meaning to communicate. As Frühauf (2021, 195ff.) explains, the individual can therefore only remain guilty when facing the pressure, understood as the upshot of some social constructionist and deconstructionist approaches to intersectionality, to approximate the ideal of not ascribing essentialist meaning to others. Reducing intersectional analysis to the linguistic dimension therefore does not seem sufficient (see AFBL 2018; Linkerhand 2018a; Truman 2020; Otterstein 2022, 164). By explaining that communication-based *ableist* discrimination is not sufficiently covered in legislation, Stöcker and Namer's contribution to this volume demonstrated how to deal with the often-overseen *form* of language on a macro level beyond diversity trainings. With respect to the medical field, Vogt and Lazaridou's contribution pointed out that some classifications are indeed necessary apart from those that are exclusive and pejorative.

Rather than placing responsibility for injustice onto the individual, it is necessary to ask *which* ascriptions of meaning are rooted in structures of domination. Marxist, socialist and materialist feminism each have their own way of asking how social categories and material realities are connected and influence each other, clarifying that difference is more than an ascription in social interaction. With this claim, they disapprove of domination and exploitation based on difference and plead for a renewed focus on political economy. From the perspective of a critical theory of the social order, the structures of domination and ideologies of inequality that give rise to discrimination can be traced back to central structural categories at the macro level. In her theory of the *Matrix of Domination* or *Matrix of Oppression*, Hill Collins (1990) speaks in this regard of "interlocking structures of oppression" (cited in Klinger 2008, 39). Hill Collins' approach focuses on several dimensions of power that are reproduced in different forms of oppression. Klinger (2008, 42) proposes to analytically prioritize structural categories and understands them as principles that fundamentally structure production and distribution as well as the reproduction of the human species. Although it may make sense to maintain a categorical openness regarding individual identities at the micro level, at the macro level it must first be proven that an additional category

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shares some of its criticism with materialist feminists and critical theorists, the fields are not synonymous.

5 In trying to be fully inclusive, her interviewees tend to list more and more categories of difference. Some of them believe they have succeeded; others abort their list since they realize the attempt is bound to fail. The common conclusion of both groups seems to be their understanding of diversity as meaning "just everything."

is a cause and not just a consequence of social inequality (see ibid., 41; Forsten-häusler 2022, 95ff.). Klinger's approach avoids an affirmative relationship to categories by interpreting them not as identity markers but as societal factors influencing the constitution of the subject, and by understanding that these categories are historically developed and therefore also can change.

2. Three Challenges

So far, this chapter has introduced a brief history of intersectionality in its different interpretations and uses and illustrated a conceptual approach for distinguishing between these interpretations by how they refer to levels, dimensions, and categories. The following part of the chapter discusses three intersectional challenges to social cohesion and research on the subject. In the first section of this volume, Bayad et al. have introduced the difference between a maximalist-idealist and a minimalist-empiricist framework of social cohesion. The following sections of this chapter discuss how intersectional attempts can aim to facilitate an ideally inclusive version of cohesion by acknowledging empirical findings, on the one hand, without historically affirming the status quo, on the other.

2.1 The Role of Communities in a Cohesive Society

The *Research Institute Social Cohesion* aspires to not just any kind of social cohesion. The aim of its work is to contribute to the cohesion of *society*. In German language, there is a specific distinction between the terms social (*sozial*) and societal (*gesellschaftlich*). The former proposes that something has an interactive characteristic. "Social" (*sozial*), in this sense, can therefore be applied to the interpersonally or even just linguistically constructed identity of an individual or group. "Society" (*die Gesellschaft*), in contrast, is about more. It addresses the totality of the social order. In this understanding, social groups are an instance of mediation between the individual and society (Becker-Schmidt 1991b, 53). From here the question becomes: what kinds of social groups are relevant to social cohesion? To think about this, it is important to distinguish between the terms community (*Gemeinschaft*) and society (*Gesellschaft*).

Becker-Schmidt (1991b, 52) explains that group-formation requires individuation and socialization. In these processes, the individual learns, on the one hand, to understand its identity and articulate and enforce its own immediate interests as a self-willed being and is, on the other hand, disciplined enough to assimilate to norms and conventions of social interaction. Since humans are interde-

pendent beings that must produce, distribute, and reproduce in a relationship of reciprocity to survive, they need to find a balance between separation and assimilation. The outcome of this attempt might be called identity. While this ambivalent process situates an individual within various groups that are part of society, it also situates different groups in relation to each other. Any group whose cohesion is centered on a shared identity can be called a community. With respect to the very general topic of social cohesion, it might suffice to analyze the aspect of community-building. However, community-building around common identities is just one dimension of group-formation. Groups determined by structures such as class and gender are constituted by a third, intermediary entity: the political economy. The formation of these groups stems from the process of society-formation (*Vergesellschaftung*, see Becker-Schmidt 1991a, 37).

Social groups need to find a balance in the conflict between egoism and altruism (Becker-Schmidt 1991b, 53, 57ff.). This dialectic cannot be dissolved along particularistic[6] lines because different tasks involved in the production and reproduction of human life are divided hierarchically among the historically constituted groups. Such groups are dependent on each other, and their formation as groups is therefore only one part of society-formation. Historically, there have been situations where political movements acted on immediate community-based interests, as, for example, in the form of the methodological nationalism that Bayad et al. have criticized in this volume. In the case of National Socialism, the aim was to align the term "society" with an ideological imagination of an identitarian community by modifying the makeup of society. In this sense, eliminatory antisemitism constituted cohesion within the National Socialist society. In its most radical form, it is precisely the defeat of society that makes it appear as though a cohesive society had been successfully achieved. At the same time, many authors emphasize that community-building can nevertheless contribute to the goal of a truly cohesive society. However, this strategy is ambivalent insofar as linking societal cohesion and civil rights to groups rather than individuals can lead to situations in which individual freedom is oppressed in favor of an assimilation to communities. Attempts to guarantee equality, security, and freedom to certain groups may at times seem necessary, but such attempts are therefore insufficient when it comes to the task of facilitating cohesion of all members of society. In this volume, Eckhardt has pointed out that this strategy could lead to competition among interest groups and further fragmentation.

The term "society" is about understanding how the current social order has historically developed, acknowledging its contingent future development, and

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6 Particularistic approaches to community-building objectify identity and are subsequently called "identitarian".

discussing what kind of society we aspire to form. In contrast to ultimately particularistic constellations and ideological ideas of a cohesive society, scholars and users of the concept of intersectionality should think about how a cohesive society can be achieved between all the various groups and individuals that the existing society empirically and contingently consists of. This is not possible without discussing the current political economy as an obstacle. Trying to correct exclusive forms of social cohesion by including currently disadvantaged groups will lead to new forms of exclusion because production, reproduction, and distribution are structurally organized in a hierarchical way that depends on oppression and domination. Therefore, new excluded groups will come into being as soon as others are included—so long as the structure of distribution of labor and goods remains unchanged. Which groups are excluded from cohesion is not random, neither historically nor today, but dependent on ideologies (see Trumann 2014; Elbe 2015). Even if capitalism were to develop in a way such that, rather than certain groups, random individuals were relegated to the lower end of exploitation and domination, a cohesive society would not be realized without the disadvantaged needing to be ideologically "convinced" of the righteousness of their unequal situation.

2.2 Let's Not Race to the Bottom: Subject Constitution Needs More Than Just Identity Politics

Various authors see the problematic tendency of a negative ranking dispute, also known as a race to the bottom or oppression Olympics (see Brooks 2007, 70; Klinger 2008, 58; Otterstein 2022, 164), within identitarian interpretations of the concept of intersectionality. In view of the unfair distribution of resources within the existing social order, negatively affected groups compete for recognition. By attempting to improve the position of one's own group at the expense of other groups, one subordinates oneself to the existing social order instead of questioning structures of domination and exploitation as such. Attempts to take back the historical achievement of positive privileges instead of extending them to previously deprivileged groups harbor the danger of a counter- or anti-modern turn. Greater complexity in intersectional thinking is needed with regard to the possibility of privilege and marginalization being embodied simultaneously in one person. In this volume, Aalders et al. explained that privileged people can also be affected by discrimination. Thinking in terms of the friend-or-foe formula, which juxtaposes multiple discriminated positions, on the one hand, and multiple privileged positions (see the stereotype of the white heterosexual able-bodied man), on the other, can indeed expose the particularism and injustice

of existing conditions. However, this strategy seems unsuitable for promoting universally inclusive social cohesion. The focus on the micro rather than macro level of inequality, as problematized above, also results from the narrowing perspective on societal structures of exploitation and domination and ideologies of inequality when these are theoretically reduced to forms of privilege.

This dynamic can lead to certain social groups being burdened with the expectation of acting as a revolutionary subject that is imagined as particularly well suited to changing societal conditions, while others are demonized based on their identity and regardless of their actual behavior. This way of thinking resolves the tension between the structural reproduction of existing conditions and the individual's agency to change them unilaterally in favor of individual action, which reinforces the neoliberal compulsion for self-optimization. It also negates the necessity of an educational process that stands between one's identity and awareness of unjust societal conditions. This stance can be traced back to an improper equation of identity and subject (see Casale 2014). The concept of identity as a product of individuation and assimilation can be used to understand how an individual distinguishes itself from others and can thus develop self-awareness. The concept of the subject, furthermore, can be used to analyze the process in which individuals develop an understanding of the objective social order, its practical constraints, and their positioning within it. Only this awareness enables a subject to think about the contingency of a different social order and to influence its own living conditions, at least to a certain degree. Individuation is a necessary but not sufficient condition for the constitution of the subject, because self-consciousness does not *automatically* lead to the ability to reflect on one's immediate self-interest in favor of the common good (see Casale 2022, 95). In their contributions to this volume, Bayad et al. and Choudhary conclude from their empirical examples that a sense of belonging and social cohesion cannot be reduced to psychological aspects, which can be read in support of this claim. The examples in this volume of climate change, pandemics, inclusive infrastructures, and linguistic richness have demonstrated that supporting particular interests can indeed have positive effects on the general public in some cases. The challenge to social cohesion is to identify in which cases this is true. At the same time, improving living conditions for marginalized groups must be seen as a legitimate goal in itself.

Approaches that reduce the macro level to the cultural, narrative, or discursive dimension run the same risk as their micro-focused counterparts of only partially grasping the causes of discrimination. Stereotypes, prejudices, and external attributions have powerful consequences indeed. However, they are not upstream of, nor do they precede, the historical production of economic, political, and symbolic inequality, but rather result from it. For this reason, intersectionality research necessarily needs to consider the societal constitution of the sub-

ject. This is the level on which natural, historically created, or ideologically imagined inequalities become connected to valuation and hierarchization. From here, feminist standpoint theories (see Harding 2004) explain that the ability to become aware of certain forms of discrimination and to develop a political standpoint of social justice cannot therefore be derived directly from a marginalized identity. Between the social situatedness and a political stance there is an educational process in which individual experience is understood to be contextualized within social structures. By inquiring into the intention behind communication and pleading for a curiosity to understand the other person's perspective, Stöcker and Namer's contribution to this volume acknowledged this important difference. Furthermore, Bayad et al.'s contribution explained how ideologically driven polarization decreases social cohesion. Affirmative action, which is intended to increase the participation of marginalized groups (e.g., in the context of participatory democracy work or participatory research practice, as illustrated in this volume by Gangarova) is therefore a measure at the micro level that alleviates individual disadvantages but does not automatically change the social order. Nevertheless, the representation of social diversity *can* promote an engagement with the experiences of other social groups and thus support the individual educational process (see Gangarova and Choudhary in this volume). Such alliances also have an intra-categorical effect within discriminated groups. Crenshaw (1991) emphasizes the historical function of the recognition of differences in the context of identity politics in the United States by stating that the positive reinterpretation of categories of difference creates agency against difference-based discrimination.

The ideal-typical subject refers to the status of an autonomous, responsible, and educated citizen, which refers to both citizenship (*citoyen*) and economic ownership (*bourgeois*). Furthermore, the concept of the subject includes the possibility of interpersonal understanding. However, the universal civil rights promised since the Enlightenment have not been equally realized for all social groups (see Salzborn 2017, 51 ff.). Many authors in this anthology have identified exclusion and inequality as a threat to social cohesion, including Aalders et al., who pointed out that empirically existing injustices must be overcome to achieve the normative ideal of social cohesion. Intersectional identity politics is based on a critique of this unfulfilled promise and aims at a reflexive modernization within democratic societies. As part of a so-called strategic essentialism, heterogeneous individuals form alliances in precisely those identity groups that have historically legitimized their exclusion from the subject status. This strategy is intended to make it possible to articulate one's own societally neglected interests and to universalize the modern promise of the subject status. Many authors in this anthology share this

strategy with respect to the aim of strengthening social cohesion (see also Ashour and Dieckmann 2024).

An ambivalence in the use of identity-political categories, however, may arise when basic research and activist applications clash. As mentioned, instrumental reference to collective identities contains a danger that inequalities become affirmatively reinforced in practice and that individuals are subordinated to a community instead of becoming part of society. Crenshaw and other Black feminists before her criticized that differences *within* discriminated groups were not sufficiently considered in contemporary feminist and antiracist theory and practice. In the wake of this critique, there has been a new focus on differences within the group of women. Decades later, however, the influence of a multiculturalist understanding of identity in intersectional identity politics still needs to be problematized (see Singer 2005, 186; 2020; Nash 2008; Mende 2011, 48 f.; Becker and Streiß 2018; Stögner 2020a). In this volume, Aalders et al. and Stöcker and Namer have also drawn attention to the anti-categorial challenge. Historical and contemporary understandings of identity-based communities or even nation-state-based collectives in left-wing interpretations can have a negative influence on individual freedom as well as a cohesion of society on a global scale. While these ideas' impact is by no means to be equated with its aforementioned right-wing opponents, attempts to rehabilitate the idea of community must not ignore possible consequences of dissolving the dialectics of individual, group, and society into identity-based communities in particularistic terms. On the other hand, there are extreme forms of linguistic criticism of identity categories that fundamentally doubt the possibility of interpersonal understanding and thus also the possibility of appropriately recognizing different identities. This postmodernist identity-critical turn and its refusal to establish meaning contradicts identity-political projects by making the articulation of collective interests impossible and falling short of the democratic promise of freedom (see Klinger 1995, 805; Ludwig 2003, 56; Singer 2005, 183; Soiland 2011, 22, 27; Linkerhand 2018b; 2019). As mentioned before, social constructionism and radically deconstructive reactions to it adhere to neoliberal individualism, which dissolve the dialectic one-sidedly in favor of the other direction.

Right-wing equivalents of identity politics and critiques that falsely equate all identity politics to identitarian approaches have already been extensively researched within recent debates on "political correctness" and "cancel culture" (see e.g., Dowling et al. 2017; Martschukat 2018; Müller 2019; Daub 2022). While a cohesive society cannot be formed by refusing to grapple with the issue of discrimination, withdrawing from a discussion on the possible limitations of existing concepts in the field of anti-discrimination work and research does not do justice to the goal of societal cohesion. At the most, limiting the possibility of criti-

cism within scientific discourses might lead to a very fragile illusion of harmony. Salzborn (2017, 112ff.) offers an analysis of various postcolonial approaches that can be used to examine whether certain interpretations of intersectionality favor the goal of a cohesive society or just that of cohesive communities. He distinguishes *enlightened-egalitarian* and *identitarian-universalist* approaches from one that is itself racist. Whereas the former counter discrimination with a more or less prioritized reference to universalism and democracy, he argues, some authors develop an essentialist and biologist Black supremacist racism as their answer to white supremacist racism. This criticism can be applied to other ideologies as well.

Not every disadvantaged group is convinced of the righteousness of (global) societal cohesion. When trying to realize the ideal of an inclusive model of cohesion, it is necessary to implement measures of protecting the cohesive society against those who want to undermine the ideal due to their political beliefs. Supporting the idealistic version of cohesion thus renders it necessary to discuss which enterprises of influencing the various dimensions of the social order must be excluded in order to uphold the historical achievement of a cohesive society. The intersectional challenge here is to rid this discussion of the influence of ideologies of inequality that depict diversity as such as a threat to social cohesion. Since a polarization of belief systems leads to fragmentation (see Bayad et al. in this volume), this matter needs to be understood as one of education and subject constitution rather than one of spatial segregation.

2.3 Intersectionality as a traveling theory

Due to "numerous migratory movements and transformation processes", Lucy Chebout (2012) calls intersectionality a traveling theory. In this volume, Ashour and Holz have presented the similar idea of context-driven intersectionality in their article. A warning against an ahistorical and eclectic transfer of Crenshaw's theory to other contexts needs to be derived from this understanding. Choudhary, who presents the most complex empirical case of intersectionality considered in this anthology, demonstrates that including interreligious categories such as caste is highly relevant in some regions and critical in relation to certain research questions. The example of antisemitism can further explain how important it is to realign our understanding of which intersectional categories and dimensions are relevant to social cohesion. The history of slavery and colonialism plays an important role for discrimination in the USA, for which reason intersectionality as well as social cohesion research and practice are focused on critical race theory in the North American context. In the German-speaking and

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broader European context however, the aftermath of National Socialism must additionally be considered. The American understanding of whiteness does not do justice to the history of racism and antisemitism in Europe. Using theoretical approaches which attempt to explain the function of capitalism merely by privileges even replicates structural antisemitism. As a result, some scientific and activist interpretations of intersectionality reproduce antisemitism, which has been prominently criticized by feminist theorists, among others (see Stögner 2018; 2019; 2020b; 2022; Haug 2018; Stöver 2018; Ebert 2018; Elbe 2020; 2022; Mayrl 2020; Coffey and Laumann 2021).

In the 1980s and 1990s, there were already political practices in German and English-speaking countries that were aware of what is now commonly referred to as intersectionality. Examples include the feminist alliance conferences by and for Black, migrant and Jewish women (Ayim and Prasad 1992; see also Dean 2017), publications on the distant connections of racism, antisemitism and class oppression (Hügel et al. 1993) and on Jewish lesbian perspectives (Beck 1989) or the lesbian feminist Shabbeskreis (Baader 1993; Gelbin 1999; see also Antmann 2019). Walgenbach (2007, 27ff; 2012) offers a detailed overview of further interventions by Black women, women of color, migrant women, Jewish women, lesbians and women with disabilities that are considered as forerunners of and early applications of intersectionality. These examples of publications and political practices demonstrate that intersectional perspectives by Jewish women, as well as non-Jewish intersectional perspectives that include awareness for Jewish life and antisemitism, have preceded and historically accompanied the term intersectionality. Further analyses of how social history and the history of the concept are factually and potentially connected could promote cohesion among different intersectionally discriminated groups.

While this article cannot undertake this very important task, it can at least plead for understanding antisemitism as an intersectional ideology par excellence. Consequently, intersectionality research might improve its analysis of the political economy as well as its understanding of the ambivalence of social cohesion.[7] Referring to Joachim Bruhn (2019), Forstenhäusler (2022, 113) understands ideologies as a psychological coping mechanism for the injustice resulting from the social structure of capitalism. While these authors focus on the differences of antisemitism and racism, Stögner (2017) analyses the relationship of anti-

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[7] Concerning research about the impact of antisemitism on social cohesion, it should be mentioned that the International Holocaust Remembrance Alliance (IHRA) definition of antisemitism is preferred in this chapter over reference to the Jerusalem Declaration. Not only is the IHRA definition more precise and sensitive to a traveling ideology in different contexts, thereby reflecting on the macro level, but it also has a higher ability of reflecting the difference between identity and subject, see Rensmann (2021).

semitism and sexism. She explains that antisemitism is different from other forms of discrimination because antisemitism as an ideology does not function along binary categories. In antisemitic imaginations, the Jewish represents both ends of typical binary spectrums at the same time. Antisemitism consists of elements from many binary ideologies of inequality that are combined with a lack of understanding of capitalism.[8] Here, the complexity of society is represented in a misunderstood manner and at the same time legitimized (Stögner 2017, 27ff., 39; 2020b).

3. Specifying Terms for Researching Intersectional Challenges to Social Cohesion: Intersectionality of Ideologies

In this volume, Aalders et al. have discussed important methodological questions concerning intersectionality research and Eckhardt applied a critique of ideological consciousness and an analysis of subject constitution to an empirical example. Regarding the question of causalities, critical theories of the social order that combine social science findings with a philosophical critique of political economy are indispensable. Therefore, Stögner's suggestion (2017; 2020a) of examining the intersectionality of ideologies and social structure can be followed to help social cohesion research in its aim of contributing to a cohesive society:

"Ideologies are understood as processual social phenomena that have become entrenched and appear reified [...]. From an intersectional perspective, the specific ideologies [...] are not understood as mere facts of individual consciousness or transferred into the subject as mentalities but are defined as societally mediated. Ideologies are thus not just political orientations or machinations of the powerful in society, but false consciousness [...] As ideas that have become independent, they are to be thought together with the real historical movement of society itself and questioned as to their function in society. This is essentially the justification of unjust conditions." (Stögner 2017, 26 f.)

As mentioned, intersectionality research could make an even bigger contribution to social cohesion research by broadening its focus to consider the constitution of the subject at the macro level. Thinking about the intersectionality of ideologies performs this task. It moreover shifts back to the microlevel by analyzing how psychological formations such as the authoritarian personality, rather than merely identity construction, are bound to ideologies (Stögner 2017, 27).

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8 The term "ideologies of inequality" is therefore not sufficient to understand the phenomenon of antisemitism.

From an intersectional perspective, it is important to acknowledge inter-group differences and to immediately improve individual living conditions on a micro level. Intersectional perspectives can work of support in achieving a deeper understanding of various facets of discrimination. Therefore, an increasing focus on intersectionality in the field of social cohesion research is recommended. However, reductions of intersectionality to an obligatory buzzword without any depth of content should be avoided. Every project calling itself intersectional needs to demonstrate an awareness of the central discussion topics in *and around* intersectionality research, cultivate an interdisciplinary reception practice, and make a well-founded decision for their own interpretation and application of the term. Including the standpoint of marginalized groups into social cohesion research and policy work might make it easier to understand which structures are obstacles to a cohesive society. It is nevertheless important not to mistake any individual of a given identity for a legitimate representative of entire groups. Rather, voices that aim to further realize the promise of universal human and civil rights need to be included.

On the other hand, discussions about what a cohesive society is can demonstrate that intersectional research and policy need to address and change structures of the social order with the aim of sustainably improving intra-group relationships. Combining both fields, intersectionality and social cohesion, demonstrates the relevance of changing structures at the macro level of economy and law. Ideologies and their intersections are not only a threat to societal cohesion by negating it, but also constitute the glue of certain historically specific constellations of society and therefore function as a "positive" cause of societal cohesion. The question therefore arises as to how societal cohesion can be built that acknowledges the dialectic of equality, safety, and freedom. For example, it is undoubtedly important to question the separation of the public and private sphere from the perspective of feminist critiques of the distribution of labor or of domestic violence. Upholding the difference of such spheres, however, can be important with regard to *protecting* individuals from being forced into identitarian communities in the name of cohesion. How can a cohesive society be built that guarantees *equal* civil rights and economic wellbeing and safety in the public sphere and at the same time individual *freedom* in their private sphere—apart from referring to identitarian communities? To build a cohesive society, we need to ask how all individuals and groups can find a shared understanding of the structures that shape society in the present-day empirical as well as in the future and utopian sense. Inquiry into intersectional *challenges* to cohesion accounts for the ambivalent possibilities of the term "cohesion." It also allows us to understand that the meaning attributed to social differences can both facilitate and prohibit a cohesive society.

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